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Regional Spotlight

Re-inventing, revolutionizing and transforming Caribbean tourism: Multi-country regional institutions and a research agenda

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ABSTRACT

The purpose of this regional spotlight is to consider the state of Caribbean tourism and changes that are needed to improve the benefits to be derived from the tourism sector in the region. For a region that is heavily dependent on tourism, the Caribbean has been lagging behind in spreading tourism benefits across the region's economies. A politically stable region, with world-class accommodation stock and declining oil prices, means that the Caribbean tourism industry has a very positive outlook. However there seems to be a disconnect between the fortunes of tourism and the development of largely small-island states in the region. Tourism in the Caribbean region requires re-assessment and change for sustainable benefits.

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1. Introduction

With an estimated 28.2 million tourists, 26 million cruise passengers arriving in 2015, and an estimated expenditure of US \$34.3 billion (Caribbean Tourism Organization (CTO), 2016), there is no doubt of the Caribbean's prominence in the international tourism market. Tourism success has resulted in several Caribbean countries improved performance as Aruba's tourist arrivals passed the 1 million mark, Jamaica's tourist arrivals the 2 million mark, and double-digit growth in arrivals was achieved by the Aruba, Barbados, Cuba and Haiti (CTO, 2016). There is renewed confidence within the Caribbean tourism industry, with major investments in room stock by Baha Mar, The Bahamas and Sandals Resorts International, Jamaica. Further growth is anticipated with a planned expansion of Jamaica's room stock by 1600 new rooms over the next 18 months (Jamaica Information Service, 2015).

In the Caribbean, the transformation of sugar-based economies to tourist destinations has been remarkable (see Holder, 2013; McLeod, 2015). However, while some Caribbean countries are progressing with tourism development, others are experiencing a reduction in tourist arrivals, including Bermuda, Dominica, Guadeloupe, Martinique, the US Virgin Islands and Suriname. The sustained performance in the tourism sector across countries has

been lagging behind and there is need to consider a 'new regionalism' (Croes, 2006).

2. Multi-country regional institutions

This regional spotlight considers changes that are needed to improve the fortunes of the tourism industry in the Caribbean archipelago (Fig. 1). These changes are proposed within a framework of destination marketing and management at a multi-country regional level and concern regional institutions such as the Caribbean Tourism Organization (CTO) and the Caribbean Hotel and Tourism Association (CHTA). Hon. Richard Sealey, Chairman of the CTO, an organization that has been in existence since 1989, notes

... if we are to keep the visitors coming, if we are to maintain interest in our region, if we are to withstand the strong competition from both emerging destinations and our own source markets, we must make the right investments in our infrastructure, we must make travel to and through the Caribbean as hassle-free as possible, we must make tourism profitable for our people and for our partners (Sealey, 2015, p. 3).

Based on Sealey's pronouncement regarding infrastructure, extra- and intra-regional travel and profitability, a road map framing the next steps to be taken in developing multi-country destinations in a region is outlined. The road map considers the

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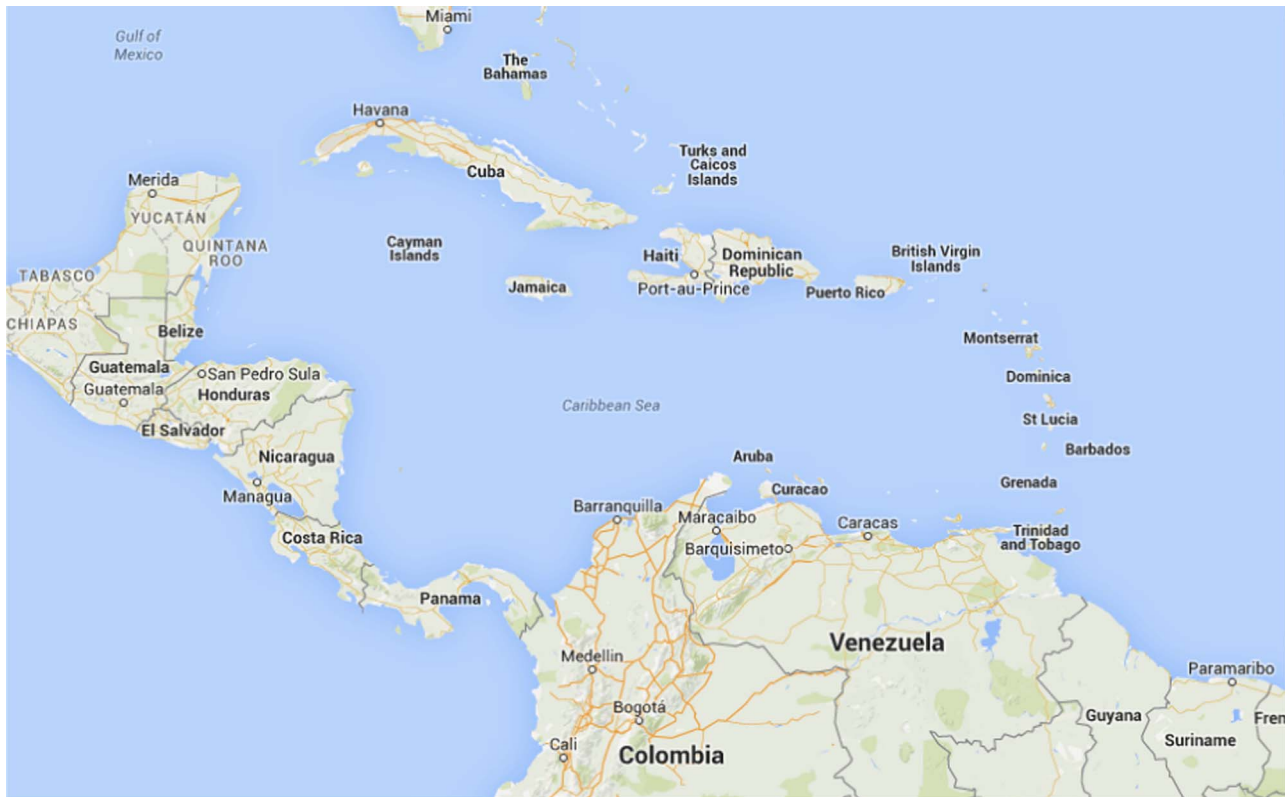


Fig. 1. Map of the Caribbean archipelago.

Source: AnthroScape Human Biodiversity Forum (2015).

policy, practice, procedure and initiatives that are needed to re-invent, revolutionise and transform Caribbean tourism and forge a new path for tourism development in the region.

3. Improving Caribbean tourism

General and basic infrastructure is needed to enhance a tourism destination's appeal (Ritchie & Crouch, 2003). Some Caribbean destinations find it a challenge to provide the needed supporting resources to ensure destination success. Although, recent changes in the relationship between Cuba and United States of America can transform the face of Caribbean tourism, particularly with the re-entry of Cuba on the Caribbean tourism landscape, Hingtgen, Kline, Fernandes and McGehee (2012) draw attention to the physical infrastructural barriers in Cuba that require attention, including transportation, communications, utilities, housing, safety and landscape. Additionally the adequacy of energy and water services within the tourism sector is of particular concern. Gössling (2015) highlights water management in tourism and the need for greater focus on both direct and indirect water consumption, such as in food production. In addition, there are concerns with infrastructure for local community tourism development and for the utilisation of cultural resources for tourism development.

In the Caribbean region, inter-island transport requires attention, as transport markets have been dominated by monopolies (Briceno-Garmendia, Bofinger, Cubas, & Millan-Placci, 2015). Efforts have been made to provide low-cost transport in the region such as REDjet but according to Holder (2013) the low-cost carrier model has not taken hold in the Caribbean. Challenges in Caribbean air-transport may be linked to the nature of the regional airline business that is characterised by public-ownership (Holder, 2010), high operating costs, the small size of the islands, especially

those in the Organization of Eastern Caribbean States (OECS) and small markets, along with the tendency to make individual decisions to attract international tourists directly instead of cooperatively (Bofinger & Placci, 2013). For example, Andrew (2011) makes the point that a combination of the over-supply of ports, weak management and small populations runs counter to an atmosphere that facilitates economies of scale.

Although the region is heavily dependent on intra-regional transport for tourism and trade, there has been little consideration of developing an intra-regional hub. An intra-regional hub and spoke network will better facilitate the 'hassle-free' travel that Sealey (2015) mentions. The Bofinger and Placci (2013) study recommended the development of two hubs to address the connectivity and competitiveness issues: one in the north and one in the south. The study also recommended that consideration should also be given to the development of one regional hub at a central island. Critical to this process is collaboration among the independent states. This supports the recommendation of the San Juan Accord 2007, attended by Ministers from CTO member states responsible for Tourism and Transportation, which identified the need for a regional approach to ensure sustainability along with the harmonising of aviation policy in the region (Andrew, 2011; Caribbean Tourism Organization, 2007). Additional recommendations included the revision of the CARICOM Multilateral Air Services Agreement, liberalising of the regional air space and the creating a single air space. The target to implement these recommendations was between February 2008 and September 2008 (Caribbean Tourism Organization, 2007). Despite the need for policy change and recognition of the challenges relating to aviation in the region, there is no evidence that these have been implemented, except for the revision of the CARICOM Multilateral Air Services Agreement in 2010 (Andrew, 2011).

Profitability in tourism is concerned with the net benefits of tourism activity. Notwithstanding the economic, social and

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