FINAL DRAFT

VISION 2030 JAMAICA

TOURISM

SECTOR PLAN 2009 - 2030

Tourism Task Force

September 2009

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1. Introduction

1.1 Vision 2030 Jamaica – National Development Plan

In 2006, the Government of Jamaica (GOJ) mandated the Planning Institute of Jamaica (PIOJ) to lead the preparation of a comprehensive long-term National Development Plan (NDP) which would place Jamaica in a position to achieve developed country status by 2030. Development of the Plan began in January 2007 and thirty-one Task Forces (TFs) including the Tourism Task Force were established thereafter. The TFs represent sectors and areas critical to the achievement of the national goals and have been charged with responsibility for developing the relevant long-term sector plans.

The Tourism Task Force commenced the Plan preparation exercise in May 2007, leading to the completion and submission of a 1st draft report for the long-term development of the Tourism Sector in Jamaica in October 2007. Following review, stakeholder consultation, and preparation of an action plan for the sector, the Tourism Sector Plan for Vision 2030 Jamaica was completed in 2009.

This Sector Plan for Tourism is one of the strategic priority areas of the ***Vision 2030 Jamaica - National Development Plan***. It is one of thirty-one sector plans that form the foundation for Vision 2030 Jamaica – a 21-year Plan based on a fundamental vision to make *'Jamaica the place of choice to live, work, raise families, and do business,'* and on guiding principles which put the Jamaican people at the centre of the nation's transformation.

Vision 2030 Jamaica will realize the vision of an inclusive, world-class, distinctly Jamaican tourism industry that is a major contributor to socio-economic and cultural development, with a well-educated, highly skilled and motivated workforce at all levels within a safe, secure and sustainably managed environment. The Tourism Sector Plan will: widen the participation in the tourism industry by local stakeholders; improve training and working conditions at all levels; promote investment and economic linkages; diversify our tourism product, source markets and market segments; improve standards and levels of customer service; increase the value earned and retained from each tourist; increase the use of Jamaican inputs and culture in all areas of the industry; and strengthen the integration of tourism development with sustainable land use planning and environmental management.

The preparation of the Plan was supported by a quantitative systems dynamics computer model – Threshold 21 (T21) – which supports comprehensive, integrated planning that enables the consideration of a broad range of interconnected economic, social and environmental factors. The T21 model is used to project future consequences of different strategies across a wide range of indicators, and enables planners to trace causes of changes in any variable or indicator back to the relevant assumptions and policy choices.

This sector plan was developed using the following processes:

- Participation of Task Force Members[1] through Task Force Meetings[2] that were used to solicit ideas and views on Tourism issues and challenges facing Jamaica as well as identifying a vision for Tourism in Jamaica, and determining key goals, objectives and strategies for the sector
- Hosting of a Tourism Sector Workshop involving sector stakeholders
- Research on international best practices in Tourism that could be adopted in the Jamaican context
- Review of relevant documentation on the Tourism Sector
- Development of a detailed Action Plan with responsible agencies and time-frames for implementation.

This Sector Plan for Tourism is structured in the following main chapters as follows:

- Situational Analysis
- SWOT Analysis
- Strategic Vision and Planning Framework
- Implementation, Monitoring & Evaluation Framework
- Action Plan

1.2 Tourism and National Development

The Tourism Sector represents an important component of national development particularly for small Caribbean states such as Jamaica. The Tourism Sector plan also will have implications for other areas of national development including transport, urban and regional planning, housing, services, agriculture and manufacturing.

Since the 1980s, tourism has been one of the leading growth sectors in the global economy. The sector has seen immense growth in revenue and employment as well as the development of new and fledgling markets. In 2008 international tourist arrivals grew by an estimated 1.9% over 2007 to reach 922 million. Total international tourism receipts totaled US$856 billion in 2007, representing around 30 % of the world's exports of services. Total international tourism receipts rose further to US$944 billion in 2008. Despite a downturn in 2009, world tourism is expected to continue the positive trends that have marked the industry in the past decade. According to the UN World Tourism Organization's (WTO) *Tourism 2020 Vision*, international arrivals are expected to grow by 4.1 % annually to 2020. Within this overall forecast it is projected that long-haul travel will grow faster, at 5.4% p.a. than intraregional travel, at 3.8% p.a. Europe will continue to maintain the highest share of world arrivals although there will be a decline in its share from the 60% share in 1995 to 46% in 2020. The long-term trends in global tourism also include: growth in emerging markets including China; the youth travel market; holistic tourism; eco-tourism; and increased importance of information and communication technologies (ICTs) and online travel services. These global trends provide an important context for the long-term planning for Jamaica's tourism sector.

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[1] See Appendix 1 for List of Members of the Tourism Task Force.
[2] See Appendix 3 for Listing of Task Force Meetings.

2. Situational Analysis – Jamaica's Tourism Sector

As one of the best-known island destinations, Jamaica enjoys significant competitive advantages in Tourism and Travel Services. Based on its strong brand image, an appealing natural environment and human and cultural assets, the Jamaican Tourism industry has been identified as one of the key industrial clusters deemed capable of driving sustainable economic growth in the long term.

Jamaica has had a long experience as a tourist destination, being a favoured retreat for travelers from Europe since the eighteenth century. The tourism industry, however, started in earnest in the late nineteenth to early twentieth century, with the first systematic efforts by Government to promote the industry, and by private investors to establish large hotels. The emergence of the industry coincided with the rapid economic growth of the United States, which has remained the main source of visitors up to the present.

Jamaica has been one of the best-known resort vacation destinations in the world for decades. Originally known for its stunning physical beauty and as a playground for the rich and famous, the island has since seen its tourism industry experience significant growth and diversification. Jamaica currently boasts one of the most diverse visitor accommodation sectors in the Caribbean, including world-famous all-inclusive resorts, upscale hotels and villas, and a range of distinctive tourist accommodations and attractions.

The sector has grown rapidly since Independence: visitor arrivals, less than 300,000 in 1962, reached 1 million in 1987 and by 1999, exceeded 2 million. In 2006, total arrivals passed the 3 million mark for the first time, 1.3 million of which were cruise passenger arrivals, reflecting a trend toward an industry based on short- as well as long-stay visitors. Today, the Tourism industry is one of the leading industries in Jamaica, contributing an estimated 8% of total GDP, directly employing approximately 80,000 persons and accounting for some 47% of total foreign exchange earnings from productive sectors in 2006.[3]

The planning for Vision 2030 Jamaica has taken place within the context of a global economic recession which commenced in US credit markets in 2007, and spread in 2008-2009 to affect the economies of developed and developing countries alike. The consequences for Jamaica are likely to include: reduced flows of direct investment; greater difficulty in sourcing financing from global capital markets; reduction in demand for Jamaica's exports; and a downturn in tourism earnings. The impact will limit the prospects for growth in our economy, including the tourism industry, and reduce funds

[3] Source: JTB. Following the revision of the System of National Accounts and revision of the National Accounts Classification of Industry undertaken by STATIN in 2008, Hotels and Restaurants accounted for 5.3% of GDP based on Contribution to Total Goods and Services Production at constant 2003 prices (ESSJ 2008).

available for spending on social services in the initial years of implementation of the National Development Plan, until recovery takes place.

2.1 Industry Structure

2.1.1 Overview of Tourism Sector

The tourism market is driven by disposable income, and is therefore sensitive to international economic conditions, particularly in countries that are the major sources of visitors. Jamaica is positioned in the market as a destination of variety, offering packages that satisfy a wide range of customers in terms of budget, life styles and social grouping. All market segments are not equally well served, however, and many growth opportunities exist.

The Jamaican tourism product comprises a complex value chain and network of services catering to visitors and domestic travelers. The industry is comprised of various private and public players in various sub-sectors, including: accommodations, tourist attractions, food and beverage facilities, ground transport, in-bond shopping, and crafts. The airline and cruise shipping industries are integral to the operations of the tourism sector, and there are numerous linkages with other sectors in the domestic economy. The tourism industry is based on a diverse range of natural, social, human and physical resources which include first-class white sand beaches, rain forests, wildlife, waterfalls, coral reefs and rivers, dynamic cultural and entertainment assets, trainable work force and extensive physical plant including some 224 hotels in 2008. The foundation for tourism development in Jamaica is the natural and cultural resource base, and careful balance must be maintained between the volume and type of tourist activities and the sensitivities of the resources being developed.

Accommodation: The Jamaican accommodation sub-sector is made up of hotels, resort cottages/villas, guesthouses, and apartments. The *Hotel Incentives Act* and the *Resort Cottages Incentives Act* enable tax incentives to be provided to properties to encourage improvement and development. The sector currently provides 29,794 rooms. The accommodation sub-sector is largely Jamaican owned, but a notable trend in recent years is the construction of large hotels by Spanish hotel chains.

All-inclusive and large hotels represent the main type of accommodation, accounting for most of the room capacity as well as the bulk of stop-over visitors and enjoying a very strong position in the market. This has been linked to market trends as well as perceptions about security. Large European Plan or "EP" hotels are less prevalent, and there are over 6,000 rooms in small hotels (under 50 rooms) and guest houses registered. There is a noteworthy absence of large convention hotels, a factor that has prompted the Government to commit to building a convention centre in Montego Bay.

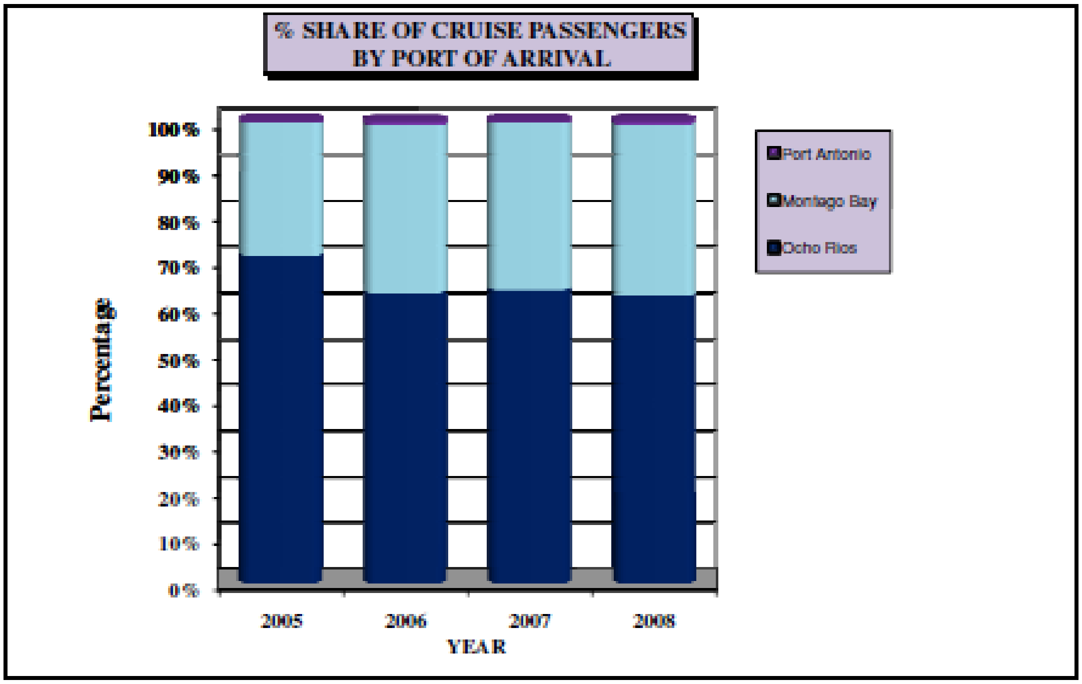
The island's tourism industry is centred around six defined resort destination areas: Montego Bay (9,307 rooms), Ocho Rios (8,202 rooms), Negril (7,574 rooms), Kingston (2,347 rooms), the South Coast (1,369 rooms) and Port Antonio (995 rooms). The performance of the visitor accommodation sector has been uneven, with large hotels showing significantly higher rates of room occupancy particularly among the all-inclusive category (which achieved average room occupancy of 67.9% in 2008). By contrast small hotels under 50 rooms only achieved 29.5% room occupancy in the same year.

Food and Beverage: Food and beverage facilities, whether incorporated within tourism accommodations or “stand alone”, are vital components to the tourist economy. The restaurant sub-sector has shown growth in recent years, driven by increased tourist expenditure, promotion, and the overall allure of local cuisine, as well as the strong business of the restaurants outside of the tourism industry.

Attractions: The attractions sub-sector of the tourism sector is a growing area which adds to the variety of Jamaica as a tourist destination and the overall tourism product. Attractions include natural or man-made horticultural, cultural, historical, equestrian, aquatic, aerial, eco-tourism, recreational and environmental facilities for tourists.

The existing attractions are diverse in nature and include: water parks; water based activities; adventure and nature based activities; one national park (Blue and John Crow Mountains National Park); three marine parks (Montego Bay, Negril and Ocho Rios); museums; animal parks; heritage sites; the Hope Zoo; mountain ranges; and hiking among others. Enterprises within this sector are usually organized as registered companies, which are monitored by TPDCo. There are also informal and community-based attractions, although information is inadequate as to their number and quality. Since 2003 incentives have been available for the establishment, refurbishment, conservation, reconstruction, and repositioning of attractions in the market place so as to stimulate growth in the sub-sector.

Cruise Tourism: Cruise tourism has steadily increased its share of total visitor arrivals over the years, and now accounts for approximately 38 % of the total arrivals. In 2008 there were 1.1 million cruise passengers who visited Jamaica. The industry is served by all the major cruise companies, of which the largest are Royal Caribbean Cruises Limited and Carnival Corporation. Key players in the cruise shipping industry are the cruise lines, Ministry of Tourism, the Jamaica Tourist Board, The Port Authority of Jamaica, in-bond associations, the Association of Jamaica Attractions Limited (AJAL), and ground transport agencies. The port of Ocho Rios continued to receive the largest share of the country’s cruise arrivals, followed by the ports of Montego Bay, and Port Antonio (see Figure 1).



Source: JTB, Annual Travel Statistics 2008, pg. 45

Figure 1: Cruise Passengers by Port of Arrival

Air Transport: Jamaica's air transport sub-sector is a critical resource to the Tourism and Travel industry. Air Jamaica, the national airline, has been an important provider of airlift capacity for the tourism industry over many years. The airline has had to grapple with issues of profitability over the years, and after years as a divested private sector entity, is once more being operated by the Government. Air transport has been significantly impacted by ongoing expansion and redevelopment of the Norman Manley International Airport (NMIA) and the Donald Sangster International Airport (SIA). Other developments include the increase in airlift services as new airlines and charters have started operating in Jamaica within the last five (5) years, opening new routes and markets especially out of the UK, Latin America and North America.

Ground Transportation: Ground transportation remains a crucial component for the delivery of quality service in the tourism industry, as sustainability of the tourism sector is linked to a modern, accessible, reliable, efficient, and customer sensitive ground transport sector. The tourism transportation sub-sector includes: (1) car rental operators; (2) contract carriage operators, e.g. tour companies/DMCs, transport associations like JUTA, JCAL and MAXI; and independent operators.

In-Bond Shopping: In-bond shops, located within airports, hotels and in modern shopping centres in the resort areas, enable tourists to access duty-free shopping and carry a wide range of imported luxury goods and souvenir items.

Craft Industry: The structure of the craft sub-sector in Jamaica is largely informal. The Ministry of Tourism guides the overall policy direction of the sector, while TPDCo provides product development services, marketing and promotional development, training, and monitoring of the sector. The Jamaica Business Development Centre (JBDC) also plays an important role. Through its Things Jamaica brand, the JBDC facilitates branding, distribution, market segmentation services, and market opportunities for craft products. Other stakeholders include: the various market/craft associations; the Urban Development Corporation (UDC); the Kingston and St. Andrew Corporation (KSAC) and other parish councils; and linkage sectors including hotels and other visitor accommodations, transportation, and attractions.

The domestic craft industry is based on majority home grown raw materials, with some amount of imported products which are not indigenous to Jamaica. Materials used include beads, shells, wood and other, mostly natural products. The trading sector is female dominated and there is homogeneity of craft items which translates into high levels of competitiveness. Most craft vendors buy from the same producers, so there is limited variety and the quality is often times low. The majority of local craft consists of handcrafted products, wooden statuettes, basketry and weaving, embroidery and sewn products, beaded, metallic and wooden jewelry and paintings. Craft vending is mainly done in craft markets in the resort areas, at locations that have proven in cases to be uncompetitive for the main tourist market, the cruise passengers or all-inclusive vacationers.

Local Travel Trade: The Local Travel Trade sub-sector of the industry consists of 174 registered travel agencies with 46 currently in operation. The number of players has declined mainly due to a reduction in commission and *e-ticketing* sales. New developments in the sector also have aided these changing trends: primarily, larger operators have diversified into providing other services (e.g. tourist visa services), while some smaller operators have merged. The primary service provided is the selling of tickets on a commission basis. Operators are licensed under the *Travel Agents Act* and monitored by the Ministry of Tourism. While informal operations exist, no figures exist on the extent of their impact on the sector.

The industry is expected to become more diversified with larger entities dominating. The emergence of Home Operations remains an interesting prospect with the Government looking at modifying legislation relating to the licensing of individual agents. Changes in the Air Travel (air transport routes) and the Cruise Shipping sectors should impact on competitiveness, efficiency, and sustainability of this sub-sector.

2.1.2 The Role of Government

Government participation and intervention in the tourism industry is crucial to its long-term development. The Government acts as regulator, facilitator, and arbiter through the various agencies under the portfolio ministry, and through the various policy and legislative arrangements it develops. Within the Government of Jamaica (GOJ) the Tourism portfolio is the responsibility of the Ministry of Tourism. Subjects within the Ministry's portfolio of responsibilities include: Marketing and Promotion, Tourism Policy, Tourism Product, and Travel Agencies.

Agencies under the Ministry's supervision (for the Tourism portfolio) include:

- Bath of St. Thomas the Apostle
- Devon House
- Jamaica Reservation Services Limited
- Jamaica Tourist Board
- Jamaica Vacations Limited
- Milk River Bath
- River Rafting Authority
- Tourism Product Development Company

The relevant statutes that govern the industry include:

- *Jamaica Tourist Board Act*
- *Tourism Enhancement Fund Act*
- *Hotel Incentives Act*
- *Resort Cottages (Incentives) Act*
- *Hotel keeper's Liability Act*

At the same time, several regulations are used in guiding policy direction and operations within the Ministry and the industry itself, including the following:

- *Jamaica Tourist Board Law and Regulation*
- *Tourist Shopping Regulation*
- *Travel Agency Law and Regulation*
- *River Rafting Regulation*

Development of the following tourism-related enterprises requires an Environmental Permit under the Natural Resources Conservation (Permits and Licences) Regulations (Amended) 2004:

- Hotel resort complex of 12 to 50 rooms
- Hotel resort complex of 51 rooms or more
- Recreational & Leisure Facilities
- Ecotourism & Nature Tourism Projects

The GOJ provides a number of services and facilities for development, including:

- Marketing/Promotion (JTB)
- Incentives for Accommodations, Attractions, Transportation
- Licensing/ Regulation of In-Bond Shops
- Training (TPDCo/HEART, Community Colleges, Universities)
- Facilitating financing: Ex-Im Bank, Development Bank of Jamaica, Tourism Enhancement Fund
- Infrastructure upgrading and improvement (NWA/UDC)

There are various types of incentives that are presently being offered to the accommodation sub-sector. These are:

- *The Hotel Incentives Act (HIA)*
- *The Resort Cottages Incentives Act (RCIA)*
- The Short-Term Incentives Programme (STIP)
- Emergency Incentives Scheme
- Small Hotel Incentive Grant

The policy guidance for the tourism sector is provided by the National Industrial Policy (NIP) of 1996, which has identified tourism as a priority sector for the long-term development of the nation. Under the leadership of the Ministry of Tourism, Jamaica also completed a Master Plan for Sustainable Tourism Development in 2003 which calls for the achievement of five main objectives, including: growth based on a sustainable market position; enhancement of the visitor experience; community based development; an inclusive industry; and environmental sustainability. A comprehensive Tourism Industry Act is currently being drafted to provide a modernized legislative framework for the development of the sector.

From 2003 to June 2009, a total of fifty-nine (59) attractions, representing both new (34) and existing (25) projects, have received incentives with capital investment totaling over $3.5 billion and employment of approximately 2,476 people.

The Training Division of TPDCo provides specialized skills upgrading and Team Jamaica programmes for the tourism sector and support services. Since the launch of the Team Jamaica programme in 1997 approximately 35,000 persons have become certified members of the tourism team. The collaboration with HEART Trust/NTA in 2004 has resulted in an increase in the rate of participation from 1,200 to approximately 7,000 participants per year. TPDCo also has been engaged in custom-designed skills upgrading programmes, including tour guiding, foreign language, housekeeping, food and beverage preparation and service, landscaping, customer care for the disabled and senior traveler, and golf caddie training. Over the period 1996 – November 2008, a combined total of 2,082 Team Jamaica and skills upgrading programmes were delivered, with 44,421 participants.

Other formal training for the sector including programmes in tourism and hospitality management is provided by the University of Technology, the University of the West Indies and Northern Caribbean University. Since 2004, the demands of the sector for training and assessments have increased by at least 150% per year. The demands of HEART Trust/NTA centres for Team Jamaica assessments are expected to increase in the same proportion in the next three years. Skills upgrading programmes will need to be developed for special categories of personnel, such as water sports lifeguards, in order to raise the skills levels of the current employees functioning at low literacy levels. Programmes to be developed and redesigned include cultural awareness and foreign language skills for dealing with the emerging Spanish and Chinese markets, attractions and small hotel operations for managers, craft traders' development, and motivation for tourism employees. There also needs to be a coordinated effort to ensure that the human resource development needs of the tourism sector are met by providing training that is relevant to the changing needs of the market.

2.1.3 Key Economic Linkages

The economic impact of the tourism sector is significant, although still not fully defined. The contribution to foreign exchange earnings has been noted above. The direct employment in the visitor accommodation component of the sector is calculated at

35,257 persons in 2008 based on the annual statistics prepared by the Jamaica Tourist Board (JTB). However, an assessment of the economic impact of the tourism industry in Jamaica carried out in 1997 estimated that the direct employment in the visitor accommodation component of the sector in that year was 33,927, while the total employment attributable to tourism in Jamaica including direct, indirect and induced employment was estimated at 160,762, representing approximately 17% of the total employment in Jamaica in 1997.[4] The importance of the economic contribution of the tourism sector derives from the linkages with other economic sectors as outlined below.

Agriculture: The major linkages between agriculture and tourism derive from the activities of domestic agriculture, in particular fruits and vegetables. The accommodation sub-sector is the main user of agricultural inputs, with the main method of procurement through large distributors or small contractors, which in turn source agricultural produce from farmers. A marketing project coordinated by RADA and involving the Sandals hotel chain represents an example of direct contract production between farmers and the hotel industry. This linkage has significant potential for expansion if local farmers can increase the range, quality and consistency of supply to the tourism sector.

Manufacturing: Within the manufacturing industry, the food and agro-processing, clothing, textiles and apparel, furniture and chemicals, and the cosmetic and pharmaceutical sub-sectors are most likely to have linkages with the tourist industry, as they supply products that serve as tourism inputs in the operation of tourist entities (e.g. furniture) or the direct consumption of tourists (e.g. apparel).

Over the past twenty years, the manufacturing sector has experienced considerable decline in terms of the number of establishments and products, but it continues to make a significant contribution to GDP (8.0% in 2008) and employment (6.1%). The Jamaican manufacturing sector is relatively high-cost and not very competitive across major product lines. This has made it difficult to compete directly with imports as suppliers to the tourism industry, especially since Government policy seeks to enhance the competitiveness of tourism by granting access to inputs at world market prices. The manufacturing sector therefore must find niches in which it can supply goods to the tourist industry on a competitive basis.

Construction: The linkage between construction and the tourism industry is manifested mainly in the accommodation sub-sector where large investments have brought several new hotel developments on stream. The rapid hotel expansion in the accommodation sub-sector also has created a demand for housing units, in, or close to resort areas to cater to workers in the industry. Further, there is a movement to market Jamaica as a luxury destination to capture the more affluent tourists. The development of the *Harmony Cove* resort, the luxury condominiums of the *Palmyra* group and other projects are expected to fuel growth in both construction and tourism, and also will require additional supporting infrastructure.

Public Utilities and Infrastructure: Public utilities and infrastructure including electricity, communications, transport, and water are integral to the functioning of the tourism sector. The electricity component is linked to the energy sector, and the Office of

[4] *Tourism in Jamaica: An Economic Analysis of.1997* (Pacific Analytics, Inc, 1997).

Utility Regulation (OUR) is the regulatory agency under which water and electricity fall. Other stakeholders include the Independent Energy Partners, the Petroleum Corporation of Jamaica, post and telecommunications agencies, mobile and fixed line phone operators, cable operators, internet service providers (ISPs), and suppliers and distributors of energy products.

The deregulation and liberalization of the telecommunications sub-sector has facilitated more accessible, easy, efficient and innovative use of internet and telephone services in hotels. Movements towards alternative and renewable energy sources may well see additional benefits to the energy sector as well as to tourism. Incentives granted for the purchase of solar energy panels are already impacting positively on the hotel industry. However, the expected higher demand for crude oil may be reflected in the final price of the product to tourists, which may impact on Jamaica's price competitiveness.

Water and sewage systems are critical factors in the quality of tourist facilities, especially accommodations and attractions. In addition, these systems are components in the overall carrying capacity of resort areas. The upgrading of water and sewage systems in resort areas is therefore of ongoing concern to the authorities, as well as the need to address the treatment of septage from large hotels. Major upgrading projects relevant to the tourism sector included the Montego Bay Sewage System and the Lucea - Negril Water Supply Projects under the Northern Coastal Development Project. The water sub-sector will benefit from a number of ongoing and planned water supply projects.

The critical area of transport infrastructure experiences its linkage with the tourism sector mainly through roads, the expansion of airport facilities, and cruise shipping ports. The Highway 2000 project, designed to link Kingston to Ocho Rios and Montego Bay via a modern toll road, and the Northern Coastal Highway Improvement Project (NCHIP) which on completion will extend from Negril through Montego Bay and Ocho Rios to Fair Prospect in Portland, covering four major resort zones, are currently the main features of road development which will directly benefit the tourism sector.

Major infrastructural works have been undertaken at the two international airports. The medium to long term development needs of the Norman Manley International Airport (NMIA) are guided by the 2004 Master Plan and should be affected through a twenty-year capital development programme valued at US$139.0 million. The expansion of the Ocho Rios cruise shipping pier and the construction of a marina at Port Antonio have been major developments in ports in recent years.

Services: The services sector of the Jamaican economy is diverse and touches on other sectors such as hospitality and tourism, entertainment, culture, education, finance and other services. The tourism industry also is an end-user of numerous other services including financial and real estate services, professional services, health care, and other commercial, domestic and personal services.

Entertainment: The entertainment sub-sector is one of the more vibrant within tourism, and represents a major opportunity for income generation and growth. It represents a powerful application of culture to creating an attractive Destination Jamaica experience and an opportunity to develop Brand Jamaica in marketing the tourism product. It is linked to the various musical festivities on the island, the National Festival, community festivities and local plays. Some of the major musical festivals include: *Air Jamaica Jazz and Blues, Rebel Salute* which fall within the Tourist Winter Season, *Reggae Sun Splash*, and *Sumfest* which fall within the summer period. Some major community festivals which feature local culture and cuisine include: *Calabash, Boston Jerk, Ocho Rios Sea Food and Maroon Celebration.* The entertainment sub-sector has seen a growing trend of appreciation for local theatre which employs a lot of the Jamaican culture. The anticipated increase in tourism activities should contribute to growth of the entertainment sector.

Financing: Financing for the tourism sector comes from a number of local sources, including commercial banks, development banks and institutions operating under the Financial Institutions Act (FIA). At the end of December 2008, total commercial bank loans and advances to the tourism sector stood at $40.8 billion, up from $7.0 billion at the end of 2002. The stock of commercial bank loans and advances to the tourism sector represented 16.6% of total commercial bank loans and advances outstanding at the end of 2008, a higher percentage than any other productive sector.[5] Over the same period loans and advances outstanding to the tourism sector from institutions licensed under the Financial Institutions Act fell slightly to $283.5 million at the end of 2008, compared to $293.1 million at the end of 2002. Loan disbursements made to the tourism sector by Development Banks including the Development Bank of Jamaica Limited (DBJ), Pan Caribbean Financial Services, National Investment Bank of Jamaica, National Development Foundation of Jamaica and the National Export-Import Bank of Jamaica Limited (EX-IM Bank) fell to $53.3 million in 2006, down from $357.9 million disbursed to the sector in 2002.[6]

The Tourism Enhancement Fund (TEF) was established in 2005 to provide financing for the development of tourist attractions and to support implementation of other aspects of the Tourism Master Plan. The TEF is funded through a Tourism Enhancement Fee of US$10.00 charged to incoming airline passengers and US$2.00 charged to cruise passengers. As at March 2009 the resources of the TEF stand at approximately $4.2 billion, with over $3.3 billion dollars approved for projects and over $1 billion disbursed. Since its inception to March 2009, over 90 projects have been approved for funding by the TEF.

Other funding sources for the tourism sector include international financial institutions, and multi-lateral and bilateral agencies which have provided significant levels of funding for tourism-related infrastructure including the North Coast Highway Improvement Project, expansion of cruise ship piers, and sewage and water projects in resort areas. While the sector receives funding from a number of sources as outlined above, there are gaps in the availability of financing for tourism development in Jamaica. In particular, small hotels and the attractions sub-sector have experienced difficulty in obtaining adequate levels of financing for upgrading of existing facilities and construction of new projects.

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[5] ESSJ 2008.

[6] The Development Bank of Jamaica Limited and National Investment Bank of Jamaica were merged in September 2006. Comparable data for total financing to the tourism sector from local development financing institutions are not available for 2007-2008.

2.2 *Industry Performance*

2.2.1 Sector Performance

Jamaica's tourism industry has shown growth in recent years due mainly to a diversified product, increased investments and capacity building, and factors external to the Jamaican market. The average GDP growth for Hotels & Restaurants[7] over the five years 2004-2008 was 4.5 % (see Figure 2). In 2006 the growth rate of the industry increased significantly to 10.1 %, influenced mainly by the impact of natural disasters on some competing destinations, particularly Cancun, Mexico.[8]

However, in 2007 and 2008 the growth rate fell to 0.7 % and 2.7 % respectively. This slowing in the rate of growth was influenced by the return of cruise ship passengers to Cancun in 2007 following the recovery of that destination, and the unfavorable global economic conditions and associated downturn in consumer confidence in the main source markets, especially during the second half of 2008.

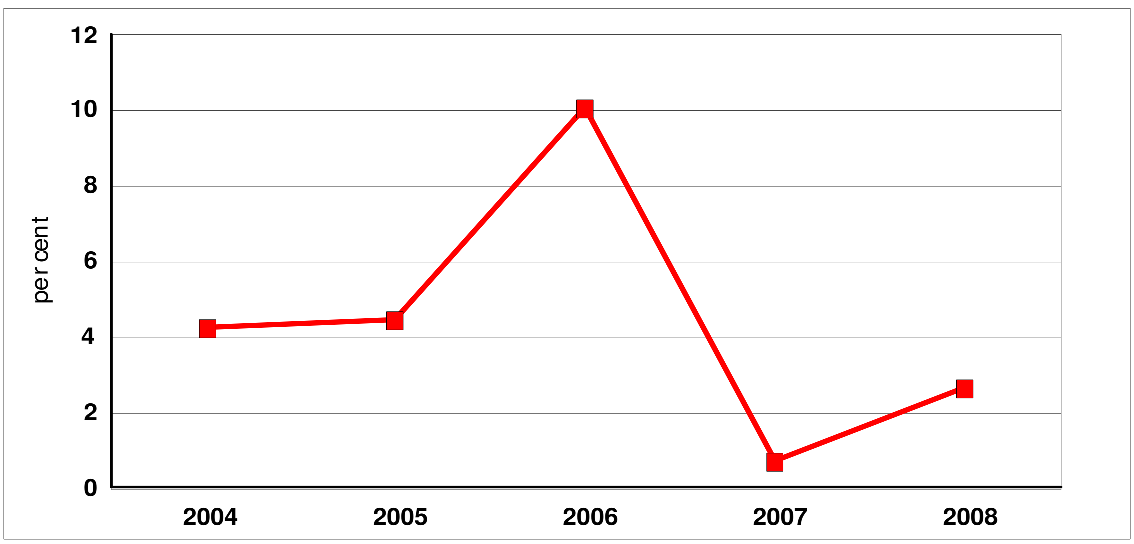


Figure 2: Year over Year Change of Real Value Added in Hotels & Restaurants 2004-2008

The last five years (2004-2008) have brought a number of developments within the tourism sector, in particular, increased visitor retention and spending, as proof of trust in Jamaica's tourism product and services. Over this period, the industry experienced 3.2%

[7] Based on value added at constant (2003) prices (ESSJ 2008). There was a name change during the course of 2008; the industry is now called Hotels & Restaurants instead of Hotels, Restaurant & clubs. Hotels & Restaurants captures most of tourism's direct contribution to real value added.

[8] During 2005, there was extensive damage to this destination due to Hurricane Wilma. This resulted in a diversion of visitors from Cancun to Jamaica and other tourist destinations.

annual growth in total visitor arrivals. Stopover arrivals averaged 5.7% growth per annum, while cruise passenger arrivals averaged -0.2% (see Table 1).

Table 1: Visitor Arrivals 2004-2008

Arrivals	2004	2005	2006	2007	2008	% Annual Growth (1)
Stopover Arrivals	1,414,786	1,478,663	1,678,905	1,700,785	1,767,271	5.7%
Cruise Passengers	1,099,773	1,135,843	1,336,994	1,179,504	1,092,263	-0.2%
Armed Forces	2,737	1,407	999	1,229	1,010	-22.1%
Total	2,517,296	2,615,913	3,016,898	2,881,518	2,860,544	3.2%

Source: JTB Annual Travel Statistics 2004-2008
(1) Compound annual growth rate from 2004-2008

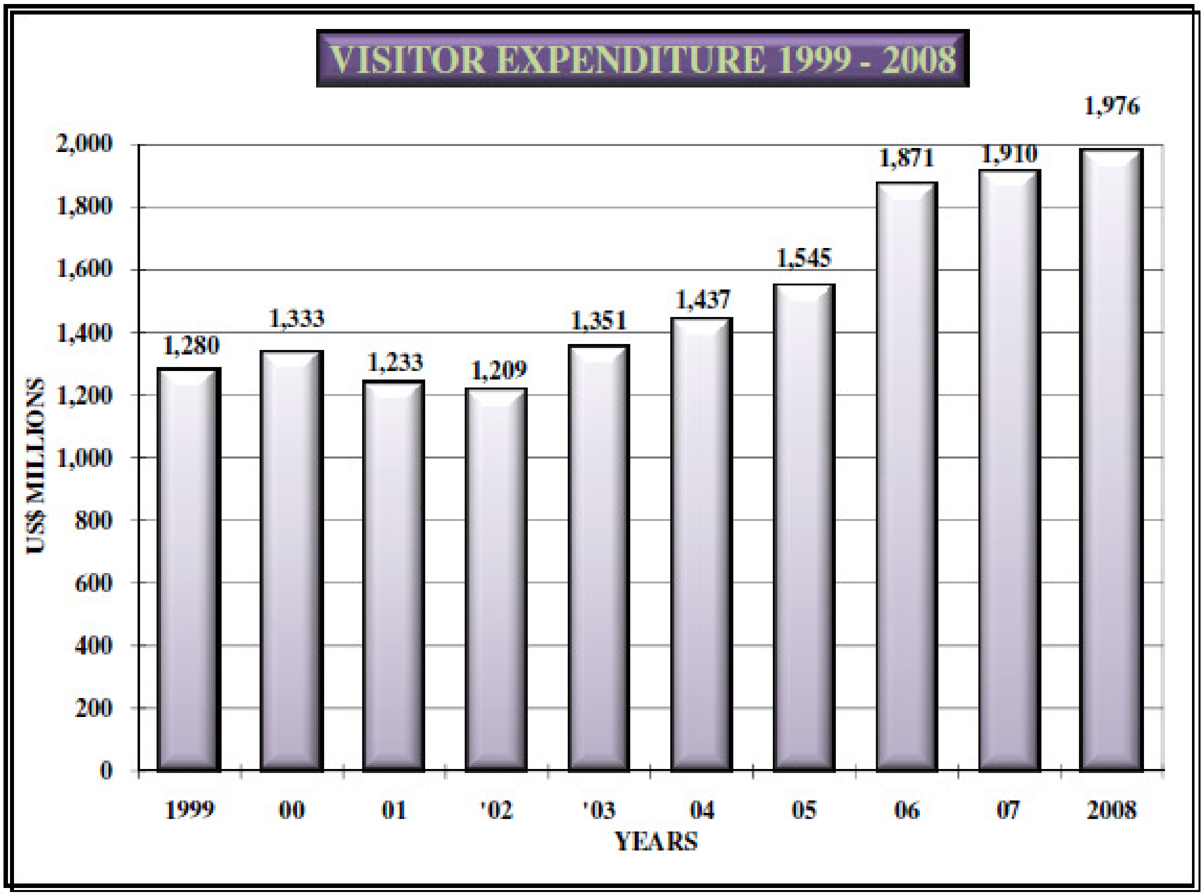
The tourism industry has shown strong and sustained growth since Independence. The total number of visitor arrivals to Jamaica has grown from some 271,692 in 1962 and 670,202 visitor arrivals in 1982 to a total of 2,860,544 visitor arrivals in 2008, an annual increase of 5.3% over the 46 year period. The island saw a record 3,016,898 visitors in 2006. The island's tourism accommodation stock increased from 10,327 rooms in 1982 to 29,794 rooms in 2008, while total receipts from tourists grew from US$337.8 million in 1982 to US$1,975.5 million in 2008 (see Table 2). The development of the tourism sector over this period has seen an increase in the relative importance of cruise passenger arrivals which grew from 29% of total visitor arrivals in 1982 to 38 % of total arrivals in 2008. There also has been the emergence of globally competitive Jamaican-owned all-inclusive hotel chains such as Sandals, SuperClubs and Couples, and the diversification of tourism markets including growth in arrivals from the United Kingdom, Europe and the Caribbean in addition to the traditional North American markets.

Table 2: Summary Performance of the Tourism Sector 1962 - 2008

Item	1962	1982	2008	% Annual Growth (1)
Total Visitor Arrivals	271,692	670,202	2,860,544	5.25%
Tourism Receipts (US$ million)	34.7	337.8	1,975.5	9.18%
Number of Visitor Accommodation Rooms	3,736	10,327	29,794	4.62%

Source: JTB
(1) Compound annual growth rate from 1962-2008

Visitor expenditure increased from US$1,279.5 million in 1999 to US$1,975.5 million in 2008 with an average of US$1,514.4 million over the period (see Figure 3). Additionally, the average length of stay of foreign national stopover visitors over the period 1999-2008 was 9.9 nights per visitor, while direct employment in the accommodation sub-sector was averaged at 31,741 over the same the period.



Source: JTB Annual Travel Statistics 2008

Figure 3: Visitor Expenditure 1999 - 2008

For the most part, this active visitor retention was supported by patronage from the usual market segments with visitors from the USA representing a 65.1 % market share of Jamaica's stopover visitor arrivals in 2008, the United Kingdom with 10.7 %, and Canada with 13.4 %. As shown in Table 3 below, stopover arrivals from North America have grown by 5.9 % annually over the past 5 years or slightly faster than total stopovers, indicating that Jamaica remains highly dependent on North America as its main source of stopover arrivals.

Table 3: Jamaica - Stopover Arrivals by Source Country of Residence 2004 - 2008

Source Country	2004	2005	2006	2007	2008	% Change (3)
USA	996,131	1,058,317	1,190,721	1,132,532	1,150,942	3.7%
Canada	105,623	116,862	153,569	190,650	236,193	22.3%
North America	1,101,754	1,175,179	1,344,290	1,323,182	1,387,135	5.9%
United Kingdom	158,818	149,773	175,363	185,657	188,436	4.4%
Other Europe	83,107	84,106	80,711	103,237	96,264	3.7%
Europe	241,925	233,879	256,074	288,894	284,700	4.2%
Latin America	8,537	8,428	11,101	12,169	16,122	17.2%
Caribbean	51,549	50,239	55,948	62,967	67,231	6.9%
Other Countries (1)	11,021	10,938	11,492	13,573	12,083	2.3%
Total Stopovers (2)	1,414,786	1,478,663	1,678,905	1,700,785	1,767,271	5.7%

Source: JTB Annual Travel Statistics 2004-2008
(1) Includes African Countries, Japan, Australia, India, Pakistan, and Other Countries
(2) Includes arrivals by Jamaican nationals resident abroad
(3) Compound annual growth rate from 2004-2008

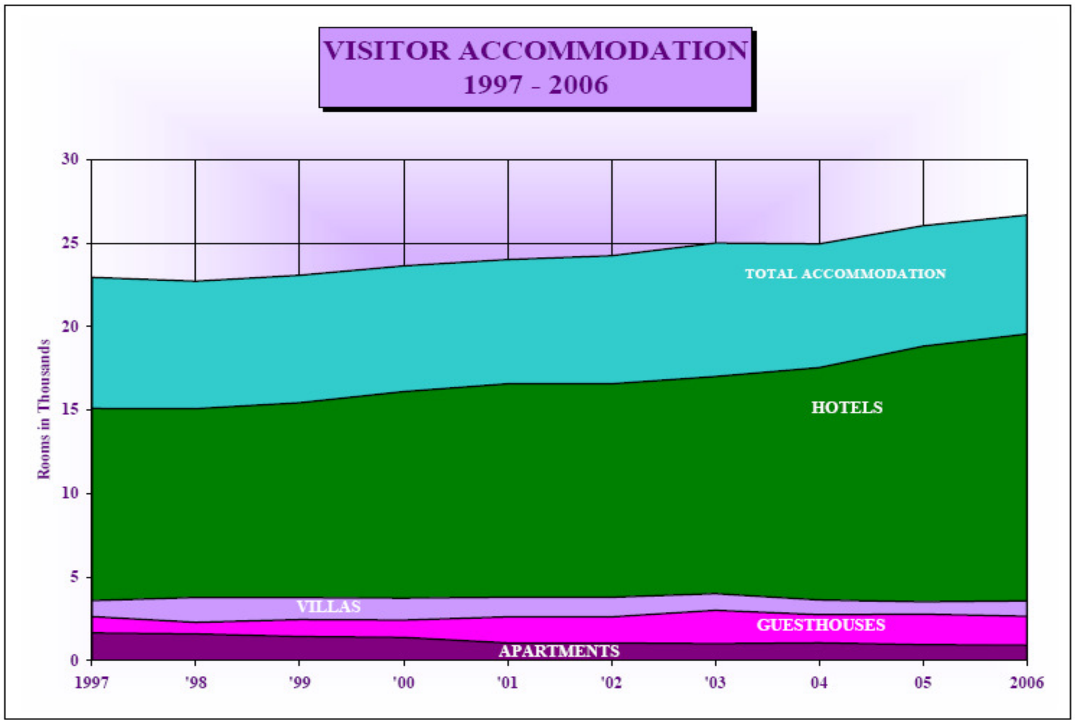
As shown in Table 4 below, foreign direct investment in the tourism industry in Jamaica has averaged US$143.6 million annually over the period 2003-2007, representing 19.1% of total foreign investment inflows over the same period.

Table 4: Foreign Direct Investment - Tourism 2003 - 2007

US$ millions	2003	2004	2005	2006	2007	Average
Tourism FDI	114.3	114.6	106.7	185.7	196.9	143.6
Total FDI (1)	720.7	601.6	682.5	882.2	866.5	750.7
Tourism as % of Total FDI	15.9%	19.0%	15.6%	21.0%	22.7%	19.1%

Source: BOJ Annual Balance of Payments 2003-2007
(1) Includes retained earnings

Accommodation: Over the last five years the number of rooms in visitor accommodation has grown from 24,947 in 2004 to 29,794 at the end of 2008, a growth rate of 3.1% per annum. Of the total number of rooms, 22,323 are in hotels. Between 2002 and 2006 almost 3,000 new hotel rooms were added to the island's inventory, with a further 7,000 new rooms expected to be added within the subsequent five years. A number of hotels are scheduled to come on-stream or are already under construction, which include Iberostar Rosehall, Palmyra, RIU IV, AM Resorts, and Fiesta among others, which when completed will add over 6,000 new rooms.



Source: Jamaica Tourist Board (JTB), Annual Travel Statistics 2006, pg. 72

Figure 4: Visitor Accommodation 1997 - 2006

***Cruise Tourism*:** For the sixth consecutive year, Jamaica welcomed over 1 million cruise passengers to its shores in 2008, an indicator that there remains strong confidence in the Jamaican product and service, and its attractiveness as a destination of choice. In 2006 the country experienced a record 1,336,994 cruise passengers arrivals, over the 1,135,843 for 2005. This performance was rewarded with the award for the Caribbean's Leading Cruise Destination for the second year in a row and The World's Leading Cruise Destination for the first time from the World Travel Awards in 2006. This reflects the steady performance of the cruise shipping industry which has recorded an average 3.2% growth annually over the past five years from 2004-2008.

The prospects for the cruise industry in Jamaica are being viewed with much enthusiasm as several developments are expected. The 2006 signing of a five-year contract between the Port Authority of Jamaica and Royal Caribbean Cruise Limited (RCCL), valued at over US$16.5 million, will guarantee that RCCL provide a minimum of 2.3 million cruise passengers over the next five years. Additionally, the planned development of Falmouth as a brand new cruise port along with the planned expansion of the Port of Montego Bay are expected to boost the country's chances of capitalizing from the changes in the industry. These changes suggest that Jamaica, like most other destinations, will have to expand ports to accommodate mega liners (like the *Freedom of the Seas* that made its first call to the port of Montego Bay in June 2006), improve marinas, and diversify the cruise experience to include more land excursions, water sports and other activities.

Ocho Rios is the main port of call for cruise ships, receiving 679,247 cruise passengers in 2008 or 62.2% of total cruise passenger arrivals for that year, while Montego Bay received 405,999 cruise passengers representing 37.2% of the total (see Table 5 below).

Table 5: Jamaica - Cruise Passenger Arrivals by Port of Call 2004 - 2008

Port of Call	2004	2005	2006	2007	2008	Average
(Number of Arrivals)						
Montego Bay	328,006	326,964	485,325	425,582	405,999	394,375
Ocho Rios	768,263	804,863	840,923	749,281	679,247	768,515
Other Ports of Call (1)	3,504	4,016	10,746	4,641	7,017	5,985
Total	1,099,773	1,135,843	1,336,994	1,179,504	1,092,263	1,168,875
(% of Arrivals)						
Montego Bay	29.8%	28.8%	36.3%	36.1%	37.2%	33.7%
Ocho Rios	69.9%	70.9%	62.9%	63.5%	62.2%	65.8%
Other Ports of Call (1)	0.3%	0.4%	0.8%	0.4%	0.6%	0.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: JTB Annual Travel Statistics 2004-2008
(1) Includes Kingston and Port Antonio

Jamaica's nautical tourism sub-sector includes yachting and sport fishing, which have received a boost in recent years through the expansion of marina facilities, including construction of the West Harbour Marina in Port Antonio.

Attractions: A total of 8 attractions were added to the sub-sector in 2006. Over the fiscal year 2008/2009, 9 new applications were approved under the Attractions Incentives Programme (AIP) and 2 renewals were granted to properties already benefitting from this incentive. The attractions sub-sector is expected to continue to grow, driven by the expected growth in cruise passenger arrivals and stop over arrivals and influenced by an increased promotion of domestic tourism. The expansion will, however, be subject to the constraints of the carrying capacity of resort areas.

Craft: The craft sub-sector has not grown significantly during the last five years. This was a result of the various problems/ challenges facing the industry, including: competition from in-bond shops; low skilled level of craft vendors which translates into poor output of craft items; craft vendors not using skills learnt; poor craft market facilities; and lack of patronage from tourists who sometimes do not leave hotel properties or cruise liners. The renovation and construction of several craft villages and markets, as well as increased promotion through Things Jamaica and other ventures, are expected to improve growth potential within this sub-sector. In planning for the expansion of resort areas, it will be important to plan for the development of the craft industry so that craft producers and vendors are not placed at a disadvantage to other components of the shopping sub-sector, including in-bond merchants and souvenir stores.

Air Transport and Local Travel Trade: Jamaica's Air Transport sub-sector is a critical resource to the Tourism/Air Travel industry. There are presently some 50 travel agencies in operation in Jamaica, 22 of which have been registered since 2000. The Travel

Agencies industry in Jamaica has contracted over the last ten years, declining from 174 to 50 registered travel agencies over the period. This is primarily as a result of a decrease in the level of commission paid by airlines, which is down from 9% as of 2003 to 3% by 2009.

The tourism industry has benefited from a number of new airlines and airlifts in recent years, including Virgin Atlantic operating out of UK, Canjet and Sunwing operating out of Canada, and Delta Airlines coming out of the USA which has added nonstop flights to Kingston since June 2006. The national airline to date has been a major part of the industry. However, Air Jamaica has ceased flying the London route while Virgin Atlantic has introduced weekly flights out of that destination. This is expected to positively affect visitor arrivals as easy airlift access could lead to an increase in visitor arrivals. The availability of airlift also plays a particularly important strategic role in developing new geographic markets.

Ground Transport: From 1997 to March 2006, the sub-sector was guided by an interim policy measure and by October 2006, the *Tourism Ground Transportation Sub-Sector Incentive Policy* came into effect. The purpose of the tax incentives under these policy initiatives is to establish harmony and consistency among the various incentive regimes of the transportation sub-sector of the industry, and also, to create the enabling environment for ensuring a safe and reliable service of a high standard and quality at a world-class level to the diverse group of tourists that visit Jamaica. From 1997 to 2003 the industry was allocated 4,200 cars at 0% duty; in 2005, the sector received 700 vehicles at 40% duty; and in 2006, the sector was allocated 500 vehicles at 25% duty. A total of 246 vehicle applications were approved in 2007/2008, and 201 in 2008/2009.

2.2.2 Regional Performance

Total stopover tourism arrivals to the Caribbean rose by 61.2% from 14.71 million in 1995 to 23.71 million in 2008,[9] while total stopover arrivals to Jamaica grew by 54.1% over the same period, rising from 1.15 million in 1995 or 7.8% of total stopover arrivals to the Caribbean in that year, to 1.77 million in 2008 or 7.5% of the total, indicating that Jamaica is generally holding its market share in the Caribbean tourism market. The countries in the region which showed the greatest growth in visitor arrivals and visitor accommodation during this period included the Dominican Republic and Cuba, which tend to be lower-priced than Jamaica. As Table 6 below indicates, these regional competitors have significantly outperformed Jamaica in growth of stopover arrivals over the period 1995-2008. By comparison, stopover arrivals to Cancun, Mexico were 2.1 million in 2005 before falling to 1.6 million in 2006 consequent on the impact of Hurricane Wilma, then rising once again to 2.2 million in 2008.

[9] Source: CTO. Stopover arrivals for 2008 do not include Dominica, Guadeloupe, Haiti, St. Kitts and Nevis, and Turks and Caicos Islands. Stopover arrival figures for only part of 2008 include Aruba (January-September), Bonaire (January-October), Curacao (January-September), Guyana (January-May), St. Eustatius (January-July), St. Vincent and the Grenadines (January-August), Suriname (January-February), and Trinidad and Tobago (January-July).

Table 6: Stopover Arrivals to Selected Caribbean Destinations 1995 - 2008

COUNTRY	1995	2000	2008	% CHANGE 1995-2008
	('000s)	('000s)	('000s)	
Antigua and Barbuda	220.0	236.7	265.8	20.8%
Bahamas	1,598.1	1,544.0	1,462.4	-8.5%
Barbados	442.1	544.7	567.7	28.4%
Cuba	738.2	1,774.0	2,348.3	218.1%
Dominican Republic	1,932.2	2,972.6	3,979.6	106.0%
Jamaica	1,147.0	1,322.7	1,767.2	54.1%
St. Maarten	479.7	432.3	475.4	-0.9%
US Virgin Islands	453.7	545.9	678.9	49.6%

Source: CTO

Other regional comparisons indicate that Jamaica spends relatively less on marketing expenditure per room and earns relatively less stopover income per employee in accommodation than other main Caribbean destinations.[10] The following tables provide comparative indicators for stopover arrivals and visitor expenditure for Jamaica and its main regional competitors. These show that average room occupancy rates in Jamaica over the period 2000-2004 have been below the levels of its main competitors, namely the Dominican Republic, Cuba, Cancun and the Bahamas. Average length of stay has been approximately the same for these countries, apart from the Bahamas which has a high percentage of short-trip visitors from the United States. Jamaica also earns significantly less from each stopover visitor than the Cayman Islands and Barbados.

Table 7a: Comparative Stopover Indicators for Selected Caribbean Destinations 2000-2005

COUNTRY	Total Stopover Arrivals 2005	% Annual Change in Arrivals 2001-2005	Visitor Accommodation Rooms 2004	% Room Occupancy 2000-2004	Average Length of Stay (Days) 2000-2004
Bahamas	1,514,532	-0.38%	15,508	62.9%	5.9
Barbados	547,534	1.93%	5,945	50.0%	10.3
Cancun (Mexico)	2,134,180	-0.51%	27,522	71.8%	4.7
Cayman Islands	167,801	-15.82%	5,127	51.1%	6.4
Cuba	2,319,334	6.92%	45,270	64.8%	10.5
Dominican Republic	3,690,692	7.36%	59,082	69.2%	9.6
Jamaica	1,478,663	3.74%	24,947	57.9%	10.0
Trinidad and Tobago	460,195	4.69%	5,379	48.9%	14.3

Source: CTO

[10] See Bartlett in Hall and Holding (Editors) (2006) pp. 21-24.

Table 7b: Comparative Visitor Expenditure Indicators for Selected Caribbean Destinations 2006

COUNTRY (2006)	Total Visitor Expenditure (US$ mil)	Stopover Visitor Expenditure (US$ mil)	Cruise Passenger Expenditure (US$ mil)	Expenditure Per Stopover Visitor (US$)	Expenditure Per Cruise Passenger (US$)
Bahamas	1,884.50	1,698.7	185.8	1,030.99	55.3
Barbados	763.20	691.1	72.2	1,252.10	100.03
Cancun (Mexico)	1,483.1	n.a.	n.a.	n.a.	n.a.
Cayman Islands	519.00	332.5	186.5	1,279.35	110.12
Cuba	2,113.6	n.a.	n.a.	n.a.	n.a.
Dominican Republic	3,180.4	n.a.	n.a.	n.a.	n.a.
Jamaica	1,436.6	1,346.0	91	951.38	82.74
Trinidad and Tobago	260.3	n.a.	n.a.	n.a.	n.a.

Source: CTO

The regional dimension also includes the potential benefits to be derived from developing regional solutions to problems confronting tourist destinations in the Caribbean, including combined marketing programmes, strengthened regional collaboration in trade and industry negotiations, and development of regional environmental and hazard mitigation and emergency response programmes. The possibilities for collaboration among regional partners include promotion of multi-destination packages as well as joint promotion of attractions as currently obtains with Cuba, St Lucia and Barbados.

2.2.3 Tourism Master Plan

In 2003 Jamaica completed a Master Plan for Sustainable Tourism Development which calls for the achievement of five (5) main objectives, including:

- growth based on a sustainable market position;
- enhancement of the visitor experience;
- community based development;
- an inclusive industry; and
- environmental sustainability.

The framework of the Tourism Master Plan envisages annual growth rates of 4.0% in visitor accommodation over the 10-year period from 2003-2012, which would add over 10,000 rooms by 2012. Over the first four years of the Plan a total of 2,050 new rooms have been added, representing annual growth of 2.7% in tourism accommodation from 2003-2006. Recent initiatives taken by the Government and private sector of Jamaica also include: the establishment of Resort Boards and special patrols in tourist areas to combat crime and harassment; infrastructural upgrading projects on the North Coast; investment in new hotels; and establishment of the Tourism Enhancement Fund to carry out improvement of the local tourism product in the island's main resort destinations and support implementation of other aspects of the Tourism Master Plan.

While there has been progress toward meeting some of the growth targets of the Master Plan, there are other areas that have not seen commensurate progress, including community based development and environmental sustainability. There has been expansion of community tourism initiatives by organizations such as Countrystyle and Unique Jamaica in recent years. These include: establishment of the Sustainable Communities Foundation, Countrystyle Institute for Sustainable Tourism (CIST) and Countrystyle Community Tourism Network; implementation of training and marketing programmes in community tourism; and staging of the 1st International Institute for Peace through Tourism (IIPT) International Community Tourism Conference & Communities Trade Show in Jamaica in 2008. However, these initiatives have not yet achieved the levels of progress in advancing community based tourism envisaged by the Master Plan. Similarly, there remain deep challenges in addressing the environmental impact of tourism development as noted elsewhere.

It is important to recognize that there are several challenges involved in building successful community tourism. These include: limited capacity of community members; lack of adequate social and physical infrastructure; inadequate financial and human resources; and potential domination of such ventures by community elites.[11] These challenges imply that the process of community based development will require commitment of resources to building capacity and infrastructure at the community level as well as creation of marketing and management models that are sensitive to the needs of communities and visitors and that facilitate genuine inclusion of community members.

It should be noted that the Vision 2030 Jamaica - National Development Plan will build on the Tourism Master Plan in the development and implementation of this Tourism Sector Plan.

2.3 Trends and Long-Term Prospects

2.3.1 Global Tourism

Since the 1980s, tourism has been one of the leading growth sectors in the global economy. The sector has seen significant growth in revenue and employment as well as the development of new and fledgling markets. From 1950 to 2007, international tourist arrivals grew from 25 million to 903 million. Total international tourism receipts were US$856 billion in 2007, representing around 30 % of the world's exports of services. Total international tourism receipts rose further to US$944 billion in 2008. However, international tourist arrivals declined by 8% between January-April 2009, reflecting the downturn in global economic conditions. Growth was negative in all world regions except for Africa, with the Middle East and Europe being the hardest hit. The Caribbean sub-region recorded a decline of -6% in arrivals over the first four months of 2009, reflecting the impact of decreased arrivals from the USA and Europe in many of its

[11] See for example chapters by Hendrickson and by Jayawardena in Hall and Holding (Editors) (2006) e.g. pp. 68-69 and 299-301.

destinations.[12] Of 13 regions in the world identified by a WTTC February 1999 Report, the Caribbean is defined as being most economically dependent on tourism.

World tourism is expected to continue the positive trends that have marked the industry in the past decade, and the next twenty years is expected to hold a steady annual growth. According to the UN World Tourism Organization's (UNWTO) *Tourism 2020 Vision*, international arrivals are expected to grow by 4.1 % between 1995 and 2020. While East Asia and the Pacific, South Asia and Africa are forecasted to record growth rates of over 5% p.a., it is anticipated that Europe will maintain the highest share of world arrivals although there will be a decline in share from 60% in 1995 to 46% in 2020.

In 2008 international tourist arrivals grew by an estimated 1.9% over 2007 to reach 922 million. UNWTO's Tourism 2020 Vision forecasts that international arrivals are expected grow by 4.1 % p.a. between 1995 and 2020 to reach 1.56 billion by 2020. Of these, 1.18 billion will be intraregional, and 377 million will be long-haul travelers. It is projected that long-haul travel will grow faster, at 5.4% p.a. than intraregional travel, at 3.8% p.a. Europe will continue to maintain the highest share of world arrivals although there will be a decline in share from the 60% share in 1995 to 46% in 2020.

2.3.2 Tourist Arrivals by Region

The projected total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia. East Asia and the Pacific, Asia, the Middle East and Africa are forecasted to record growth at rates of over 5% per year, compared to the world average of 4.1%. The more mature regions – Europe and Americas – are anticipated to show lower than average growth rates (see Table 8). Long-haul travel worldwide will grow faster, at 5.4 % per year over the period 1995-2020, than intraregional travel at 3.8 %.

Table 8: Projected International Tourist Arrivals By Region to 2020 (million)

	Base Year	Forecasts		Market share (%)		Average annual growth rate (%)
	1995	2010	2020			
	(Million)			1995	2020	1995-2020
World	565	1006	1561	100	100	4.1
Africa	20	47	77	3.6	5.0	5.5
Americas	110	190	282	19.3	18.1	3.8
East Asia and the Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2

Source: UNWTO Tourism 2020 Vision

[12] UNWTO World Tourism Barometer, Vol.7, No. 2, June 2009.

2.3.3 Travel Motivation

It is also recognized that travel motivation has changed and a tourism product that only focuses on marketing 'sun, sea and sand' may not be sustainable in the changing marketplace. The industry has therefore been changing to respond to the growing needs and changing tastes of consumers/visitors which has caused a shift from the practice and marketing of 'active holidays' to the promotion of 'holidays as an experience.' This has so far expanded the competition and aided in the diversification of the global tourism offerings. For example, Edwards (1987) has pointed to a shift in the future from sun, sea and beach tourism to more active and culturally satisfying sightseeing. Thus market segmentation and product differentiation will be important in order to maximize tourism revenue. Factors spurring growth are: the desire for more individuals to travel, the internationalization of work and technical change which have made air travel easier and cheaper. In addition, there has been in some areas a decline in barriers to travel with the setting up of mega trading blocs.

2.3.4 Diversification of Travel Markets

Emerging Markets: According to the World Tourism Organization tourist visitor arrivals, which were 922 million in 2008, are expected to increase to approximately 1.6 billion by 2020. Increases in disposable incomes and the growing appetite for travel by citizens of Europe (particular Eastern Europe/Former Soviet Republic countries), the Middle East, East Asia and the Pacific, are expected to fuel global travel growth. China alone is expected to generate 100 million outbound tourists by 2020, up from less than 15 million currently.

Youth Travel Market: The travel age cohort with the most prospects for marketing and promotion is the youth market, which until now has not been the focus of the industry as many destinations do not market to this segment. Young travelers, aged 16-24, are the travel industry's fastest growing sector, representing more than 20% of all international travelers. This trend will continue, and may affect how travel and leisure is marketed, especially how it is packaged with a diversified entertainment product/service.

Holistic Tourism: As consumer taste and behaviour changes, there is an increased appetite for alternative tourism offerings and an increasing trend towards the demand for holistic treatment in tourism. This can be seen as part of the Health and Wellness Tourism wave that has emerged over the past five years. The UNWTO and stakeholders within the industry have seen a demand for detox treatments (purging of emotional, physical and mental toxins), spa retreats (spiritual and wellness retreats), and family retreats (making tourism a family experience).

Eco-Tourism & "Going Green": A 2007 Trip Advisor survey of over 1,000 travelers worldwide has found that approximately 38% of those surveyed had stayed in an eco-friendly hotel, and about 40% consider the environment when making travel plans. The survey also found that 66% believe that environmentally-friendly measures in travel are making a difference.[13] Visitors are increasingly interested in 'going green', with green spas, 'natural', 'organic', 'holistic', 'green', 'eco friendly' and 'sustainable' becoming the new trendy words in international tourism and travel.

2.3.5 Cruise Travel Demand

The world cruise industry has experienced positive results in the past five years with the number of passengers steadily on the rise. In 2006 about 12.1 million passengers took cruises to about 500 ports, and this increased to 13.2 million in 2008.[14] The Caribbean remains the main cruise destination, accounting for 38.2% of all itineraries.[15] Also, the past years have seen cruise lines investing in the construction of 30 new ships at a cost of US$15.2 billion for delivery through 2010, adding 74,000 berths. Carnival Cruise Lines will continue to dominate the industry, while the introduction of mega cruise liners will impact on port facilities in terms of size, capacity and security among other areas.

A number of factors suggest the future health of the cruise industry. These include: continued year-on-year passenger volume growth; an increasing range of cruise types and itineraries; increased affordability of cruises in key markets; introduction of ever-larger cruise ships with more passenger facilities; continued propensity for global leisure travel; the changing image of cruises; and the increasing economic wealth in populous Asian economies.

2.3.6 Air Travel Demand

Total worldwide air passenger traffic reached an all time high in 2007, when approximately 4.7 billion passengers used the world's airports, an increase of 6.9 % over 2006.[16] The *ACI Global Traffic Forecast 2007* looks out even further and predicts passenger numbers more than doubling over 2006 levels by 2025. The demand for air travel is on the rise, and there is also an increasing use of low-cost, no-frills airlines.

2.3.7 Other Travel Market Trends

Information and Communication Technologies (ICTs) and Online Travel: Advances in, and the greater use of Information and Communication Technologies (ICTs) have had a tremendous impact on travel and tourism, and will continue to do so. The multimedia capability of ICTs, and the internet in particular, have revolutionized travel, and leisure is marketed, distributed and booked by creating the possibility of greater customization, which in turn drives the demand for individual travel. The online travel business generated $80 billion in revenue in 2006. It has increased an average of 28% a year since 2002. By 2010, EMarketer estimates that online travel sales are expected to reach $146

[13] TripAdvisor, *Sustainable Travel:TripAdvisor Survey*, tripadvisor.com, April 2007
[14] Sourced from Cruise Line International Association (CLIA) and the Florida Caribbean Cruise Association.
[15] Florida Caribbean Cruise Association, *Cruise Industry Overview 2008.*
[16] Airports Council International.

billion annually, and that 41.3 million U.S. households will book travel on the Internet, representing 52.5% of all households with online access. The European travel market also is expected to increase by another 44% to approach EUR 55 billion in 2008.[17] As of 2006, the UK with 34% and Germany with 20% accounted for more than half of the European online travel market in 2006.

Travel Permit Restrictions: The events of September 11, 2001 (9/11) and other acts of terrorism began a process of change in cross-border policies, particularly in North America, that have brought about reorganizations in the global travel trade logistics and security. The calls for visa restrictions and permits in several quarters, and the increased security mechanisms may very well have a negative impact on travel, especially on the tourism dependent economies of the Caribbean.

2.3.8 Climate Change

Global warming is expected to play a major role in how the tourism and travel industry develops and operates. Best practices in coastal and marine preservation, ecological management, and waste management systems need to become priorities in the industry. The preservation of coral reefs, cruise waste disposal systems, drainage in resort areas, wetlands and deforestation concerns in development of resorts, among other things, are factors of which the industry must become more aware. Issues of changing climatic conditions on resorts, the environmental costs of air travel and the potential impact of rising sea levels on shoreline developments all show how important it is for proper planning, monitoring and policy mechanisms to ensure sustainability in the tourism industry.

2.4 Tourism and Sustainable Development

2.4.1 The Tourism System

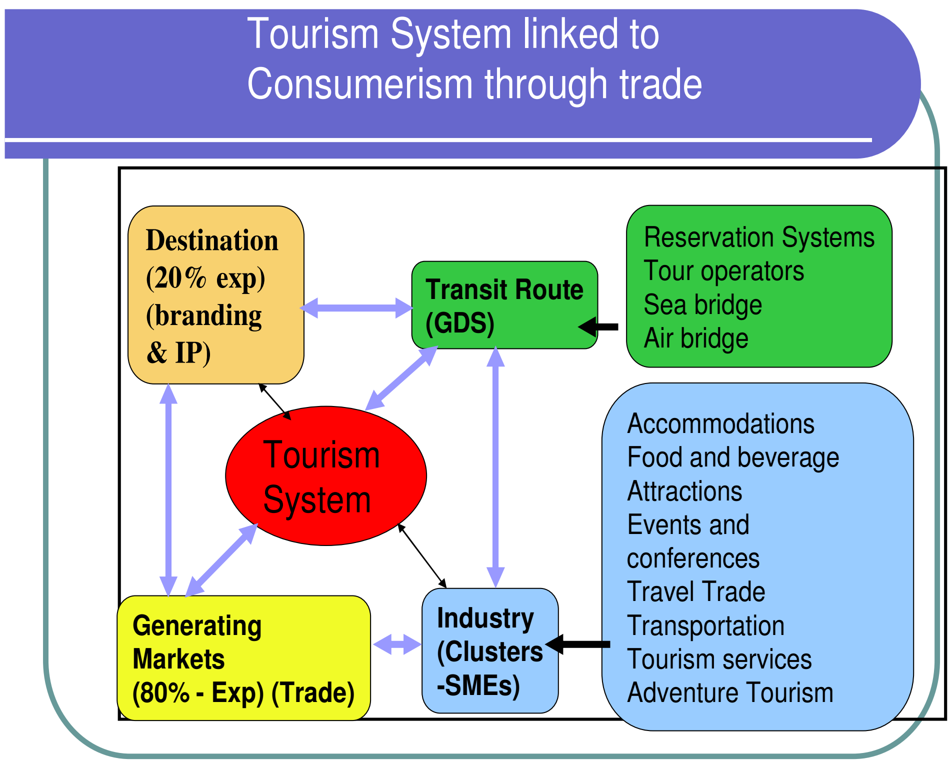
Tourism is a dynamic open system consisting of many interrelated sectors and firms which serve the tourist market. It is generally held that the tourism system is composed of four elements: tourists of the generating regions; the transit routes; the destination; and the industry, which are interwoven in functional and spatial relations (Lieper, 1979; Mill and Morrison, 1985; Liu, 1994.) The main components of the tourism system are presented in Figure 5 below. Liu also concludes that the system is like a web and for maximum effect all parts must be harmonized, with tourism development representing a dynamic process of matching tourism resources to the demand and preferences of actual or potential tourists.

The tourism sector of any country is located within the international tourism system, and the ability of the national tourism sector to leverage its position within the system will

[17] Source: Carl H. Marcussen – Centre for Regional & Tourism Research, May 2007.

influence the degree to which the sector can contribute to national development. For Jamaica, the tourism system offers the opportunity for a positive response to globalization by developing unique products offered to the generating market based on data capture and analysis. The ultimate result is access to not only in-bound tourism market segments but also to global out-bound tourism markets and general markets for Jamaican goods. Innovation and creativity are the hallmarks for maximizing the system.

As shown below, the generating markets for tourist arrivals represent the major source of revenues, while the destination can capture an increasing share of revenue through the use of destination branding and intellectual property, strategies that are particularly valuable for Jamaica given the strength of its nation brand and creative industries. Information represents a key asset by which a tourist destination can use the system to increase the value of its tourism sector, for example by coupling data on reservations and visitor preferences with merchandising and destination marketing strategies.



Source: Carolyn Hayle (2006) Framework for Caribbean Sustainable Tourism

Figure 5: The Tourism System

The phenomenon of globalization also is relevant to the positioning of small destinations within the international tourism system. While advances in transport and telecommunications are facilitating greater levels of global travel, the increasing consolidation of ownership structures within the global travel and tourism industry, including hotel chains, tour operators and cruise lines, present greater challenges for individual destinations to negotiate beneficial arrangements that reward their national economies.[18] Simultaneously, the progressive liberalization of trade regimes including under the General Agreement on Trade in Services (GATS) and the Caribbean Single Market and Economy (CSME), while providing potential benefits through greater access to external markets, also expose local enterprises to greater competition in their domestic markets.

The importance of ensuring greater benefit from the tourism sector may be highlighted by the comparison of net tourism revenues to national population. While Jamaica is among the regional leaders in the level of its annual tourism arrivals, as highlighted above, research done by Jayawardena and Ramajeesingh indicates that the per capita net tourist receipts for four Caribbean countries ranged from a high of US$4,649 in Aruba to a low of US$281 for Jamaica.[19] Strategies for increasing these net benefits may include: improving sector profitability by reducing business costs; reducing leakages; increasing local ownership and participation in the industry; and increasing net earnings per visitor arrival through targeting higher income market segments and employment of pricing and yield management strategies.

2.4.2 International Competitiveness

The Travel & Tourism Competitiveness Index (TTCI) is a measure developed by the World Economic Forum that aims to measure the factors and policies that make the T&T sector relatively more or less competitive in different countries. The TTCI is composed of 14 "pillars" of T&T competitiveness which are organized into three subindexes that capture the broad categories of variables that facilitate or drive T&T competitiveness as follows:

<u>Subindex A: T&T regulatory framework</u>

1. Policy rules and regulations
2. Environmental sustainability
3. Safety and security
4. Health and hygiene
5. Prioritization of Travel & Tourism

<u>Subindex B: T&T business environment and infrastructure</u>

6. Air transport infrastructure
7. Ground transport infrastructure
8. Tourism infrastructure
9. ICT infrastructure
10. Price competitiveness in the T&T industry

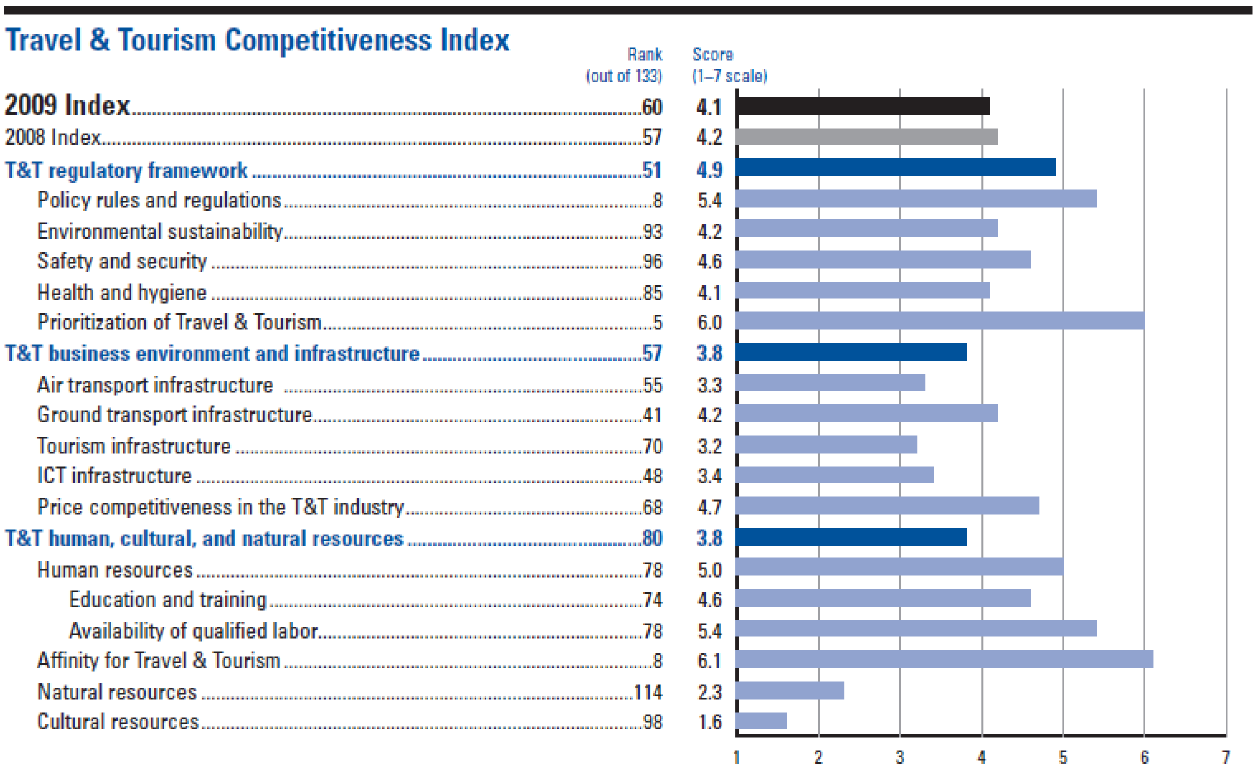
<u>Subindex C: T&T human, cultural, and natural resources</u>

11. Human resources
12. Affinity for Travel & Tourism
13. Natural resources
14. Cultural resources

[18] See for example Boxill and Alleyne (2005).
[19] Quoted in Hall and Holding (Editors) (2006) p. 304.

Each of the pillars is made up of a number of individual variables, which are based on both hard data from publicly available sources, international T&T institutions, and T&T experts (for example, IATA, ICAO, UNWTO,WTTC, UNESCO) and survey data from the World Economic Forum's annual Executive Opinion Survey.

As shown below Jamaica ranked 60th out of a total of 133 countries in the 2009 Travel & Tourism Competitiveness Index (as compared to 48th out of a total of 124 countries in 2007). Jamaica's most favourable rankings were in the areas of policy rules and regulations, prioritization of T&T strategies and affinity for travel & tourism, while the country was ranked poorly in the areas of safety and security and environmental sustainability. It should be noted that the island's relatively low scores for natural and cultural resources are based on the specific variables used for these measures, namely the number of World Heritage sites, protected areas, total known species, number of international fairs and exhibitions and creative industries exports. These are areas which should be improved if Jamaica is to take greater advantage of the growing trends in eco-conscious and heritage travel.



Source: Travel & Tourism Competitiveness Report 2009

Figure 6: Travel & Tourism Competitiveness Index

As Table 9 indicates, Jamaica holds a competitive position with respect to its main rival destinations in the region. However, the country should continue to seek improvements in its regulatory framework and its business environment and infrastructure to achieve improvements in the international competitiveness of its tourism sector, while addressing over time those factors which can improve its human, cultural and natural resources.

Table 9: Travel & Tourism Competitiveness Index Comparisons 2009

Country	Overall Index		Subindexes					
			Regulatory Framework		Business Environment and Infrastructure		Human, Cultural and Natural Resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Barbados	30	4.77	19	5.47	29	4.62	45	4.21
Costa Rica	42	4.42	48	4.94	55	3.77	31	4.54
Mexico	51	4.29	80	4.34	62	3.66	13	4.87
Jamaica	60	4.13	51	4.85	57	3.76	80	3.76
Dominican Republic	67	4.03	54	4.75	71	3.46	68	3.88
Trinidad and Tobago	84	3.75	100	4.04	51	3.82	112	3.38
Guyana	102	3.50	94	4.14	111	2.68	88	3.66

Source: Travel & Tourism Competitiveness Report 2009

There have been a number of initiatives designed at improving the competitiveness of Jamaica's tourism sector, including the Jamaica Cluster Competitiveness Project launched in 2002, which sought to develop a cluster of tourism activities that were also linked to clusters in agribusiness and entertainment, for example through the *Tastes of Jamaica Tours* and the *Where the Hits Are Made Tour*.

2.4.3 Tourism and the Environment

Tourism can cause a wide range of environmental and other impacts which must be addressed in planning for the long-term sustainable development of the sector. The potential negative environmental impacts include: soil erosion; loss of wetlands and mangroves as a result of the construction of resorts and hotels; damage to beaches and coral reefs; habitat loss and other pressures on biodiversity; intensive use of water resources; and increased pollution through air emissions, noise, solid waste, sewage, chemicals, and aesthetic pollution. Other physical impacts may be caused by tourism-related land clearing and construction, and soil and vegetation trampling from hiking. Expansion of the tourism product in coastal areas makes sustainable development more difficult by increasing pressures on coastal ecosystems that are already severely stressed. During construction of coastal accommodation and other tourism facilities, destruction and damage of ecosystems e.g., mangroves, sea-grass beds and coral reefs, may occur. During operations, there is often over-use of natural resources e.g., freshwater, pollution and other environmental impacts.

Negative socio-economic impacts of tourism can result from change or loss of local identity and values, enclave tourism, resource use conflicts, or other effects that result when the social and cultural carrying capacity of a tourist destination are exceeded. The extreme manifestations of these negative impacts may include crime generation, child labour, prostitution and sex tourism. The negative impacts of tourism may occur at three levels: developmental, operational and recreational. Whereas some of these impacts (e.g.

erosion and pollution) are caused by large numbers of visitors, some environmental damage may be caused by the lack of plans, policies and actions to manage growth in the destination areas. In planning for the long-term development of the tourism sector in Jamaica it will be vital to address these potential environmental and socio-economic impacts. The establishment of the Environmental Foundation of Jamaica (EFJ) in 1993, based on a debt-for-nature swap between the governments of the United States and Jamaica, has provided a long-term mechanism for the funding and implementation of a range of projects supporting community-based tourism, botanical gardens and national parks and protected areas. The application of best practices in sustainable tourism at the sector and enterprise levels will be important in addressing a range of environmental challenges.[20]

In particular, as the negative effects of mass tourism on the environment become more evident, alternative forms of tourism have become more important for the long-term future of small island states such as Jamaica, including:

- Ecotourism
- Responsible Tourism
- Science Tourism
- Ethical Tourism
- Environmentally-Friendly Travel
- Green Tourism
- Sustainable Tourism

The development of these alternative forms should consider a number of issues including policies directed towards increasing the quality as well as quantity of environmentally friendly facilities, development of the potential of low-impact tourism, ensuring that tourism development is appropriate to the environmental setting, and the fact that ecotourism requires special site, area and regional planning. It also should be recognized that nature-based tourism is not automatically ecologically sensitive and requires careful planning to ensure that the desired outcomes are achieved.

Costa Rica provides an appropriate example of a country that has successfully developed these alternative tourism models. In the 1970s and 1980s, up to 17 million hectares of rain forests were lost each year as a result of deforestation in Costa Rica. Following its introduction in the mid-1980s ecotourism has been one of the most dynamic sectors in the economy generating up to 36% of net tourism earnings. The eco-tourism attraction of Costa Rica is enhanced by the rich and vibrant ecological systems that are abundant with high levels of endemic flora and fauna. However, the development of ecotourism in Costa Rica also required conscious policies and regulations to support a national park and protected area system and ensure minimal negative impact on the environment, such as trail erosion. Measures also have been taken to mitigate the socio-cultural considerations including the effect that increased numbers of tourists have on local communities, to ensure that the net impact of ecotourism on Costa Rica's environment has been positive.

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[20] See for example Rainforest Alliance *Guide for Sustainable Tourism Best Practices* and *Directory of Best Practices, Certification and Codes of Conduct for Sustainable Tourism* @ www.rainforest-alliance.org.

2.4.4 New Tourism

In 2003, following the third Global Travel & Tourism Summit, the World Travel and Tourism Council developed the *Blueprint for New Tourism* as a new vision strategy for global travel and tourism based on greater partnership between all industry stakeholders, public and private. The three (3) main tenets of New Tourism are:

1. Governments recognizing Travel & Tourism as a top priority
2. Business balancing economics with people, culture and environment
3. A shared pursuit of long-term growth and prosperity

Many of the specific recommendations under the Blueprint for New Tourism seek to make the tourism industry more compatible with sustainable development, including: investment in suitable infrastructure and human capital development; creation of a competitive business environment; protection of natural resources and local cultures; development of public-private sector partnerships; enhancing stakeholder participation and inclusiveness; and strengthening of proper land use and environmental planning in the development of the industry. The principles of New Tourism are broadly reflected in the current approaches to the development of the tourism industry in Jamaica, including in the Tourism Master Plan.

2.4.5 Tourism and Land Development Planning

In addition to environmental management, the long-term development of the tourism sector requires integrated land use planning to address a number of important issues including: resolving conflicting land use requirements between tourism and other sectors, including agriculture, housing and mining; planning for adequate economic and social infrastructure including transport, housing and utilities to support expansion of tourism accommodation and attractions; integration of environmental, hazard mitigation and sustainable development criteria into the design and construction of tourism facilities; strengthening the approval process and enforcement of planning approvals and environmental licences and permits; and implementation of best practices in stakeholder participation in sustainable development planning at the local level for resort areas. Many of the social and environmental problems in resort areas such as Montego Bay, Ocho Rios and Negril are the result of poor planning, which has tended to focus on the tourism plant rather than the people and communities. As indicated below, tourism development should include local communities at the centre of the process. In this respect a good model is provided by New Zealand, especially the South Island, where the resort areas fully integrate local communities into the planning and development process.

2.4.6 Tourism and Small Island Developing States (SIDS)

The impact of tourism on sustainable development is magnified for small island developing states (SIDS), both in its potential contribution to economic development and to degradation of the environment on which the sector is so dependent. Tourism development is capital- and space-intensive and should be carefully planned, particularly in relation to other land uses, management of water resources and coastal zones and the development of parks and protected areas. The Barbados Programme of Action for SIDS, to which Jamaica is a signatory, calls for small island developing states to undertake a number of steps as set out below.

- Adoption of integrated planning and policies to ensure sustainable tourism development, with particular attention to land-use planning and coastal zone management
- Requiring environmental impact assessments for all tourism projects
- Monitoring of the environmental impact of all tourism activities
- Development of guidelines and standards for environmentally sustainable design and construction of tourism facilities that also take into account the carrying capacity of tourism areas
- Identification and development of facilities to meet niche markets in eco-tourism, nature and cultural tourism
- Involvement of local populations in the identification and management of natural protected areas reserved for eco-tourism
- Adoption of measures to protect the cultural integrity of SIDS
- Participation in regional and international actions to support sustainable tourism[21].

The International Meeting to Review the Implementation of the Programme of Action for the Sustainable Development of Small Island Developing States in Mauritius in 2005 also called on SIDS, including Jamaica, to establish an appropriate balance between tourism development and that of other sectors of the economy including development of appropriate linkages to other sectors such as agriculture. Other recommendations for SIDS are: to implement the guidelines on biodiversity and tourism development adopted by the Convention on Biological Diversity; to develop and implement sustainable tourism development plans in partnership with all relevant stakeholders including the private sector; to integrate these plans into their national strategies for sustainable development; and to develop and implement community-based initiatives on sustainable tourism.[22] These recommendations are relevant to the long-term planning for the tourism sector in Jamaica.

2.4.7 Hazard Mitigation

The tourism sector in Jamaica is particularly vulnerable to natural and man-made hazards. The main tourism plant and infrastructure is located in coastal zones that are susceptible to wave damage, coastal inundation from storm surge and tsunamis, and whose vulnerability has been increased by removal or damage to protective ecosystems including reefs and wetlands. The sector is also vulnerable to a wide range of other risks, including: wind damage and flooding from tropical storms and hurricanes; earthquakes; public health threats; long term effects of climate change including rise in sea levels; and possible terrorism attacks on perceived “soft targets”. The tourism sector is not integrated into national response and recovery systems and generally lacks the capacity to manage broad hazard mitigation and communication strategies.

[21] United Nations Division for Sustainable Development (1994).
[22] UN (2005).

The Multi-Hazard Contingency Planning Manual for the Caribbean Tourism Sector prepared by the Organization of American States (OAS) and Caribbean Disaster Emergency Response Agency (CDERA) provides detailed guidelines for preparation for hazards including hurricanes and terrorist incidents which will be important considerations in hazard mitigation planning for the tourism sector in Jamaica.[23]

2.4.8 Tourism, Society and Governance

Tourism depends on a wide range of stakeholders for its development and performance. The involvement of stakeholders in the planning and operation of the sector enhances the prospects for sustainable tourism. As declared by Agenda 21, "One of the fundamental prerequisites for the achievement of sustainable development is broad public participation in decision-making."[24] In Jamaica a number of organizations exist which provide mechanisms for stakeholder participation and governance including the local chapters of the Jamaica Hotel and Tourist Association (JHTA), the Resort Boards established in each resort area, Parish Development Committees which have been established with varying degrees of success in a number of parishes over the past decade, as well as community-based organizations. Recommendations for the sustainable development of tourism include strengthening local government, establishment of transparent and participatory mechanisms for stakeholder involvement in decision-making, and partnerships between the public sector, private sector and civil society.[25] These existing organizations provide a framework for developing appropriate governance mechanisms for the tourism sector in Jamaica.

2.5 Issues and Challenges

The tourism sector in Jamaica needs to address a number of key issues in order to sustain long-term growth, including the following:

2.5.1 Product Improvement for Long-Term Competitiveness

Jamaica has already demonstrated its ability to compete successfully in world markets as a tourism destination. However, in order to maintain market share against its competitors in the region, including the Dominican Republic, Mexico and Cuba, Jamaica will have to continue to invest in improving key aspects of its tourism product, including:

- Product development, including improved standards of small hotels, villas, apartments and guesthouses, upgrading of customer service, and introduction of a grading system for tourism accommodation facilities
- Upgrading of infrastructure in resort areas, including road access, water supply, sewage treatment and solid waste disposal
- Training and human resource development

[23] OAS/ CDERA (2007).
[24] UN Conference on Environment and Development (1992).
[25] United Nations Department of Economic and Social Affairs (2002).

- Diversification of the accommodation sub-sector including development of convention-type hotels
- Development of additional tourist attractions including attractions based on ecological, cultural and heritage resources
- Consideration of the issues involved in the potential introduction of casino gambling to Jamaica
- Reduction in crime and tourist harassment
- Support for small hotels and properties including assistance in marketing, training and access to finance

2.5.2 Market Development and Diversification

Jamaica faces the challenge of increasing its earnings from its tourism industry, which may be achieved in either or both of the following ways: i) increasing the total number of arrivals; ii) increasing the average earnings per arrival. In addition to increasing the number of visitor arrivals over time within the carrying capacity of the country, the sustainable long-term development of the tourism industry also should include strategies to earn and retain higher value for the country from each tourist arrival. These strategies may include:

- Targeting upper-end stopover tourist market segments
- Expanding facilities for yachting, nautical tourism and related market segments
- Targeting longer stay tourists including from European countries
- Developing tourism based on specific resources including environment, cultural and heritage tourism, community tourism, sports tourism, and tourism based on the entertainment resources of the country
- Developing other market segments which represent growing markets based on international demographic trends and in which Jamaica possesses competitive advantages, including medical tourism and sport tourism

2.5.3 International Trends and Market Access

Jamaica's tourism industry also will face the potential challenges that come from its integration with the world tourism industry including:

- The potential impact on international travel by future terrorism events or other political developments
- The potential increases in the cost of air travel based on its environmental costs through mechanisms such as taxation of jet fuel[26]
- Maintaining air access and airlift capacity to Jamaica despite reductions in the capacity of Air Jamaica
- Need for continued international marketing aimed at improving perceptions of Jamaica as a travel destination

[26] As is presently done in the Netherlands.

2.5.4 Environmental Sustainability

As described above, tourism can cause a wide range of environmental and socio-economic impacts which must be addressed in planning for the long-term development of the sector, including the following:

- Studies to determine the carrying capacity of the main resort destinations in the island in terms of waste management, water demands, housing and other amenities, and the impacts of resort development on flora, fauna, natural habitats and aesthetically important natural landscapes.
- Public awareness campaigns for decision-makers at all levels, from the local authorities to the technical staff of regulatory agencies
- Environmental management systems for the tourism industry
- Green certification of tourism visitor accommodation facilities and attractions
- Encouragement of attractions that place an economic value on environmental conservation, such as bird-watching

2.5.5 Land Use and Regional Planning

The development of the tourism sector also will require careful land use and regional planning including the following:

- Improvement of the application process for planning and building approvals and environmental permits and licenses
- Long-term planning to provide adequate housing and transportation infrastructure for growth areas in resort destinations
- Coordination of land use planning at parish and national levels
- Adherence to parish development orders and local sustainable development plans, where they exist

2.5.6 Economic Linkages

While the tourism sector is a major earner of foreign exchange there is a relatively high leakage of these benefits through imports of goods and services and payments of interest and investment income to overseas providers of capital.[27] In order to retain more of the value added by the tourism sector, the National Development Plan must seek to enhance the linkages between tourism and the other sectors of the economy, including agriculture, manufacturing and services, with consideration of the following approaches:

- Development of local agricultural production targeted at import substitution for hotels and other tourism facilities that meet requirements for quality, standards and consistency of supply
- Encouragement of organic agriculture as an emerging demand
- Encouragement of procurement of goods and services from local suppliers based on competitive bidding

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[27] It has been estimated that the leakage rate may represent over 50% of tourism earnings (see Seaga in Hall and Holding (Editors) (2006) pp. xxxii-xxxiv).

- Customizing production to meet specific needs of tourism sector including for safety, hygiene and convenience of use
- Promotion of community-based tourism also increases linkages with the local economy
- Continued development of the cluster approach to enhancing competitiveness and linkages between tourism and other sectors including agribusiness and entertainment

2.5.7 Inclusiveness

The promotion of greater inclusiveness in the tourism sector has been included as a specific goal under the Tourism Master Plan, to counter the development of tourism as an enclave industry and to widen the share of benefits derived from the sector by local residents and communities. The challenges in promoting greater inclusiveness in the tourism sector include:

- Development of capacity and supporting infrastructure at the community level
- Promotion of appropriate tourism marketing and management models
- Strengthening stakeholder participation in local governance and decision-making for the sector

2.5.8 Measurement and Monitoring

Despite its importance to the Jamaican economy, tourism does not presently appear as a separate sector within the national accounts of the country. In addition, despite the annual statistics prepared by the JTB there remain gaps in information on various aspects of the industry. Under the adoption of the United Nations System of National Accounts (UNSNA or SNA93 for short) for Jamaica, the introduction of a Satellite Account for the tourism sector will allow collection and analysis of data on the sector that will facilitate systematic measurement and monitoring of the sector, and improve the ability to evaluate its economic impact and plan for its long-term development.

3. SWOT Analysis

A standard tool of strategic analysis is SWOT analysis, which seeks to identify the main strengths, weaknesses, opportunities and threats for a given entity, ranging from a nation to a sector to an individual enterprise. For the Tourism Sector in Jamaica, the identification of strengths and weaknesses represents the internal assessment of the sector while the consideration of opportunities and threats represents the analysis of the external environment for the sector.

The SWOT analysis, along with the Situational Analysis, form the basis for identifying goals, objectives and strategies that may be employed to apply the strengths and address the weaknesses of the sector, and capitalize on the opportunities and mitigate the threats to the long-term development of the sector.

The SWOT analysis for Jamaica's Tourism Sector is presented in Table 10 below. The Analysis is structured around the three groupings of sub-sectors given below, based on the CTO classification of the tourism sector:

1. Accommodation and Food and Beverage Sub-Sectors
2. Attractions, Adventure Tourism and Events and Conferences Sub-Sectors
3. Transportation, Travel Trade and Tourism Services Sub-Sectors

Table 10: SWOT Analysis for Tourism Sector

INTERNAL ANALYSIS	
STRENGTHS	**WEAKNESSES**
ACCOMMODATION AND FOOD AND BEVERAGE SUB-SECTORS	
• Brand name of Jamaica – culture, built and natural heritage, people and mystique – which contributes to demand for tourist stopover visits • Growing room accommodation base • Strategic geographic location for North American market • Vertically integrated foreign operators of hotels provide increased marketing strength in international markets • English speaking destination provides advantage to North American and UK stopover markets • Improved infrastructure in some areas to support tourism accommodation base including highways, airports,	• Growing room accommodation base without adequate development of commensurate comprehensive infrastructure and support services • Significant reduction in performance of medium to large EP and boutique properties in favour of all-inclusives • Environmental problems resulting from growth of accommodations base, including waste water, sewage, beach erosion and loss of coral reefs • Increased demands on local infrastructure – transportation, water supply, waste water collection and treatment, solid waste disposal and health care facilities • Additional pressure placed by tourism on the coastal zones, areas already heavily used for ports and harbours, commercial fisheries and urban expansion

telecommunications • Wide range of accommodation types • National airline supports airlift for stopover arrivals • Large pool of trainable persons • Attractive investment climate for overseas and local investors • Strong appeal of Jamaican cuisine • Sub-sector is major contributor to foreign exchange earnings • Established quality standards for accommodation facilities • Strong all-inclusive brands including locally-owned brands (Sandals, SuperClubs, Couples)	• Hotel design often blocks visual access and not tempered by the surrounding natural environment • Land use for hotel construction often conflicts with other uses such as fisheries • Reduction of public access and ownership of key beach front and shoreline lands • Erosion resulting from uncontrolled clearing and infrastructure construction • Destruction of wetlands and other unique or sensitive habitats during construction • Competition for beach and other off-shore uses • Inadequate development of campgrounds • Limited quality, diversity, authenticity of entertainment, art and craft, and product offering generally in accommodations • High cost of doing business including utilities, security, labour costs (higher than some competitors), tax structure, bank charges • Insufficient low interest loans , especially for smaller properties and food and beverage entities • Poor hygiene practices in some communities • Insufficient number of adequately trained workers, including middle and upper level technical and management and culinary skills • Inadequate space at tertiary level training institutions to meet demand of tourism accommodations sub-sector • Poor oral communication skills of staff • Poor customer service skills • Inadequate foreign language skills • Inadequate supply of organic foods to meet demand • Inhospitable working hours and conditions • High level of staff attrition in sub-sectors • Inadequate use of culture and heritage to enhance accommodation product • Insufficient use of Jamaican design and material • Lack of appropriate regulatory framework for timeshares • Impact of all-inclusives in reducing patronage of local restaurants and shops • Insufficient benefits to communities, and limited encouragement of entrepreneurship and employment • Inadequate consumer marketing by public and private sector • Inadequate exploitation of linkages between tourism and other sectors • Foreign recruitment of skilled labour e.g.,

	housekeepers, life guards, F & B personnel • Inadequate pool of skilled persons within wider society • High dependence on one major market viz. North America
ATTRACTIONS, ADVENTURE TOURISM, EVENTS AND CONFERENCES SUB-SECTORS	
<u>ATTRACTIONS</u> GENERAL STRENGTHS • Many existing attractions which provide basis for expansion of sub-sector • Significant number of NGOs and private sector organizations that focus on supporting implementation • Existence of regulatory framework for attractions including health, fire, safety and security • Many partially developed and undeveloped sites MUSEUMS & GALLERIES • Abundance of information, resources and potential exhibits available HERITAGE HISTORICAL SITES AND PARKS • Abundance of heritage e.g. multi-ethnicity/cultures and different periods in history leading to several potential heritage historical sites and parks BOTANICAL GARDENS • Several long-established botanical gardens still exist (Hope, Bath, Castleton) • A number of private gardens also exist	<u>ATTRACTIONS</u> GENERAL WEAKNESSES • Lack of proper coordination among monitoring and implementing agencies • Carrying capacity for attractions not established not adhered to by most implementing bodies • Limited planning and management skills in relevant organizations developing and managing attractions • Inadequate enforcement of environmental regulations regarding attractions development • Inadequate monitoring and enforcement of environmental impacts • No specific tourism attractions regulations • Product development agency does not have the legislative framework needed to effect change within the industry • Limited easily sourced one stop information about events • Limited foreign language skills e.g., French, Spanish MUSEUMS & GALLERIES • Few properly developed HERITAGE HISTORICAL SITES AND PARKS • Poorly financed and underdeveloped sub-sector • Heritage is undervalued by Jamaicans • Commodification of heritage threatens the authenticity of Brand Jamaica BOTANICAL GARDENS • Insufficient funding from private and public sector leave gardens poorly maintained • Limited appreciation for the resource leading to inadequate support • Lack of education, information, public awareness and understanding

INTERPRETIVE CENTRES	INTERPRETIVE CENTRES • Very few and underdeveloped
CULTURAL HERITAGE TOURISM • Rich in culture and heritage • Rural communities are especially strong in cultural heritage	CULTURAL HERITAGE TOURISM • Some aspects of our heritage are being lost due to lack of interest by youth and inadequate transmission of knowledge/skills by adults • Cultural events often take place in rural settings that lack capacity for receiving tourists • Community members may not know how to capitalize on cultural heritage (e.g. Maroon communities)
CRAFT • Established Craft Vendors' Associations with reasonable influence • Stakeholder buy-in for change in sub-sector including vendors, producers, government and IDPs • Existence of training and capacity building institutions	CRAFT • Parish Council funding base is very limited • No distinct competitive advantage • Very poor physical/recreational infrastructure • Inconsistency in product and service quality • Craft producers lack adequate resources and financial support • Lack of product diversification and innovation • Weak, informal relationships with key industry stakeholders (cruise ship/tour operators) • Entrenched vendor culture • Limited understanding of craft market system • Lack of effective marketing and promotion
ECO-TOURISM • Existence of protected area systems - Blue & John Crow Mountains National Park e.g. Holywell, Blue Mountain Peak • Outstanding areas of biodiversity including Cockpit Country and Negril Royal Palm Reserve • Outstanding scenery including landscapes and seascapes • High biodiversity and potential for wildlife viewing	ECO-TOURISM • Weak National Parks and Protected Areas System with limited funding • Very few recognized ecotourism attractions despite development potential • Limited awareness of cultural and heritage assets on the part of local people
NATURE TOURISM • Strong demand for nature tourism from international source markets • Many opportunities because of Jamaica's widely varying geography including waterfalls and rivers • Many nature based attractions are unique and	NATURE TOURISM • Lack of attention to preservation and sustainability of nature-based attractions • Limited capacity for monitoring exotic animals attractions • Risks of introduced invasive species to indigenous wildlife

long established • Outstanding scenery - landscapes and seascapes • High biodiversity and potential for wildlife viewing • Diversification of nature tourism attractions including exotic animal attractions	
ADVENTURE TOURISM	ADVENTURE TOURISM
GENERAL STRENGTHS: • Abundant opportunities and facilities that are fairly well developed island-wide	GENERAL WEAKNESSES: • Not as well regulated and coordinated as sub-sector should be • Inadequate information and publicity • Depend on natural settings that can be damaged by some adventure activities
GOLF/TENNIS FACILITIES • Several well developed facilities, often associated with hotels	GOLF/TENNIS FACILITIES • The establishment and operation of golf courses involve significant environmental impacts
PARKS AND GREEN SPACES • A range of parks exist within the national framework of parks and protected areas	PARKS AND GREEN SPACES • The Policy for a System of Protected Areas remains largely unimplemented • Limited public and private sector funding
FISHING & MARINE FACILITIES • Several exist including tournaments e.g. Marlin Tournament in Port Antonio	FISHING & MARINE FACILITIES • Inadequate marketing of facilities
HUNTING FACILITIES • Bird shooting facilities available in the appropriate regulated season	HUNTING FACILITIES • Limited range of suitable fauna
RECREATIONAL VEHICLES • Several locations with suitable terrain	RECREATIONAL VEHICLES • Need for appropriate facilities to operate • Inadequate monitoring and enforcement of standards and regulations
BIRDWATCHING • Large number of endemic and indigenous bird species, as well as migrants in the winter months	BIRDWATCHING • Limited numbers of highly skilled/trained guides • Inadequate linkages to local communities • Weak national parks and protected areas system
HIKING • Many locations with suitable terrain • Several established hiking trails islandwide,	HIKING • Opening trails may result in destruction of habitat and

some with historical/heritage aspects	opening up of areas for inappropriate development • Limited number of guides for hiking • Inadequate security for hiking • Inadequate maintenance of existing trails and waste disposal mechanisms • Weak national parks and protected areas system • Lack of signage and interpretation
WATER SPORTS • Many suitable locations • Carrying capacity studies for marine activities completed for main resort areas	WATER SPORTS • Main focus has been on diving but coral reefs are badly damaged • Weak national parks and protected areas system • Lack of zoning for different activities • Inadequate attention paid to dangers and environmental impacts of jet skis
<u>EVENTS & CONFERENCES</u> • High demand and strong support for events and conferences • Creative talent abundant for creative and cultural industries and events • Demonstrated ability to host world-class sports and entertainment events	<u>EVENTS & CONFERENCES</u> • Special events venues are limited and often lack proper facilities such as parking and other amenities • Noise pollution • Human resource deficiency including skills in coordination and management • Inefficiency in delivery of services • Limited capacity to enforce standards & regulations for events
TRANSPORTATION, TRAVEL TRADE AND TOURISM SERVICES SUB-SECTORS	
AIR TRAVEL • Ownership of national airline supports airlift for tourism sector • National carrier protected local travel agent • Team Jamaica training is a plus for the sector • Extensive taxi and ground transfer operations in support of airports • Strong charter support complementing scheduled carriers	AIR TRAVEL • National airline has operated at a loss for many years • Governance structure of national airline • Limited strategic alliances with airlines for airlifts • Insufficient airlifts out of markets other than North America • Limited funding for JAMVAC • Limited use of distribution channels by national airline • Poor domestic air links • Introduction of passport requirements for US travelers to the Caribbean
TRAVEL TRADE • Wide range of products with increasing attractiveness and marketability • Access to cheaper products	TRAVEL TRADE • Poor collaboration and communication within the industry • Limited effectiveness of marketing strategies
CRUISE INDUSTRY • Visa not required for home-porting	CRUISE INDUSTRY • Visa restrictions for inbound passengers to US

• Exemption from passport requirement for US tourists • Source of good quality water for cruise ships • Major cruise lines endorse destination • Local attractions growing alongside cruise industry • Geographic location in relation to other Northern Caribbean cruise destinations including Cuba, Cayman and Mexico • Geographic make-up of coast line with several harbours • Proximity of attractions to cruise ship ports • Good destination management	• On board pre-booked tours limit local market involvement • Weak collaboration between land-based operators and cruise lines • Tax regime • Inadequate levels and timeliness of communication between destination and lines • Impact of crime and harassment on disembarking cruise passengers • Limited purchases of local crafts • Inadequate public facilities in port towns • Environmental impacts of port development and operation
TOUR OPERATIONS (DMOs) • Pre-booked tours enhance earnings	TOUR OPERATIONS (DMOs) • Impact on transport associations and independent operators
GROUND TRANSPORT • Linkage to cruise market • Contracts with local corporate entities, schools and churches • Freelance customers • Role as goodwill ambassadors • Team Jamaica trained personnel	GROUND TRANSPORT • Competition from state transport (e.g. JUTC servicing domestic tourists) • Impact of harassment • Inadequate human resource capacity to utilize technology for marketing • Limited ability to organize and manage membership • Inability of charter operators to compete with more integrated operators including DMOs • Limited access to cruise business
U-DRIVE • Has ability to operate overseas • Benefits from existing concessions • New vehicles being operated	U-DRIVE • Competition strong from illegal operators • Franchise operations • Inconsistent policies toward sub-sector • Impact of high levels of crime on car rentals • Poor collaboration among elements of the sector • Insurance risk high
EDUCATION SERVICES • Available local research relevant to tourism • Team Jamaica training is a plus for the sector • Strong NGO community available as educational resource, e.g. BirdLife, Georgian Society, Natural History Society, environmental NGOs	EDUCATION SERVICES • Human resources • Inadequate management training • Limited socialization about other culture • Limited application of existing research • Lack of awareness of importance of preservation of the environment • Need expanded areas of research • NGOs under-utilized as service-providers in education

POLICY • Existing collaboration between public and private sectors • Adaptations to climate change • Competitive environment for sector development • Stakeholder collaboration • Concessions help industry • Cluster approach for competition OTHER • Increasing use of internet access as a distribution channel	POLICY • Insurance coverage onerous • Competition for market share between existing and new product segments • Absence of critical mass for competition in international markets • Need for improved attention to environmental protection and involvement of local communities in tourism development • Lack of adherence to aspects of core goals in implementation of Master Plan OTHER • Limited use of technology • Inadequate infrastructure and planning for sector • Lack of political will to enforce plans and regulations
EXTERNAL ANALYSIS	
OPPORTUNITIES	**THREATS**
ACCOMMODATION AND FOOD AND BEVERAGE SUB-SECTORS	
• Market demand for creative packaging of tourism product • Cruise passenger conversion trends • International donor assistance available for capacity building, product development and marketing • Renewed demand for timeshares • Growth in potential of new markets including China and India • Potential for expansion of existing markets including the Far East, Latin America and the Caribbean • Potential increased regional markets under CSME • Potential of special interest markets including health and wellness, sports, nature, bed and breakfast, farm vacations, and camping • Market demand for varied cuisine, entertainment and nightlife • Growing availability of additional marketing channels, e.g. internet • Demand for environmentally-friendly accommodation and products	• Growing room base relative to bookings and carrying capacity including infrastructure • Weak spatial planning including for hotel development • Weak enforcement of relevant laws • Inadequate housing for tourism workers • Weakness of economies of main source markets • Growing low-cost regional competition, e.g. Cancun, Dominican Republic, Cuba • Potential increased competition from other Caribbean destinations under CSME • Impact of high crime rate and tourist harassment • Negative image concerns relating to security • Poor environmental practices in sector • Vulnerability to multi-hazards including natural and health hazards, climate change etc. • Trade in services regimes • Inability to achieve policy and programme objectives

• Demand for organic foods • Potential for stronger linkages to agricultural and manufacturing sectors and strengthening of supply chain • Trade in services regimes • Business opportunities e.g. for expansion of tour operations and shopping	
ATTRACTIONS, ADVENTURE TOURISM, EVENTS AND CONFERENCES SUB-SECTORS	
ATTRACTIONS • Growth in market demand • Opportunity to learn from lessons learnt by other attractions elsewhere • Growing world market for heritage tourism especially with growth in the European market • Master Plan identifies this sub-sector as a key area for focus • Number of key heritage sites owned by Government • Places economic value on natural resource and heritage protection • Potential of interpretive centres to greatly enhance visitor experience and educate local people about heritage • Some craft markets can be marketed as Heritage sites • Diversified craft product development will improve revenue and profit generation • Opportunity to establish mutually beneficial alliances with key stakeholders • Potential to employ technology in product and service delivery for craft ADVENTURE TOURISM • Growth in market demand • Many opportunities for development • Relatively new area allowing wide scope for development • Ability to develop niche marketing strategies	ATTRACTIONS • Competition from existing sites in other regional destinations with established reputations etc. • Inappropriate development of attraction sites – particularly important as many of the attractions are nature-based and easily damaged or destroyed • Concerns about Jamaica's security image and crime situation • Weaknesses in infrastructure • Human resources training needed • Damage to natural and cultural heritage assets by mining, agriculture and housing development • Credible competition to crafts from in bond stores ADVENTURE TOURISM • Competition from existing sites in other regional destinations • Inappropriate development of adventure tourism sites – particularly important as many of the attractions are nature-based and easily damaged or destroyed • Increasing cost of insurance coverage due to risk of injuries associated with some types of adventure tourism • Impact of climate change and likely increase in multi hazards • Negative publicity associated with injuries

<table>
<tr><td>EVENTS & CONFERENCES
Growth in market demand
Rich heritage lends itself to event creation</td><td>EVENTS & CONFERENCES
Competition from other regional destinations
Can have high environmental impacts from waste generation, noise, water, energy demands, etc.</td></tr>
<tr><td colspan="2">TRANSPORTATION, TRAVEL TRADE AND TOURISM SERVICES SUB-SECTORS</td></tr>
<tr><td>Potential for adaptation to climate change e.g. Kyoto agreement
Opportunity to take advantage of globalization to increase market of competitive products
Favourable perception of country and Brand Jamaica
Demand for wider offering of retail duty free products
Opportunity to promote stopover destination as a complement to cruise ship market
Use of technology for marketing, e.g. Internet marketing</td><td>Climate change and its impacts
Impact of globalization on uncompetitive products and enterprises
Potential impact of crime and harassment on perception of country
Impact of rising oil prices
Multi-hazards
Illegal operators, many of whom are not exposed to other cultures
Potential increased competition from other Caribbean destinations under CSME</td></tr>
</table>

4. Strategic Vision and Planning Framework for Tourism Sector

The long-term process of planning for the Tourism Sector is guided by a Vision that describes a future for the sector that is desirable for its stakeholders and that can be achieved through their own efforts within a realistic time frame. The Sector Plan contains an overall Vision for the Tourism Sector, which is based on the National Tourism Policy and also reflects the contributions of the stakeholders represented on the Tourism Task Force and at stakeholder consultations held during the Vision 2030 Jamaica planning process.

4.1 Vision Statement

The Vision Statement for the Tourism Sector for Vision 2030 Jamaica is:

> ***"An inclusive, world-class, distinctly Jamaican Tourism Sector that is a major contributor to socio-economic and cultural development, with a well-educated, highly skilled and motivated workforce at all levels within a safe, secure and sustainably managed environment"***

4.1.1 Strategic Vision

The long-term strategic vision for the Tourism Sector in Jamaica is built on a number of fundamental elements, including the following:

i) A Tourism Sector that builds on the distinct competitive advantages provided by Jamaica's natural, human and cultural assets;

ii) A Tourism Sector that is characterized by inclusiveness with opportunities for broad participation by stakeholders;

iii) A Tourism Sector that is sustainably developed and managed to protect the natural and cultural assets on which the sector depends;

iv) A Tourism Sector that is internationally competitive and provides increased levels of benefit to the Jamaican economy and people;

v) A Tourism Sector that provides a safe, secure and satisfying experience for all visitors;

vi) A Tourism Sector that possesses the flexibility and creativity to adopt and adapt new technologies that may emerge over the long term;

vii) A Tourism Sector that is supported by greater awareness by the Jamaican public on the importance of Tourism to their daily lives.

This strategic vision is further expressed in the strategic planning framework for the Tourism Sector for Vision 2030 Jamaica outlined below.

4.2 Strategic Planning Framework

4.2.1 Strategic Approach

The strategic planning for Jamaica's Tourism Sector is based on the premise that the destination competes with a range of other Caribbean destinations that possess similar natural endowments of sun, sea and sand. Competing for mass tourism based on these natural endowments therefore represents the lowest common denominator for Caribbean tourism destinations, leading to competition based mainly on price and economies of scale.

Vision 2030 Jamaica therefore seeks to forge a more sustainable future for the island's tourism sector, based on the distinctive advantages that Jamaica enjoys. These advantages include: Jamaica's vibrant culture, music, and cuisine; a rich heritage; world-renown sporting prowess; and a range of ecological habitats and endemic species. These provide the basis for Jamaica to diversify its tourism product and develop new market segments, including: special events and promotions; sports tourism; yachting and marine tourism; health and wellness tourism; culinary, cultural and heritage tourism; and Jamaicans at home and in the Diaspora. Jamaica also will diversify its geographic source markets by increasing the relative levels of arrivals from Europe, Latin America and the Caribbean, developing new and emerging markets such as China, while continuing to consolidate its presence in the North American market.

Jamaica will seek to increase the economic value of its tourism sector by increasing the number of visitor arrivals over time within the carrying capacity of the country, and by earning and retaining higher value for the country from each tourist arrival. The strategies to increase the economic value of the sector include: diversifying into higher value-added market segments as described above; increasing the use of Jamaican inputs and culture in all areas of the industry; widening the participation in the tourism industry by local stakeholders; promoting investment in tourism; and strengthening the economic linkages between tourism and other sectors of the Jamaican economy. The international competitiveness of the sector will be increased by improving training and working conditions at all levels, and improving standards and levels of customer service.

Finally, the Vision 2030 Jamaica Tourism Sector Plan will focus on enhancing the environmental and social sustainability of the tourism sector by strengthening the integration of tourism development with sustainable land use planning and environmental management, and with the national efforts to address crime and harassment.

4.2.2 Goals and Outcomes

The five (5) main goals and associated outcomes of the Tourism Sector Plan are presented below. The Sector Goals represent the ultimate desired state of the Tourism Sector through which we realize the Sector Vision. The Sector Outcomes represent the desired results which we seek to achieve under each goal. A range of indicators and targets aligned to the Sector Outcomes provide quantitative milestones against which progress in implementing the Tourism Sector Plan over time may be measured.

Table 11: Tourism Sector Goals and Outcomes

Goals	Outcomes
1.0:- A tourism sector which is inclusive and facilitates broad participation by Jamaicans	1.1:- An expanded base of stakeholders in the tourism sector
	1.2:- Increased social responsibility by the tourism sector
2.0:- An adequate workforce within the sector that is skilled, educated and motivated	2.1:- A cadre of skilled, trained and motivated personnel that can effectively fill all the positions in the sector
	2.2:- A sector with a worker-friendly environment
3.0:- A highly integrated sector which can act as a driver for economic development	3.1:- Strong economic linkages between tourism and other industries and sectors
	3.2:- An economically viable sector
4.0:- A tourism product that is diverse and distinctly Jamaican with international competitive standards	4.1:- A competitive mix of variety and category of accommodations
	4.2:- A tourism sector with a diversity of attractions
	4.3:- A diversified geographic source market
	4.4:- Diversified tourism market segments
	4.5:- A diversified cruise industry with increased value
	4.6:- Improved quality, authenticity and diversity of entertainment, cuisine and shopping
	4.7:- Improved ground transportation and travel trade
	4.8:- A tourism product that benefits from and builds on Brand Jamaica
5.0:- A safe, secure, sustainably managed natural, social and built environment	5.1:- A sector that protects and promotes the protection of natural and cultural heritage
	5.2:- A sector whose development and operation take place within an effective health and environmental framework
	5.3:- A sector which is free from crime and violence

4.2.3 Integration with the National Development Plan

Under Vision 2030 Jamaica, each Sector Plan is integrated with the strategic framework of the National Development Plan. The Tourism Sector Plan is aligned with the National Development Plan under the following National Goal and National Outcome:

National Goal #3:	Jamaica's Economy is Prosperous
National Outcome #12:	Internationally Competitive Industry Structures

Consequently the implementation of the Tourism Sector Plan will contribute primarily to the achievement of National Goal #3 and National Outcome #12 of the National Development Plan.

4.3 Sector Indicators and Targets

The proposed indicators and targets for the Tourism Sector Plan over the period 2009 - 2030 are presented in Table 12 below.

Table 12: Tourism Sector Plan – Proposed Indicators and Targets

Tourism Sector Plan					
PROPOSED OUTCOME INDICATORS	**BASELINE**	**PROPOSED TARGETS**			**COMMENTS**
	2007 or Most current	**2012**	**2015**	**2030**	
% change in foreign exchange earnings from tourism	3.4%	≥3.98%	≥3.98%	≥4.1%	The World Tourist Organization projects that tourism will grow globally at about 4.1% and for the Americas at about 3.98%, until 2020. The targets for Jamaica are set using the projected rate for the Americas to 2020 and at the global rate thereafter.
Travel and Tourism Competitiveness Index (Country Rank)	57th (4.18)	≤ 53	≤48	≤ 35	Target is for Jamaica to regain its 2006 position by 2015, and to be in the top quartile and be ranked at or above 35 by 2030.
% Change in Annual Visitor Arrivals (%): • **Total** • **Stopover** • **Cruise Passenger**					
Community-Based Tourism					
% Change in Direct Employment in Visitor Accommodation Sub-Sector (%)					
% Staff with Training (%)					

Tourism Sector Plan					
PROPOSED OUTCOME INDICATORS	**BASELINE**	**PROPOSED TARGETS**			**COMMENTS**
	2007 or Most current	**2012**	**2015**	**2030**	
% of establishments with schemes for: • Pensions • Health Insurance					
% Change in Number of Complaints in Relation to Labour Legislation (%)					
Labour productivity growth rate – tourism sector (%)					
% Change in Capital Investment in Tourism Sector (%)					
% Change in Balance of Payments Travel Earnings (%)					
Visitor Satisfaction (Likert Scale Index)					
Visitor Expenditure – Stopover & Cruise Passenger (US$ per day)					
% Visitor Arrivals by Source Country					
% Visitor Arrivals by Market Segment					
% Change in Visitor Accommodation Rooms (%)					
% Change in Number of Registered Bed and Breakfast Facilities (%)					
% Change in Number of Attractions – Licensed and Non-Licensed (%)					
% of Cruise Passengers that are Pre-Booked					
% Change in Number of Crimes against Tourists (%)					
% Change in Incidence/Perception					

Tourism Sector Plan					
PROPOSED OUTCOME INDICATORS	**BASELINE**	**PROPOSED TARGETS**			**COMMENTS**
	2007 or Most current	**2012**	**2015**	**2030**	
of Tourist Harassment (%)					
% Change in Number of Breaches of Health and Safety Standards (%)					
% Change in Number of Establishments with Environmental Management Systems (%)					
Other Environmental Indicators					

5. Implementation, Monitoring & Evaluation Framework for the Tourism Sector

5.1 Implementation Framework

The implementation of the Tourism Sector Plan is an essential component of the implementation, monitoring and evaluation framework for the Vision 2030 Jamaica – National Development Plan. The Plan is implemented at the sectoral level by ministries, departments and agencies (MDAs) of Government as well as non-state stakeholders including the private sector, NGOs and CBOs. The involvement of stakeholders is fundamental to the successful implementation of the National Development Plan and the Tourism Sector Plan.

Components of Vision 2030 Jamaica

The Vision 2030 Jamaica - National Development Plan has three (3) components:

1. **Integrated National Development Plan:**
   The integrated National Development Plan presents the overall plan for Vision 2030 Jamaica, integrating all 31 sector plans into a single comprehensive plan for long-term national development. The integrated National Development Plan presents the National Vision, the four National Goals and fifteen National Outcomes, and the National Strategies required to achieve the national goals and outcomes.
2. **Medium Term Socio-Economic Policy Framework (MTF):**
   The Medium Term Socio-Economic Policy Framework (MTF) is a 3-yearly plan which summarizes the national priorities and targets for the country and identifies the key actions to achieve those targets over each 3-year period from FY2009/2010 to FY2029/2030.
3. **Thirty-one (31) Sector Plans:**
   At the sectoral level Vision 2030 Jamaica will be implemented through the strategic frameworks and action plans for each sector as contained in the respective sector plans. Vision 2030 Jamaica includes a total of thirty-one (31) sector plans covering the main economic, social, environmental and governance sectors relevant to national development.

5.1.1 Accountability for Implementation and Coordination

The Cabinet, as the principal body with responsibility for policy and the direction of the Government, has ultimate responsibility for implementation of the National Development Plan. Each ministry and agency will be accountable for implementing the National Development Plan

(NDP) through various policies, programmes and interventions that are aligned with the strategies and actions of the NDP and the sector plans. A robust results-based monitoring and evaluation system will be established to ensure that goals and outcomes of the Plan are achieved. This system will build on existing national and sectoral monitoring and evaluation frameworks and will be highly participatory.

5.1.2 Resource Allocation for Implementation

Vision 2030 Jamaica places great emphasis on ensuring that resource allocation mechanisms are successfully aligned and integrated with the implementation phase of the National Development Plan and sector plans. The requirements to ensure resource allocation for implementation will include alignment of organizational plans in the public sector, private sector and civil society with the National Development Plan, MTF and sector plans; coherence between the various agency plans with the National Budget; rationalization of the prioritization process for public sector expenditure; and increased coordination between corporate planners, project managers and financial officers across ministries and agencies.

5.2 Monitoring and Evaluation Framework

5.2.1 Institutional Arrangements

A number of institutions and agencies, including the following, will be involved in the monitoring and evaluation framework for the National Development Plan and the Tourism Sector Plan:

1. **Parliament**: The Vision 2030 Jamaica Annual Progress Report will be presented to the Parliament for deliberations and discussion.

2. The **Economic Development Committee (EDC)** is a committee of Cabinet chaired by the Prime Minister. The EDC will review progress and emerging policy implications on the implementation of Vision 2030 Jamaica and the relevant sector plans.

3. The **Vision 2030 Jamaica Technical Monitoring Committee (TMC)**, or Steering Committee, is to be chaired by the Office of the Prime Minister and will provide oversight for the technical coordination and monitoring of the Plan and reporting on the progress of implementation.

4. The **Vision 2030 Jamaica Technical Secretariat** to be institutionalized within the PIOJ will play a leading role in coordinating implementation, analyzing social and economic data and information, consolidating sectoral information into comprehensive reports on Vision 2030 Jamaica's achievements and results, maintaining liaisons with sectoral focal points in MDAs, and supporting the establishment and operation of Thematic Working Groups.

5. **Ministries, Departments and Agencies (MDAs)** represent very important bodies within the implementation, monitoring and evaluation system. They are the Sectoral Focal Points that will provide data/information on a timely basis on the selected sector indicators and action plans, and be responsible for the timely preparation of sector reports that will feed into the Vision 2030 Jamaica Annual Progress Report. For the Tourism Sector Plan, the main MDAs comprising the relevant Sectoral Focal Point will include the Ministry of Tourism, the Jamaica Tourist Board and the Tourism Product Development Company Limited.

6. **Thematic Working Groups (TWGs)** are consultative bodies aimed at providing multi-stakeholder participation in improving the coordination, planning, implementation and monitoring of programmes and projects relevant to the NDP and sector plans, including the Tourism Sector Plan. TWGs will be chaired by Permanent Secretaries or senior Government officials and shall comprise technical representatives of MDAs, National Focal Points, the private sector, Civil Society Organizations and International Development Partners. TWGs will meet a minimum of twice annually.

5.2.2 Indicator Framework and Data Sources

Appropriate indicators are the basic building blocks of monitoring and evaluation systems. A series of results-based monitoring policy matrices will be used to monitor and track progress towards achieving the targets for the NDP and sector plans, including the Tourism Sector Plan. The performance monitoring and evaluation framework will be heavily dependent on line/sector ministries for quality and timely sectoral data and monitoring progress.

The results-based performance matrices at the national and sector levels comprise:

- At the national level, 60 proposed indicators aligned to the 15 National Outcomes
- At the sector level, a range of proposed indicators aligned to the sector goals and outcomes
- Baseline values for 2007 or the most recent past year
- Targets which outline the proposed values for the national and sector indicators for the years 2012, 2015 and 2030
- Data sources which identify the MDAs or institutions that are primarily responsible for the collection of data to measure and report on national and sector indicators
- Sources of targets
- Links to existing local and international monitoring frameworks such as the MDGs

Some gaps still exist within the performance matrix and a process of review to validate the proposed indicators and targets is being undertaken. This process is very technical and time consuming and requires significant cooperation and support from stakeholders and partners. The performance monitoring and evaluation framework will be heavily dependent on ministries for quality and timely sectoral data and monitoring progress. The system will benefit from our existing and relatively large and reliable statistical databases within the Statistical Institute of Jamaica (STATIN) and the PIOJ.

5.2.3 Reporting

The timely preparation and submission of progress reports and other monitoring and evaluation outputs form an integral part of the monitoring process.

The main reports/outputs of the performance monitoring system are listed below.

1. **The Vision 2030 Jamaica Annual Progress Report** will be the main output of the performance monitoring and evaluation system.

2. **The annual sectoral reports** compiled by the Sectoral Focal Points for submission to the Vision 2030 Jamaica Technical Monitoring Committee. These will be integrated into the Annual Progress Report.

3. **Other products** of the performance monitoring system include issues/sector briefs and research reports.

5.2.4 Capacity Development

There is recognition that building and strengthening technical and institutional capacity for the effective implementation, monitoring and evaluation of the NDP and the Tourism Sector Plan is critical for success. This calls for substantial resources, partnership and long-term commitment to training MDA staff. Training needs will have to be identified at all levels of the system; a reorientation of work processes, instruments, procedures and systems development will have to be undertaken; and staffing and institutional arrangements will need to be put in place. Partnership with the Management Institute for National Development (MIND) and other institutions also will be required to provide training to public sector staff and others in critical areas such as results-based project management and analysis, monitoring and evaluation, and data management.

5.3 The Way Forward

The Tourism Sector Plan will represent the basis for implementation of the Vision 2030 Jamaica – National Development Plan in the Tourism sector. Some key steps in the implementation process for the Tourism Sector Plan include:

1. Undertake consultations with stakeholders in the sector to present and review the Tourism Sector Plan for Vision 2030 Jamaica;

2. Engage with key stakeholders including relevant Ministries, Departments and Agencies (MDAs) to finalize sector-level indicators and targets for the Tourism Sector Plan for 2012, 2015 and 2030;

3. Mainstream the Tourism Sector Strategic Framework and Action Plan into the Corporate/Business and Operational Plans of the relevant MDAs as the mechanism for implementation in the public sector;

4. Ensure participation by key Tourism sector stakeholders in the establishment and ongoing operation of the implementation, monitoring and evaluation framework for Vision 2030 Jamaica, including the Sectoral Focal Point and Thematic Working Group for the Tourism Sector Plan.

6. Action Plan for the Tourism Sector

The Action Plan represents the main framework for the implementation of the Tourism Sector Plan for Vision 2030 Jamaica. The tracking of implementation of the Tourism Sector Plan will take place through the Action Plan as well as the framework of sector indicators and targets.

The Action Plan contains the following elements:

i. Sector Goals
ii. Sector Outcomes
iii. Sector Strategies
iv. Sector Actions
v. Responsible Agencies
vi. Time-Frame

VISION 2030 JAMAICA
TOURISM SECTOR PLAN
DRAFT STRATEGIC FRAMEWORK AND ACTION PLAN

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
Goal # 1: A tourism sector which is inclusive and facilitates broad participation by Jamaicans				
1.1:- An expanded base of stakeholders in the tourism sector	**1.1.1:-** Create the framework to facilitate awareness, broad participation, business opportunity and access	1.1.1.1 Encourage public participation in the decision making and management of the tourism industry	**MOT**, JHTA, NEPA, Parish Councils, PDCs	Years 1-3 Ongoing
		1.1.1.2 Hold quarterly regional fora on business opportunities and projects in the tourism sector	**JTI**, JBDC, JTB, TPDCo	Years 1-3 Ongoing
		1.1.1.3 Amend Tourist Board Act to facilitate participation by stakeholders	**MOT**	Years 1-3 Ongoing
		1.1.1.4 Review structure and composition of Resort Boards and strengthen their role and capacity for effective oversight of governance of sector	**MOT**	Years 1-3
		1.1.1.5 Apply Public Sector Code of Consultation	**MOT,** Cabinet Office	Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	1.1.2:- Expand and promote tourism-related entrepreneurial and employment opportunities for communities including community-based tourism	1.1.2.1 Promote use of guidelines for Community Tourism Development including through training	**UWI, Institute of Hospitality and Tourism,** CTO, JTB, TPDCo, SDC	Years 1-3 Ongoing
		1.1.2.2 Develop programmes to increase opportunities for the community self-employed and small businesses in the formal and informal sectors who supply goods and services to the industry (e.g. Tourism for Prosperity Entrepreneurship Drive)	**TPDCo,** JBDC, TEF, JHTA, UWI, Institute of Hospitality and Tourism	Years 1-6 Ongoing
		1.1.2.3 Develop and promote community-based tourism projects through provision of micro-credit and technical assistance (e.g. Small Enterprises Assistance Programme)	**TPDCo**, TEF, JTB, EFJ, JPAT, JSIF, Other NGOs, Private financial institutions	Years 1-9 Ongoing
		1.1.2.4 Develop and promote Bed and Breakfast Home Stay Programme with adequate marketing and organizational support	**TPDCo**, JTB, Private sector	Years 1-3
		1.1.2.5 Develop policies pertaining to community-based tourism	**MOT**, TPDCo, CBOs, Private Sector	Years 1-3
		1.1.2.6 Strengthen supporting environment for community tourism	**MOT**, MNS, Minister of Local Govt, OPM, Local Authorities, PDCs, TPDCo, JHTA, JTI, JBDC	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	1.1.3:- Increase capacity of stakeholders to participate in the sector	1.1.3.1 Use cluster approach to build capacity and competitiveness across tourism sub-sectors	**JHTA**, **JTI**, JEA, MOT	Years 1-3 Ongoing
		1.1.3.2 Promote and deliver training programmes to increase exposure to modern business techniques and technologies	**TPDCo**, **JHTA, HEART Trust/NTA, JBDC**, Tourism trade partners/ associations, tertiary institutions, JTI	Years 1-3 Ongoing
		1.1.3.3 Build institutional capacity of tourism trade associations	**Tourism trade associations,** TPDCo, MOT	Ongoing
	1.1.4:- Facilitate the development of tourism enterprises	1.1.4.1 Review incentives system to reflect tourism policy and strategic objectives	**MFPS, MOT,** MIIC, JTI, trade associations	Years 1-3
1.2:- Increased social responsibility by the tourism sector	**1.2.1:-** Increase awareness of the economic and social benefits of the tourism sector	1.2.1.1 Carry out public education campaigns on tourism sector and its value to the nation's development	**JTB,** JIS, MOT, MOE, MYSC	Ongoing
		1.2.1.2 Provide information and support to local educational institutions (schools, colleges, etc) for extension-type educational programmes on tourism issues	**MOT,** MOE, NEPA	Years 1-3 Ongoing
	1.2.2:- Encourage corporate social responsibility which should lead to improved quality of life in adjoining communities	1.2.2.1 Encourage tourism enterprises to operate as good corporate citizens with integrity and ethical codes of practice	**Tourism trade associations,** MFPS, MOT, NGOs, CBOs	Ongoing
		1.2.2.2 Promote use of triple bottom line accounting incorporating financial,	**Tourism trade associations,** MFPS,	Years 1-6 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		social and environmental performance	MOT, NGOs, CBOs	
Goal # 2: An adequate workforce within the sector that is skilled, educated and motivated				
2.1:- A cadre of skilled, trained and motivated personnel that can effectively fill all the positions in the sector	**2.1.1:-** Develop a dynamic and flexible demand-driven education and training system for tourism	2.1.1.1 Establish Hospitality School for supervisory level staff	**MOT**, TPDCo, tertiary institutions, HEART Trust/NTA	Years 1-3
		2.1.1.2 Encourage use and development of national training system	**HEART Trust/NTA**, TPDCo, trade associations	Years 1-3 Ongoing
		2.1.1.3 Institute identification of occupations within the tourism sector and ensure certification of personnel within those occupations	**HEART Trust /NTA**, TPDCo, trade associations, MOT, tertiary institutions,	Years 1-3
	2.1.2:- Promote and facilitate access to education and training opportunities	2.1.2.1 Disseminate information on available education and training opportunities	**HEART Trust /NTA**, TPDCo, trade associations, educational institutions, SDC	Ongoing
		2.1.2.2 Train local people in tourism-related skills so as to increase local people's role in and benefit from tourism	**HEART Trust /NTA**, Private Sector, MOT	
		2.1.2.3 Develop community-based programmes for training and human resource development	**HEART Trust /NTA**, SDC, private sector, schools,	Ongoing
	2.1.3:- Incorporate tourism awareness into school curricula	2.1.3.1 Provide supplemental information on tourism to the Ministry of Education for enrichment of	**MOT, MOE**, JTB	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		school curricula at primary and secondary levels		
	2.1.4:- Build capacity of tourism education to international standards	2.1.4.1 Ensure continuous training of leadership of tourism education institutions in respect of requirements for maintaining international standards	Tourism education institutions **UCJ**, NCTVET,	Ongoing
		2.1.4.2 Promote learning of foreign languages to increase multi-lingual capacity of sector	**MOE**, MFAFT, MOT, TPDCo, HEART Trust/NTA	Ongoing
	2.1.5:- Meet international quality standards in education and training	2.1.5.1 Maintain quality assurance framework at international levels	**UCJ**	Ongoing
		2.1.5.2 Ensure that tourism education and training institutions and programmes are accredited	**UCJ**	Ongoing
		2.1.5.3 Promulgate the importance of quality assurance bodies in international competitiveness	**UCJ, HEART Trust /NTA**	Ongoing
		2.1.5.4 Promulgate the importance of individual certification to ensure competitiveness	**HEART/NTA**, UCJ, trade associations	Ongoing
2.2:- A sector with a worker-friendly environment	**2.2.1:-** Strengthen the legislative and regulatory framework to protect workers' health, safety, remuneration and rights	2.2.1.1 Establish pension scheme for workers in tourism sector	**MLSS**, MFPS, MOT, pensions industry, JCTU	Years 1-3
		2.2.1.2 Encourage establishment of health insurance schemes in industry	**MLSS**, MFPS, MOT, MOHE, JHTA, Insurance industry, JCTU	Years 1-3

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		2.2.1.3 Ensure that workers are compensated within legal guidelines and are provided with all benefits to which they are entitled	**MLSS**, JCTU, trade associations, JHTA	Years 1-3 Ongoing
		2.2.1.4 Provide education, awareness, policies and active programmes on health issues including HIV/AIDS	**MOHE, TPDCo**, MOT	Ongoing
	2.2.2:- Create a working environment that leads to increased productivity	2.2.2.1 Provide job description for each worker/position within service culture	**Trade associations**, individual enterprises, HEART/ NCTVET, CROSQ.org	Years 1-3 Ongoing
		2.2.2.2 Encourage productivity-based compensation and incentives schemes	**Trade associations**, individual enterprises	Ongoing
		2.2.2.3 Promote best practice in worker motivation and labour relations	**Trade associations**, individual enterprises, MOT, JTB	Ongoing
	2.2.3:- Strengthen the social infrastructure for workers and adjoining communities of resort areas	2.2.3.1 Participate in land use planning for resort areas and adjoining communities, including planning for housing, supporting infrastructure and transport needs	**Parish councils**, NEPA, UDC, Resort Boards, JTI, MOT	Ongoing
		2.2.3.2 Develop mechanisms for including construction and provision of social infrastructure as part of major resort developments	**JTI**, Parish councils, NEPA, UDC, Resort Boards, NHT, NWA, NWC, MOT, MTW, MWH	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
Goal # 3: A highly integrated sector which can act as a driver for economic development				
3.1:- Strong economic linkages between tourism and other industries and sectors	**3.1.1:-** Identify, create awareness of and facilitate opportunities for linkages between tourism and other sectors	3.1.1.1 Undertake analysis of tourism industry value chain including the informal sector	**JTI**, STATIN, PIOJ, MOT, JTB	Years 1-3
		3.1.1.2 Promulgate opportunities for linkages identified by value chain analysis	**JTI**, MOT, MOA, MIIC	Years 1-3 Ongoing
	3.1.2:- Establish appropriate marketing systems to bring together purchasers in the tourism sector and producers in linkage sectors and industries	3.1.2.1 Develop and update database of use and demand for local products in tourism sector	**JTB**, **JTI**, JBDC, RADA, IMBJ, JMA, MOT, MOA, MIIC, STATIN, PIOJ	Years 1-3 Ongoing
		3.1.2.2 Establish linkages between marketing databases and information systems	**JTB**, **JTI**, JBDC, RADA, IMBJ, JMA	Years 1-3 Ongoing
		3.1.2.3 Hold workshops between producers and purchasers	**JTB**, **JTI, JHTA, JAS, JMA,** producers' and trade associations	Years 1-3 Ongoing
	3.1.3:- Coordinate economic and fiscal policies across industries and sectors to sustain economic development	3.1.3.1 Establish and implement, monitor and evaluate NDP including Tourism Sector Plan	**PIOJ, MFPS, CO, OPM, Other agencies**	Years 1-21
	3.1.4:- Strengthen the capacity of producers to meet demands of tourism sector	3.1.4.1 Undertake capacity assessments of suppliers in key linkage sectors	**RADA, JMA, JEA,** producers' and trade associations, MOT, MOA, MIIC	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		3.1.4.2 Take necessary steps to build capacity: • Marketing • Product standards • Technical • HRD • Business systems etc	• **JHTA, RADA, JMA**, MOA, JAS • **MOA, JAS**, • **DBJ**	Years 1-3 Ongoing
	3.1.5:- Develop sector-specific plans to expand linkages including for: • Raw produce, minimal processed and value-added agricultural products • Manufactured items for boutique hotels	3.1.5.1 Encourage collaboration between the Chef Association and the MOA	**MOT, MOA**, JHTA, Chef Association, Agribusiness Stakeholders Association	Years 1-3
		3.1.5.2 Create distribution channels between farmers and hotels including farmers' markets	**MOA, JAS, MOT, JHTA**	Years 1-3 Ongoing
		3.1.5.3 Create investment vehicles for linkage industries	**MIIC**, JTI, JBA, DBJ	Years 1-3 Ongoing
3.2:- An economically viable sector	**3.2.1:-** Strategically position the tourism sector as a national development priority	3.2.1.1 Identify and promote contribution of tourism to national challenges including health and environment	**MOT**, JHTA	Years 1-3 Ongoing
		3.2.1.2 Complete Mid-Term Review of the Tourism Master Plan	**MOT**	Year 1
	3.2.3:- Promote increased levels of retention of tourism earnings in Jamaica	3.2.3.1 Review tax laws to encourage retention of tourism earnings in Jamaica	**MOT, MFPS**	Years 1-3
	3.2.4:- Promote and enhance investment	3.2.4.1 Enhance promotion of Jamaica as destination for investment in tourism sector	**JTI**, MOT, JTB	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	opportunities in the sector for both local and international investors	3.2.4.2 Identify key attractions and other strategic projects, create legal framework and develop business plans and prospectuses to promote for development by local and foreign investors including in partnership with government	**MOT, JTI**, **DBJ**, TPDCo, UDC	Years 1-9
		3.2.4.3 Promote business plans and prospectuses for key projects to the diaspora	**JTI**, **DBJ,** MFAFT	Years 1-9
	3.2.5:- Promote efficiency of bureaucracy regarding approvals and facilitation of investments, and operation of the industry	3.2.5.1 Fully establish cruise and marine division in JTB	**JTB**	Years 1-3
		3.2.5.2 Build capacity for due diligence on investors in tourism sector	**JTI**	Years 1-3 Ongoing
		3.2.5.3 Stimulate sustainable growth and development of tourism sector through use of the Tourism Enhancement Fund (TEF)	**MOT**, TEF, TPDCo	Ongoing
	3.2.6:- Strengthen regional approaches to marketing and trade negotiations	3.2.6.1 Participate in One Caribbean marketing campaign	**JTB**, CTO	Years 1-3 Ongoing
		3.2.6.2 Develop regional strategy for air transport and cruise industry	**MOT**, MFAFT, MTW	Years 1-3 Ongoing
		3.2.6.3 Develop business model and anti-trust legislation to improve Jamaica's and Caribbean role in tourism system	**MOT**, UWI, JTI	Years 1-6
	3.2.7:- Increase value-added and retained per tourist arrival	3.2.7.1 Undertake study on cruise industry	**UWI, PAJ**, JTB, MOT	Years 1-3

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	3.2.8:- Strengthen use of knowledge to increase value of the sector	3.2.8.1 Increase research capacity of sector	**Universities, Institute of Hospitality and Tourism**, JTB	Ongoing
		3.2.8.2 Increase use of information and communications technology (ICT) in all areas of tourism operations including reservation systems	**JTB, JHTA**, Trade associations	Ongoing
		3.2.8.3 Develop information database and data mining capacities of sector	**JTB, STATIN**, JTI, IHT	Years 1-3 Ongoing
		3.2.8.4 Promote increased interpretation and availability of printed literature for tourists	**JTB, JHTA**	Ongoing
		3.2.8.5 Complete development and application of Tourism Satellite Accounts	**STATIN**, PIOJ, MFPS, MOT	Years 1-3
		3.2.8.6 Strengthen market intelligence programme and systems	**JTB**, IHT, Industry	Years 1-3 Ongoing
Goal # 4: A tourism product that is diverse and distinctly Jamaican with international competitive standards				
4.1:- A competitive mix of variety and category of accommodations	**4.1.1:-** Develop a variety of accommodations	4.1.1.1 Develop tourism area plans with recommended zoning/location of categories of accommodation	**NEPA,** UDC, Parish councils, PDCs, public and private sector development organizations (e.g. KCCIC, SADCO, PRDCL)	Years 1-6
		4.1.1.2 Develop medium-large EP hotels	Private sector	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		4.1.1.3 Develop new mega-resort projects with casinos: • Celebration Jamaica • Harmony Cove	Public-private partnerships (PPPs), MOT, TPDCo, JHTA	Years 1-3 Ongoing
		4.1.1.4 Develop bed and breakfast accommodations	**Private sector,** TPDCo, JTB, JTI	Years 1-3 Ongoing
		4.1.1.5 Develop high-end and mixed-use (resort residential) accommodations	**Private sector,** TPDCo, JTB, JTI	Years 1-3 Ongoing
		4.1.1.6 Develop convention hotels and supporting capacity	**Private sector,** UDC, PPPs, TPDCo, JTB, JTI	Years 1-3 Ongoing
		4.1.1.7 Develop retirement villages with supporting facilities, services and legislation	**Private sector,** DBJ, PPPs, TPDCo, JTB, JTI	Years 1-3 Ongoing
	4.1.2:- Ensure the continued development of existing categories of accommodations	4.1.2.1 Implement comprehensive resort upgrading programme (e.g. Spruce Up Jamaica)	**MOT,** TPDCo, TEF, Parish Councils	Years 1-3 Ongoing
		4.1.2.2 Support sustainable small hotel sub-sector (Product development support, management audits, e.g. access to credit for specific categories e.g. smaller properties, EP)	**MOT, JHTA,** TPDCo, IDB,	Years 1-3 Ongoing
		4.1.2.3 Support further development of all-inclusive hotels	**MOT, JHTA,** TPDCo	Years 1-3 Ongoing
	4.1.3:- Ensure that development takes	4.1.3.1 Carry out up-to-date carrying capacity study of tourism industry at national level	**MOT, TPDCo,** TEF	Years 1-3 Periodic

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	place within the carrying capacity of resort areas	4.1.3.2 Carry out up-to-date carrying capacity studies of main tourism areas	**MOT, TPDCo,** TEF	Years 1-3 Periodic
		4.1.3.3 Integrate results of carrying capacity studies in tourism area plans	**NEPA,** UDC, Parish councils, PDCs, public and private sector development organizations (e.g. KCCIC, SADCO, PRDCL)	Years 1-6
		4.1.3.4 Carry out determination of the carrying capacity for cultural and nature-based attraction projects as well as an assessment of the carrying capacity of beaches	**NEPA,** TEF, JNHT, MOT, TPDCo	Years 1-3 Periodic
		4.1.3.5 Conduct biodiversity risk assessments and determine carrying capacity for protected and sensitive areas, which promote eco-tourism attraction	**MOT, TPDCo,** TEF, NEPA, JNHT	Years 1-3 Periodic
		4.1.3.6 Put in place mechanisms that monitor indicators to ensure carrying capacity is not exceeded	**MOT, NEPA, STATIN, private and public sector operators,** PCs, ENGOs	Years 1-3 Ongoing
4.2:- A tourism sector with a diversity of attractions	**4.2.1:-** Promote development of authentic attractions utilizing country's natural and cultural resources	4.2.1.1 Develop and implement Jamaica's parks and protected areas systems plan	**NEPA, JPAT, ENGOs,** MOT	Years 1-3 Ongoing
		4.2.1.2 Develop and implement sustainable tourism action plans for selected parks and protected	**NEPA, JPAT, ENGOs,** MOT	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		areas		
		4.2.1.3 Ensure that the selected parks are properly funded to support the required number of park rangers and the required level of expertise in tourism management	**MFPS, Ministry with responsibility for the Environment, NEPA, JPAT, ENGOs,** MOT	Years 1-3 Ongoing
		4.2.1.4 Develop guidelines and codes of conduct for the management of heritage, cultural, historical and nature-based attractions projects	**JNHT, TPDCo, NEPA,** AJAL	Years 1-3 Ongoing
		4.2.1.5 Develop a support network and partnerships with tour operators and local communities	**MOT, tour operators, ENGOs, CBOs**	Years 1-3 Ongoing
	4.2.2:- Establish a supporting environment for the development of various types of attractions	4.2.2.1 Strengthen Heritage and Community Development Unit of TPDCo	**TPDCo**	Years 1-3 Ongoing
		4.2.2.2 Establish Attractions Development Unit at TPDCo	**TPDCo**	Years 1-3
		4.2.2.3 Clarify definition of attractions in Tourist Board Act	**MOT, JTB**	Years 1-3
		4.2.2.4 Review current incentives for attractions, with respect to categories, criteria and length of time	**MFPS, MOT, MIIC, JTI**	Years 1-3 Ongoing
		4.2.2.5 Strengthen infrastructure for attractions	**MTW**, MOT	Years 1-6 Ongoing
		4.2.2.6 Expand range of public sector and private sector funding sources for attractions	**MOT, DBJ,** Private sector, AJAL	Years 1-6 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	4.2.3:- Facilitate involvement of local communities and stakeholders in attractions development	4.2.3.1 Conduct consultations with communities and stakeholders in the process of attractions development	**Private sector, AJAL, TPDCo, ENGOs, CBOs**	Years 1-3 Ongoing
		4.2.3.2 Include community/stakeholder representatives on governing bodies of attractions	**Private sector, AJAL, TPDCo, ENGOs, CBOs**	Years 1-3 Ongoing
		4.2.3.3 Work in partnerships with local people, the tourism sector, and local organizations and provide opportunities for community-based ventures	NEPA, MOT, ENGOs, CBOs, PCs	
	4.2.4:- Develop and implement flagship heritage, cultural, historical and nature-based attractions projects	4.2.4.1 Establish organizational responsibility for implementation of specific flagship projects	**OPM, MFPS, DBJ, MOT**	Years 1-3
		4.2.4.2 Develop project documents / prospectuses (development plans and investment mechanisms) for specific flagship projects, including: • Port Royal • Spanish Town • Fort Charlotte • Seville • Falmouth • Other (e.g. priority lists of Master Plan / NEPA)	**DBJ,** Project companies/partnerships, JTI	Years 1-9
		4.2.4.3 Develop specific projects initially as demonstration projects	**DBJ**, Project companies/partnerships,	Years 1-9

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
			private sector, JTI	
		4.2.4.4 Secure designation of selected priority sites as World Heritage Sites (including through providing support for applications) • Port Royal • Spanish Town • Seville • Falmouth	**JNHT, MYSC, MOT**	Years 1-9
		4.2.4.5 Design interpretive programmes (e.g. historical interpretive master plans) to revolve around specific themes, with clear messages relating to local environmental and cultural issues	**JNHT, IOJ, NEPA, MOT, DBJ**, Project companies/partnerships	Years 1-9
	4.2.5:- Promote and support nature- and heritage-based tourism enterprises linked to conservation programmes	4.2.5.1 Foster collaboration between nature- and heritage-based tourism enterprises and research institutions (e.g. UWI)	**MOT, NEPA, JNHT, UWI, AJAL**, Private sector	Years 1-3 Ongoing
		4.2.5.2 Provide tourism funds for conservation programmes such as ecological restoration and archaeology sites, including through public/private partnerships	**NEPA, MOT, JNHT, ENGOs, TEF, Private Sector**	Years 1-3 Ongoing
4.3:- A diversified geographic source market	**4.3.1:-** Expand domestic tourism market	4.3.1.1 Increase public relations and marketing to domestic market including local tourism events and activities	**JTB, MOT, JHTA**	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	4.3.2:- Integrate airlift requirements for tourism sector into transport policy, planning and implementation	4.3.2.1 Provide support to increase airlift and open gateways	**MTW, Jamvac, JTB, MFAFT**	Years 1-3 Ongoing
		4.3.2.2 Support establishment of suitable air service agreements between Jamaica and specific South American, Far Eastern and European countries	**MTW, JTB, MFAFT**	Years 1-3 Ongoing
		4.3.2.3 Develop strategic alliances between Air Jamaica and airlines in South American and European countries	**Air Jamaica, JTB, MOT**	Years 1-3 Ongoing
	4.3.3:- Diversify marketing programmes to geographic source markets	4.3.3.1 Increase marketing programmes to the UK, Continental Europe, Far East, Latin America and the Caribbean	**JTB, MOT, Trade associations, Major industry players, Jamvac**	Years 1-3 Ongoing
		4.3.3.2 Develop emerging tourist markets (BRIC countries)	**JTB, MOT, Trade associations, Major industry players, Jamvac**	Years 1-3 Ongoing
4.4:- Diversified tourism market segments	**4.4.1:-** Expand the existing viable tourism segments: • Sun, sea and sand • Nature/eco • Adventure (soft)	4.4.1.1 Continue programmes to expand existing traditional market segments	**JTB, MOT, Trade associations, Major industry players, Jamvac**	Years 1-3 Ongoing
		4.4.1.2 Involve relevant local organizations in development and promotion of existing market segments	**JTB, MOT, Trade associations, Major industry players, Jamvac**	Years 1-3 Ongoing
	4.4.2:- Develop new tourism	4.4.2.1 Develop Montego Bay Convention Centre	**MOT, UDC**	Years 1-3

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	market segments including: • Meetings & Conventions • Special events and promotions • Sports tourism • Yachting & marine tourism • Health and wellness tourism (including retirement market) • Culinary, cultural and heritage tourism • Jamaicans at home and in the diaspora	4.4.2.2 Strengthen role of joint JTB/JHTA committee to develop and market to new targeted tourism market segments	**JTB, JHTA**	Years 1-3 Ongoing
		4.4.2.3 Develop training programmes for human resource requirements in new market segments including tour guide training and language training	**TPDCO, MOT, HEART Trust/NTA**	Years 1-3 Ongoing
		4.4.2.4 Develop specific Sports Tourism Events working with special interest groups	**JTB, MOT, MYSC, JTI**	Years 1-3 Ongoing
		4.4.2.5 Develop and link the yachting and marine tourism product and develop an island-wide marketing programme linking this to other marinas in the Caribbean especially in the western belt	**JTB, PAJ**	Years 1-3 Ongoing
		4.4.2.6 Develop the health and wellness product offering providing incentives for the various areas such as retirement villages to attract investment and market them as a package	**MOT, MOHE, JTI, JTB**	Years 1-3 Ongoing
		4.4.2.7 Develop linkages between sports performers and promotion of sports tourism	**JTB, MOT, MYSC, JTI**	Years 1-3 Ongoing
		4.4.2.8 Develop youth football tournament in summer for the Americas	**JTB, MOT, MYSC, JTI, JFF, Insport**	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		4.4.2.9 Develop annual youth Cricket Tournament for the Caribbean and North American region	**JTB, MOT, MYSC, JTI, JCA, Insport**	Years 1-3 Ongoing
		4.4.2.10 Develop culinary, cultural and heritage product packages and special events and market these specifically	**JTB, MOT, MYSC, JTI, private sector**	Years 1-3 Ongoing
		4.4.2.11 Develop IAAF event to be held annually in Jamaica (choose slot in season)	**JTB, MOT, MYSC, JTI, JOA, private sector**	Years 1-3 Ongoing
		4.4.2.12 Develop focused marketing programmes for the diaspora and the local markets	**JTB, JHTA, MFAFT**	Years 1-3 Ongoing
	4.4.3:- Promote dual-destination markets with Caribbean countries	4.4.3.1 Develop specific marketing programmes with Cuba and Dominican Republic, including for the European and South American market	**JTB, JHTA, private sector**	Years 1-3 Ongoing
		4.4.3.2 Develop joint marketing programmes with Cayman, Cuba and the Bahamas for the Yachting and Marina market	**JTB, JHTA, PAJ, private sector**	Years 1-3 Ongoing
		4.4.3.3 Develop joint marketing programmes with Cayman, Bahamas, Mexico and possibly Columbia for the Cruise Industry	**JTB, JHTA, PAJ, private sector**	Years 1-3 Ongoing
		4.4.3.4 Develop appropriate protocols and bilateral relations with Cuba	**MOT, MFAFT**	Years 1-3
4.5:- A diversified cruise industry	**4.5.1:-** Rationalize the expansion of ports of	4.5.1.1 Determine berth and terminal capacity by port	**PAJ, NEPA**	Years 1-3

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
with increased value	call within carrying capacity			
	4.5.2:- Increase the diversification of cruise lines visiting the island	4.5.2.1 Undertake face to face meetings and direct marketing with major cruise lines	**PAJ, JTB, cruise lines**	Ongoing
		4.5.2.2 Increase trade show participation	**PAJ, JTB**	Years 1-3 Ongoing
		4.5.2.3 Increase international cruise trade advertising	**PAJ, JTB**	Years 1-3 Ongoing
		4.5.2.4 Identify and target niche markets for cruise lines	**PAJ, JTB**	Years 1-3 / Ongoing
	4.5.3:- Increase development of homeporting of cruise ships	4.5.3.1 Undertake face to face meetings and direct marketing with major cruise lines	**PAJ, JTB**	Years 1-3 / Ongoing
		4.5.3.2 Increase trade show participation	**PAJ, JTB**	Years 1-3 Ongoing
		4.5.3.3 Increase international cruise trade advertising	**PAJ, JTB**	Years 1-3 Ongoing
	4.5.4:- Improve partnerships between destination and cruise lines	4.5.4.1 Encourage engagement of cruise lines in development of main ports and resort areas	**PAJ, JTB, MOT**	Years 1-3 Ongoing
		4.5.4.2 Develop joint-ventures and collaborative projects	**PAJ, JTI, private sector,**	Years 1-3 Ongoing
		4.5.4.3 Target major cruise lines to develop partnerships which include the Jamaican private sector	**PAJ, JTI, private sector**	Years 1-3 Ongoing
	4.5.5:- Increase conversion of cruise passengers to long stay visitors	4.5.5.1 Develop enhanced guest experience for cruise passengers	**TPDCo, JTB, JHTA, MOT, TEF, AJAL,** In Bond Merchants	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
			Association, PAJ	
		4.5.5.2 Ensure provision of well established information booths with well trained guides – who know all tourism offerings in detail – attractions, shopping, dining hotels etc.	**TPDCo, JTB**	Years 1-3 Ongoing
		4.5.5.3 Develop and promote land-sea packages	**PAJ, JTB, cruise lines, airlines**	Years 1-9
	4.5.6:- Increase % of disembarking cruise passengers and average spend per passenger	4.5.6.1 Enhance ambience of port facilities and expand marquee attractions offering of duty free items	**PAJ, TPDCo, MOT, TEF**	Years 1-3 Ongoing
		4.5.6.2 Enhance guest experience in resort towns	**TPDCo, JTB, JHTA, MOT, TEF, AJAL,** In Bond Merchants Association, PAJ	Years 1-3 Ongoing
		4.5.6.3 Strengthen on-board promotion of land-based attractions	**JTB, cruise lines, tour operators**	Years 1-3 Ongoing
	4.5.7:- Increase access to local tourism product by cruise passengers	4.5.7.1 Encourage greater private sector participation in cruise related trade shows and meetings	**PAJ, JTB, JHTA, private sector**	Ongoing
		4.5.7.2 Widen range of local attractions promoted on-board	**JTB, cruise lines, tour operators**	Years 1-3 Ongoing
		4.5.7.3 Strengthen linkages with local ground transport operators	**Cruise lines, JUTA, local ground transport operators**	Years 1-3 Ongoing
	4.5.8:- Increase number of ports of call for	4.5.8.1 Undertake active research for and development of new ports in	**PAJ, cruise lines, private sector**	Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	cruise industry	consultation with major cruise companies and local private sector		
4.6:- Improved quality, authenticity and diversity of entertainment, cuisine and shopping	**4.6.1:-** Transform the concept, physical ambience and shopping experience of the craft sub-sector	4.6.1.1 Develop capacity of local craft producers and marketers including training	**TPDCo, HEART Trust/NTA, JBDC,** Edna Manley	Years 1-3 Ongoing
		4.6.1.2 Establish a Craft Institute to provide craft skills training and product quality certification	**TPDCo, HEART Trust/NTA, JBDC**, UDC	Years 1-3
		4.6.1.3 Support upgrading of craft markets and development of artisan villages to become more culturally rich experiences to include entertainment and dining in the mix of the product	**TPDCo, TEF, JBDC**, UDC	Years 1-3 Ongoing
		4.6.1.4 Establish National Craft Development Council with public/private stakeholders	**TPDCo**	Years 1-3
	4.6.2:- Encourage diversity and variety of entertainment	4.6.2.1 Collaborate with relevant agencies to promote tourist oriented entertainment e.g. Festivals, etc	**MOT, MYSC, JTB, JCDC**	Years 1-3 Ongoing
		4.6.2.2 Encourage and support the development of appropriate venues for entertainment and creative arts in tourism areas	**MFPS, MOT, JTI**	Years 1-3 Ongoing
	4.6.3:- Improve competitiveness of in-bond and souvenir	4.6.3.1 Modernize the accounting and reporting process (customs)	**MFPS, Customs, in-bond merchants**	Years 1-3
		4.6.3.2 Revise Duty-Free Act to increase	**MFPS, MOT**	Years 1-3

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	sub-sector	the range of goods that can be sold in bond		
4.7:- Improved ground transportation and travel trade	**4.7.1:** Facilitate competitive provision of ground transportation	4.7.1.1 Enhance existing incentive system for ground transport operators	**MFPS, MOT, MTW, MIIC, Trade Board**	Years 1-3
	4.7.2:- Encourage development of destination management services	4.7.2.1 Develop Jamaica's participation in the global distribution system through the Computer Reservation System (CRS)	**Travel agents**, MOT, JTB	Years 1-3 Ongoing
	4.7.3:- Promote capabilities of tour operators to develop new geographic markets and market segments	4.7.3.1 Enhance partnerships with the travel trade through JAMVAC	**Travel agents**, **Jamvac**	Years 1-3 Ongoing
	4.7.4:- Facilitate increased communication and collaboration between local industry members	4.7.4.1 Enhance partnerships within and between tourism/travel trade associations	**Tourism/travel trade associations**	Years 1-3 Ongoing
4.8:- A tourism product that benefits from and builds on Brand Jamaica	**4.8.1:-** Ensure that all aspects of the tourism sector meet required standards and customer service	4.8.1.1 Promote a customer satisfaction charter throughout the sector	**TPDCo, JTB, JHTA, MOT**	Years 1-3 Ongoing
		4.8.1.2 Ensure appropriate standards are developed and applied for each sub-sector	**TPDCo, JTB, JHTA, MOT**	Years 1-3 Ongoing
		4.8.1.3 Review standards periodically to ensure achievement of appropriate international benchmarks	**TPDCo, JTB, JHTA, MOT**	Years 1-3 Ongoing
		4.8.1.4 Enhance customer service	**TPDCo, JTB, JHTA,**	Years 1-3

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		throughout the sector	**MOT**	Ongoing
		4.8.1.5 Expand Team Jamaica programme	**TPDCo, MOT**	Years 1-3 Ongoing
		4.8.1.6 Develop Service Excellence programme	**MOT, TPDCo**	Years 1-3 Ongoing
		4.8.1.7 Support beautification of resort areas	**TPDCo, TEF**	Years 1-3 Ongoing
		4.8.1.8 Enhance levels of customer satisfaction throughout sector	**TPDCo, JTB, JHTA, MOT, private sector**	Years 1-3 Ongoing
	4.8.2:- Build marketing of tourism product around Brand Jamaica	4.8.2.1 Ensure Brand Jamaica emphasizing our music, and other culturally distinctive elements are at the core of tourism marketing programmes	**JTB**	Years 1-3 Ongoing
		4.8.2.2 Implement World Cup Cricket Legacy Programmes	**JTI, JTB, MYSC, MOT**	Years 1-3 Ongoing
		4.8.2.3 Implement Beijing Legacy Programmes	**JTI, JTB, MYSC, MOT**	Years 1-3 Ongoing
		4.8.2.4 Collaborate with national branding agencies to develop and implement national branding (Nation Brand Strategy)	**JTI, JTB, MYSC, MOT**	Years 1-3 Ongoing
		4.8.2.5 Identify positive attributes, people, culture, products, to be integrated into the destination branding strategy	**JTI, JTB, MYSC, MOT**	Years 1-3 Ongoing
		4.8.2.6 Develop and apply brand tracking capacity	**JTI, JTB, MYSC, MOT**	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	4.8.3:- Increase use of Jamaican inputs in tourism product	4.8.3.1 Encourage increased use of Jamaican design and materials in accommodations, craft and other tourism sub-sectors	**MOT, TPDCo, JMA, JIA, private sector**	Years 1-3 Ongoing
		4.8.3.2 Encourage increased use of local knowledge and expertise in planning and development of tourism sector	**MOT, JTB, TPDCo**	Years 1-3 Ongoing
		4.8.3.3 Encourage increased sustainable use of indigenous natural and locally manufactured products by tourism sector	**MOT, TPDCo, JMA, private sector**	Years 1-3 Ongoing
		4.8.3.4 Increase emphasis on interpretation and information about Jamaica to enhance visitor knowledge and experience	**MOT, JTB, TPDCo, JNHT, private sector**	Years 1-3 Ongoing
Goal # 5: A safe, secure, sustainably managed natural, social and built environment				
5.1:- A sector that protects and promotes the protection of natural and cultural heritage	**5.1.1:-** Motivate and encourage tourism stakeholders to value and support cultural and natural heritage	5.1.1.1 Regularly update and expand cultural resource inventory	**MYSC, JNHT, IOJ, JCDC**	Ongoing
		5.1.1.2 Develop incentives for adaptive reuse of historic resources and development and maintenance of historic sites	**MYSC, MFPS, JNHT**, IOJ, UDC, Private Sector	Years 1-3
		5.1.1.3 Undertake public education and awareness programme on importance of cultural and natural heritage	**MYSC, JNHT**, IOJ, JCDC, NEPA	Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		5.1.1.4 Promote environmental and social goals through awareness-building campaigns focused on a wide range of groups, including hotel owners, tour operators, tourists, government offices, school children and communities	MOT, NEPA, ENGOs	Years 1-3 Ongoing
		5.1.1.5 Provide funding support to aid the strategy of resource protection and heritage restoration including biodiversity conservation objectives	**TEF**, MYSC, MFPS, JNHT	Years 1-3 Ongoing
	5.1.2:-Ensure that the activities of the tourism sector support biodiversity conservation objectives	5.1.2.1 Implement programmes for awareness of biodiversity conservation	**NEPA, IOJ, ENGOs, MOT**	Years 1-3 Ongoing
		5.1.2.2 Strengthen partnerships and collaboration between tourism entities and resort area ENGOs for biodiversity conservation	**ENGOs, NEPA, IOJ, MOT**	Years 1-3 Ongoing
	5.1.3:- Ensure that natural and cultural heritage sites are managed appropriately and effectively over the long term	5.1.3.1 Undertake institutional strengthening for public and private agencies and ENGOs involved in management of natural and cultural heritage sites	MFPS, MYSC, MOHE, OPM, JNHT, NEPA, ENGOs, EFJ, JPAT, UDC	Years 1-3 Ongoing
		5.1.3.2 Strengthen partnerships and collaboration between tourism entities and natural and cultural heritage sites management	**Trade Associations, ENGOs, CBOs**	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		5.1.3.3 Develop preservation plans for cultural heritage sites	**JNHT,** private and public sector developers	Years 1-3 Ongoing
		5.1.3.4 Develop sustainable funding strategies and plans for management of natural and cultural heritage sites	**NEPA, JNHT, ENGOs,** MFPS, MYSC, MOHE, OPM, EFJ, JPAT, TEF	Years 1-3 Ongoing
5.2:- A sector whose development and operation take place within an effective health and environmental framework	**5.2.1:-** Promote the application of local sustainable development planning (LSDP) to resort areas	5.2.1.1 Rationalize resource management in tourism planning	**NEPA, local authorities**, MOHE, OPM, MOT	Years 1-3 Ongoing
		5.2.1.2 Participate in preparation of up-to-date development orders and plans for resort areas based on application of LSDP	**NEPA, local authorities, MOT, TPDCo, PDCs**	Years 1-3 Ongoing
		5.2.1.3 Plan for maintenance of desirable ecological balance in resort areas	**NEPA, local authorities, ENGOs**	Years 1-3 Ongoing
		5.2.1.4 Encourage all planning entities to consider the social, cultural, economic and environmental impacts of all tourism planning decisions and approvals at the micro (site) level	NEPA, MOT, JTI, local authorities	Ongoing
		5.2.1.5 Ensure assessment of potential impact of tourism infrastructure on resources valued for their aesthetic qualities	NEPA, JNHT, local authorities	Ongoing
	5.2.2:-Support the strengthening of enforcement of	5.2.2.1 Support the strengthening of the capacity and power of the regulatory and enforcement agencies to enforce compliance	NEPA, local authorities, ISCF, MNS, MOT	Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	planning and land development	5.2.2.2 Promote and encourage increased self-regulation and voluntary compliance by tourism entities	TPDCo, Trade associations, NEPA	Years 1-3 Ongoing
		5.2.2.3 Implement an effective enforcement strategy to detect and punish violations of government regulations	NEPA, local authorities, ISCF, MNS, MOT	Years 1-3 Ongoing
		5.2.2.4 Facilitate monitoring and enforcement of regulations by local communities & NGOs	MOT, NEPA, PCs, ENGOs	Years 1-3 Ongoing
	5.2.3:- Promote and support regional cooperation and compliance with international environmental agreements and conventions	5.2.3.1 Enact legislation and prepare, implement and monitor policies to ensure compliance with regional and international conventions	MOHE, OPM, MFAFT, NEPA	Years 1-3 Ongoing
	5.2.4:- Develop and apply multi-hazard mitigation measures for tourism sector	5.2.4.1 Use risk and vulnerability assessment and hazard mitigation mapping including GIS in planning and locating tourism developments	**ODPEM, NEPA, MOT, local authorities**, UWI, Mines and Geology Division	Years 1-3 Ongoing
		5.2.4.2 Encourage development of hazard mitigation plans for tourism entities	**ODPEM, TPDCo, Trade associations**	Years 1-3 Ongoing
		5.2.4.3 Ensure that the Building Code is used in designing new facilities and in retrofitting existing facilities to best meet possible specifications for natural hazard	**NEPA**, **local authorities, JHTA, JIE**	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
		mitigation		
		5.2.4.4 Establish institutional mechanisms to guide adaptation processes for climate change at sector and enterprise levels	**Min w responsibility for Environment**, OPM, MOT, NCCFP	Years 1-3 Ongoing
	5.2.5:- Ensure that waste, emission, water and energy are addressed in an integrated sustainable planning for the tourism sector	5.2.5.1 Support the preparation and implementation of a tourism natural resource use framework as part of a National Physical Plan to ensure availability of required services for tourism	MOT, TEF, UDC, NEPA, PIOJ	Years 1-3 Ongoing
	5.2.6:- Ensure that environmental management systems are implemented by tourism entities	5.2.6.1 Undertake phased introduction of minimum requirements for EMS in tourism legislation	**MOHE, OPM,** MOT, Trade Associations, TPDCo	Years 1-3 Ongoing
		5.2.6.2 Assist tourism entities to undertake environmental audits and access advice on implementing environmental improvements	**NEPA**, TPDCo, MOT, BSJ	Years 1-3 Ongoing
	5.2.7:- Ensure compliance with health and safety standards	5.2.7.1 Set national guidelines on health and safety standards and monitor and evaluate policies to ensure their effectiveness and conformance to best practice	**MOHE**, MOT	Years 1-3 Ongoing
		5.2.7.2 Increase capacity to enforce regulations and implement monitoring programmes	**MOHE**, MOT	Years 1-3 Ongoing
		5.2.7.3 Promote health and safety practices in sector	**MOHE, TPDCo**	Years 1-3 Ongoing

Outcomes	Strategies	Actions	Responsible Agencies and Stakeholders	Time-Frame
	5.2.9:- Promote road safety in resort areas	5.2.9.1 Consider pedestrian-only zones, parking outside central areas, increased use of bicycles for short trips and improved public transport to promote safety and reduce noise, congestion and pollution	**Local authorities**, NWA, MOT	Years 1-3 Ongoing
5.3:- A sector which is free from crime and violence	**5.3.1:-** Ensue that the implementation of the national security strategy addresses the concerns of the tourism industry	5.3.1.1 Develop and implement security plans for each resort area	**OPM, MNS**, Local authorities, PDCs	Years 1-3 Ongoing
		5.3.1.2 Develop and enforce security regulations in the tourism industry	**OPM, MNS**, Local authorities, PDCs	Years 1-3 Ongoing
		5.3.1.3 Develop and implement multi-pronged approach to address the issue of harassment in resort areas (see Dunn and Dunn)	**MOT, MNS, TPDCo**, Local authorities, PDCs	Years 1-3 Ongoing

Note: Responsible Agencies and Stakeholders **in bold** indicate the lead agencies for each action.

7. Appendices

7.1 Appendix 1 – List of Task Force Members

1.	Mrs. Karen Ford-Warner	Executive Director, TPDCo (Chairperson, Tourism Task Force)
2.	Mr. Wesley Van Riel	Senior Director, Strategic Planning, Ministry of Tourism (Vice-Chairperson/Chairperson, Tourism Task Force)
3.	Dr. Carolyn Hayle	Senior Programme Officer, Institute of Hospitality & Tourism, UWI
4.	Mr. Robert Stephens	Pragma Consultants Limited
5.	Mr. Roy Miller	Head, Corporate Services, Jamaica Tourist Board
6.	Mr. Barrington Payne	Director, Corporate Services, TPDCo
7.	Ms. Carol Straw	Investment Promotions Manager, Jamaica Trade & Invest (JTI)
8.	Mrs. Althea Heron	Senior Director, Tourism Policy and Monitoring, Ministry of Tourism (MOT)
9.	Mr. Karl Binger	Executive Director, Nature Preservation Foundation, Royal Botanical Gardens, Hope Gardens
10.	Mr. Donovan Dowie	Investment Manager, Urban Development Corporation
11.	Ms. Wendy Lee	Executive Director, Northern Jamaica Conservation Association (NJCA)
12.	Mr. Preston Jennings	MBJ Airports Limited
13.	Ms. Pauline McHardy	Consultant, Urban Planning
14.	Mrs. Susan Otuokon	Executive Director, Jamaica Conservation and Development Trust (JCDT)
15.	Mrs. Diana McIntyre-Pike	Countrystyle Community Tourism Network
16.	Mr. William Tatham	Vice President of Cruise Shipping and Marine Operation, Port Authority of Jamaica
17.	Mr. Ian Neita	Executive Director, Tourism Enhancement Fund
18.	Mrs. Violet Crutchley	Craft Coordinator, TPDCo
19.	Mrs. Pauline Levy	President, Jamaica Association of Travel Agents
20.	Mrs. Camille Needham	Executive Director, JHTA
21.	Mr. Basil Smith	Director of Tourism, Jamaica Tourist Board
22.	Mr. William McCalla	Jamaica U-Drive Association Limited
23.	Ms. Millicent Lynch	Unique Jamaica
24.	Mr. Anthony Beaumont	Director, Jamaica U-Drive Association Limited
25.	Mr. Gavern Tate	Director, Jamaica National Heritage Trust
26.	Mr. Alvin Brown	Secretary, Jamaica Union of Travellers Association
27.	Mrs. Laleta Davis-Mattis	Executive Director, Jamaica National Heritage Trust
28.	Ms. Gail Barrett	Jamaica Trade & Invest (JTI)
29.	Ms. Carla Gordon	Manager, Protected Areas, NEPA
30.	Mrs. Carole Guntley	Director General, Ministry of Tourism
31.	Ms. Tina Williams	Director of Product Facilitation, Ministry of Tourism

32.	Mrs. Imani Duncan-Waite	Director, My Tropic Escape
33.	Ms. Annette Tingle	Training Manager, TPDCo / HEART Trust/NTA
34.	Ms. Sheneka Brooks	JUTA
35.	Mr. Francisco Drummond	JUTA (Kingston Chapter)
36.	Mr. Bernard Blue	Co-ordinator, Protected Areas Branch, NEPA
37.	Mr. Glendon Harris	President, JCAL Tours
38.	Mr. Roderick Ebanks	Jamaica National Heritage Trust
39.	Mrs. Beryl Bennett	JHTA
40.	Mr. Leroy Williams	JCAL Tours
41.	Mr. Horace Peterkin	General Manager, Negril Sandals Beach Resort & Spa, JHTA
42.	Ms. Nicola Russell	Urban Development Corporation
43.	Mr. Michael Campbell	Jamaica U-Drive Association
44.	Ms. Michelle Thame	Consultant
45.	Mr. Sydney Bartley	Principal Director, Entertainment & Culture, MOT
46.	Mr. Paul Norman	Chukka Caribbean Adventures
47.	Mr. Clyde McKenzie	Chairman, Entertainment Advisory Board (EAB)
48.	Mr. Stafford Burrowes	Dolphin Cove
49.	Mrs. Marilyn Burrowes	President, Association of Jamaica Attractions Ltd. (AJAL) / Dolphin Cove
50.	Mr. Franklin McDonald	Sustainable Development Unit, UWI/UNEP
51.	Ms. Gloria Palomino	KMRB
52	Dr. Ian Boxill	University of the West Indies, Mona
53.	Mr. Kevin Hendrickson	General Manager, The Courtleigh Hotel and Suites
54.	Ms. Renee Robinson	JCDC
55.	Mr. Godfrey James	JCAL
56.	Mr. John Maxwell	NJCA
57.	Ms. Dawn Shields	Jamaica Tourist Board
58.	Ms. Nancy McLean	Jamaica Pegasus Hotel
59.	Mr. Paul Badresingh	TPDCo

PIOJ STAFF:

1. Mr. Richard Lumsden, Economic Development Specialist, Plan Development Unit
2. Ms. Karlene Mitchell, Technical Secretary, Tourism Task Force
3. Ms. Carole James, Recording Secretary, Tourism Task Force

Note: Positions of Task Force Members are given as at the time of their appointment to the Tourism Task Force.

7.2 Appendix 2 – List of Attendees at Tourism Workshop

ATTENDEES AT JAMAICA 2030 TOURISM TASK FORCE WORKSHOP HELD ON SATURDAY, JULY 21, 2007 AT THE ALMOND TREE RESTAURANT, OCHO RIOS, ST. ANN

PRESENT:

1.	Mrs. Karen Ford Warner	Executive Director, TPDCo (Chairperson, Tourism Task Force)
2.	Mr. Wesley Van Riel	Senior Director, Strategic Planning, Ministry of Tourism (MOT)
3.	Mrs. Camille Needham	Executive Director, JHTA
4.	Mrs. Carole Guntley	Director General, MOT
5.	Dr. Carolyn Hayle	Institute of Hospitality and Tourism, UWI
6.	Mr. Franklyn McDonald	Sustainable Development Unit, UWI/UNEP
7.	Mr. Fritz Pinnock	Executive Director, Caribbean Maritime Institute
8.	Mr. Robert Stephens	Consultant, Pragma Consultants Limited
9.	Mrs. Diana McIntyre-Pike	Countrystyle Community Tourism Network
10.	Mr. Karl Binger	Executive Director, Nature Preservation Foundation, Royal Botanical Gardens, Hope Gardens
11.	Mrs. Susan Otuokon	Executive Director, Jamaica Conservation Development Trust
12.	Mr. Burchell James	TPDCo St. Ann/St. Mary Resort Board Chairman
13.	Ms. Vana Taylor	Executive Director, JAVA
14.	Mr. Michael Morris	Secretary/Manager, St. Ann Parish Council
15.	Mr. Francisco Drummond	Treasurer, JUTA
16.	Mrs. Althea Heron	Senior Director, Tourism Policy and Monitoring, MOT
17.	Mr. Donovan Dowie	Investment Manager, Urban Development Corporation
18.	Mr. Carlton Wedderburn	Ministry of Agriculture and Land
19.	Ms. Millicent Lynch	Unique Jamaica
20.	Mr. Leroy Williams	Secretary, JCAL Tours
21.	Ms. Janet Dwyer	HEART Trust/NTA
22.	Mr. Stafford Burrowes	Dolphin Cove / (AJAL)
23.	Mrs. Marilyn Burrowes	President, AJAL
24.	Mrs. Judy Schoenbein	Appleton Estate Rum Tour/ JHTA
25.	Mr. Jag Mehta	Special Adviser to the Chairman, Superclubs
26.	Mr. Barry Bonitto	Countrystyle Tourism Network & Backam Group International
27.	Ms. Geri Roy	TPDCo, Ocho Rios
28.	Mr. Paul Norman	Resort Marketing Manager, Chukka Caribbean Adventures
29.	Ms. Danila Chen	Cruise Operating Manager, Chukka Caribbean Adventures
30.	Mr. Sydney Bartley	Principal Director, Entertainment & Culture, MOT
31.	Mr. Clyde McKenzie	Chairman, Entertainment Advisory Board (EAB)
32.	Mr. Gavern Tate	Director, Jamaica National Heritage Trust

PIOJ STAFF:

1. Mr. Richard Lumsden, Economic Development Specialist, Plan Development Unit
2. Ms. Karlene Mitchell, Technical Secretary, Tourism Task Force
3. Ms. Carole James, Recording Secretary, Tourism Task Force
4. Ms. Carmen Miller, Communications Specialist, National Development Plan
5. Ms. Keisha Tingling, Technical Officer, PIOJ

7.3 Appendix 3 – Listing of Task Force Meetings

1. Tuesday, May 29, 2007
2. Wednesday, June 6, 2007
3. Wednesday, June 13, 2007
4. Wednesday, June 20, 2007
5. Wednesday, June 27, 2007
6. Wednesday, July 4, 2007
7. Wednesday, July 18, 2007
   Saturday, July 21, 2007 (Tourism Stakeholder Workshop)
8. Friday, July 27, 2007
9. Thursday, August 9, 2007
10. Wednesday, August 15, 2007
11. Wednesday, August 29, 2007
12. Wednesday, September 5, 2007
13. Wednesday, September 12, 2007
14. Wednesday, September 19, 2007
15. Wednesday, September 26, 2007
16. Wednesday, October 3, 2007
17. Wednesday, October 31, 2007
18. Wednesday, November 7, 2007
19. Wednesday, November 14, 2007
20. Wednesday, December 19, 2007
21. Wednesday, January 16, 2008
22. Wednesday, January 23, 2008
23. Wednesday, June 18, 2008
24. Wednesday, July 9, 2008
25. Wednesday, July 23, 2008
26. Monday, August 25, 2008
27. Wednesday, November 12, 2008

7.4 Appendix 4 – List of Acronyms and Abbreviations

AJAL	Association of Jamaica Attractions Limited
BRIC	Brazil, Russia, India, China
BSJ	Bureau of Standards Jamaica
CBO	Community Based Organization
CO	Cabinet Office
CTO	Caribbean Tourism Organization
DBJ	Development Bank of Jamaica
DMC	Destination Management Company
EFJ	Environmental Foundation of Jamaica
EMS	Environmental Management Systems
ENGO	Environmental Non-Governmental Organization
EP	European Plan
ESSJ	Economic and Social Survey Jamaica
GDP	Gross Domestic Product
GOJ	Government of Jamaica
HEART/NTA	Heart /National Training Agency
IAAF	International Association of Athletics Federations
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
IHT	Institute for Hospitality and Tourism
IMBJ	Incorporated Master Builders of Jamaica
IOJ	Institute of Jamaica
ISCF	Island Special Constabulary Force
Jamvac	Jamaica Vacations
JAS	Jamaica Agricultural Society
JAVA	Jamaica Association of Villas and Apartments
JBDC	Jamaica Business Development Centre
JCA	Jamaica Cricket Association
JCAL	Jamaica Co-operative Automobile and Limousine Tours Ltd.
JCTU	Joint Confederation of Trade Unions
JEA	Jamaica Exporters' Association
JEF	Jamaica Employers' Federation
JFF	Jamaica Football Federation
JHTA	Jamaica Hotel and Tourist Association
JIE	Jamaican Institute of Engineers
JMA	Jamaica Manufacturers Association Limited
JNHT	Jamaica National Heritage Trust
JOA	Jamaica Olympic Association
JPAT	Jamaica Protected Areas Trust
JSIF	Jamaica Social Investment Fund
JTB	Jamaica Tourist Board
JTI	Jamaica Trade and Invest
JUTA	Jamaica Union of Travellers Association

KCCIC	Kingston City Centre Improvement Company
KMA	Kingston Metropolitan Area
LSDP	Local Sustainable Development Planning
MEM	Ministry of Energy and Mining
MFAFT	Ministry of Foreign Affairs and Foreign Trade
MFPS	Ministry of Finance and the Public Service
MIIC	Ministry of Industry, Investment and Commerce
MIND	Management Institute for National Development
MLSS	Ministry of Labour and Social Security
MNS	Ministry of National Security
MOAF	Ministry of Agriculture and Fisheries
MOE	Ministry of Education
MOHE	Ministry of Health and Environment
MOT	Ministry of Tourism
MSMEs	Micro-, Small and Medium-Sized Enterprises
MTW	Ministry of Transport and Works
MWH	Ministry of Water and Housing
MYSC	Ministry of Youth, Sport and Culture
NCCFP	National Climate Change Focal Point
NCTVET	National Council on Technical Vocational Education and Training
NEPA	National Environment and Planning Agency
NHT	National Housing Trust
NGO	Non-Governmental Organization
NJCA	Northern Jamaica Conservation Association
NWA	National Works Agency
NWC	National Water Commission
ODPEM	Office of Disaster Preparedness and Emergency Management
OPM	Office of the Prime Minister
PAJ	Port Authority of Jamaica
PDC	Parish Development Committee
PIOJ	Planning Institute of Jamaica
PPP	Public Private Partnership
PRDCL	Port Royal Development Company Limited
RADA	Rural Agricultural Development Authority
SADCO	St. Ann Development Company Limited
SDC	Social Development Commission
STATIN	Statistical Institute of Jamaica
TEF	Tourism Enhancement Fund
TPDCo	Tourism Product Development Company Limited
UCJ	University Council of Jamaica
UDC	Urban Development Corporation
UNEP	United Nations Environment Programme
UWI	University of the West Indies
UNWTO	United Nations World Tourism Organization
WTTC	World Travel and Tourism Council

7.5 Appendix 5 – References and Selected Bibliography

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