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TOURISM MARKETING: INSIGHTS FROM THE CARIBBEAN

GUEST EDITORS

Trevor A. Smith and ***Oniel Jones***

CONTENTS

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EDITORIAL

THE editorial committee takes great pleasure in welcoming you to the December 2007 special issue of IDEAZ. The purpose of this issue, *Tourism Marketing: Insights from the Caribbean,* is to provide insights into factors and issues relevant to tourism marketing and to underscore the importance of tourism to sustainable development within the region.

The Caribbean continues to be a significant player in world tourism – 5% of the global pie; while tourism continues to be a major player in Caribbean economies. In 2004 Clayton and his colleagues noted that regional tourism contributed 4.5% of GDP directly; and 14.8% was directly or indirectly derived from the industry. The forecast to 2014, they noted, is that direct contributions could approximate 5.2% of GDP with contributions to be derived estimated at 16.5%. On this basis, the importance of tourism to the region cannot be overemphasized, and this special issue is aimed at bringing tourism marketing under the spotlight by presenting renewed insights into tourism products and offering strategies and recommendations for sustainable development.

The issue begins with a look at "Demographic Factors that Influence Tourists' Vacation Choice". This contribution, authored by Densil Wiliams, Derrick Deslandes and Damion Crawford, provides an empirical investigation into the vacation choice-making process and shows that age, gender and income are the most important factors that determine vacation choice among tourists.

The second article, "McDonaldization, Mass Customization and Customization: An Analysis of Jamaica's All-inclusive Hotel Sector" is presented by Anne Crick and Archibald Campbell. This article begins by tracing the evolution of Jamaica's all-inclusive hotels and continues with an analysis of these hotels using three service models: McDonaldization, mass customization and customization. In this analysis, all-inclusive hotels are placed on a continuum of service quality from McDonaldized hotels which offer value for money to customized hotels, the very high end of the market, offering luxury in an exclusive setting.

Next, Trevor Smith presents a study entitled "Destination Choice and Levels of Satisfaction with Jamaican All-Inclusive Hotels". The objective here is to provide insights for tourism marketers and other tourism interests into marketing the all-inclusive package. The findings indicate that the weather, beach front properties and friendly people are the top three reasons for choosing Jamaica as a tourist destination. Additionally, friendly staff, ambience of beach front properties, service at bars and comfortable and relaxing environment are the most satisfying experiences among Jamaican all-inclusive hotel visitors.

In the fourth article "Accommodating Uncertainty and Minimizing Risk: Can Foresighting and Scenario Planning Provide a more Durable Basis for Sustainable Tourism Development in the Caribbean?" K'adamawe K'nIfe examines the usefulness of foresighting and scenario planning in the context of sustainable tourism and argues that the utilization of these strategic tools could offer a mechanism through which regional planners can anticipate and/or shape possible futures for sustainable tourism and regional sustainable development.

The book reviews in this special issue provide commentary on two relatively new tourism books. First, Tanzia Saunders reviews David Edgell's *Managing Sustainable Tourism: A Legacy for the Future*. The review introduces us to the interesting work being done in the area of sustainable tourism and provides a synopsis of the book chapters, along with other highlights, in a well written assessment of Edgell's work. Secondly, Oniel Jones and Tanya Francis review Boxill et al.'s *Tourism and HIV /AIDS in Jamaica and the Bahamas*. The relevance and timeliness of this work is brought into sharp focus, and the authors' espousal of the Caribbean 'vernacular' was seen as a distinctive feature by the reviewers.

Finally, we would like to express thanks and sincere gratitude to the journal reviewers who were so generous with their time; to the contributors for the quality work presented; and to the members of the editorial committee for their assistance in editing, logistics and administrative support.

Trevor A. Smith *and* Oniel Jones

Guest Editors

Demographic factors that influence tourists' vacation choice

Densil A. Williams
Derrick D. Deslandes
and Damion Crawford

This paper reports an empirical investigation into the vacation choice decision making process by tourists. Using decision theory as the guiding conceptual framework, it analyses the demographic factors that differentiate between whether or not a tourist takes a cruise-based vacation versus a land-based vacation. Data collected from a survey of 1,279 tourists were analysed using the logistic regression model. The results reveal that age, gender and income are the most important factors that determine vacation choice among tourists. These results can be used by marketing personnel in both the cruise- and the land-based sectors to plan marketing programmes and segment their advertisements to different profiles of tourists.

KEY WORDS:

tourists

vacation choices

cruise ship

land-based

INTRODUCTION

The decision to take a vacation is not an effortless process. When tourists are motivated to take a vacation there are a number of decisions that follow this initial motivation. Decisions will have to be made as to how long to stay on vacation, the price of travel, where to vacation (destinations), how much money to spend while on vacation, which restaurant(s) to eat at, which travel agents to use and, also, decisions as to the choice of vacation, i.e. land-based or cruise-based. These decisions, however, are impacted by both behavioural and economic factors. However, the extant literature does not pay much attention to how these factors influence the decisions governing vacation choice. Much of the work in the travel and vacation literature focuses on the destination the tourist chooses, and the economic impact of tourist expenditure (e.g. Ennew, 2003; Jaakson, 2004). Very little is written about the vacation choice, i.e. land-based versus cruise-based vacation. This paper will contribute to this sparse literature by looking at the demographic factors that influence tourists' decision to choose land-based over cruise-based vacations or vice versa.

Using decision theory as its analytical framework, the paper will try to answer the question: What demographic variables influence the decision to choose cruise-based vacations over land-based vacations? The remainder of the paper is therefore organized as follows: an overview of the cruise ship sector is presented; the analytical framework that will be used to generate explanations and draw conclusions based on the data analyses then follows. As far as possible, the paper will report on the theoretical and empirical works in this area. The next sections of the paper then focus on the method that will be used to shed light on the research problem, the research results, the discussion of the results and, finally, some concluding remarks.

OVERVIEW OF THE CRUISE SHIP SECTOR

A cruise ship is a controlled safe pleasurable environment with a wide range of recreational facilities. The sector has grown quite rapidly over the last 30 years. Indeed, over 11 per cent of American households took a cruise vacation in 2000 (Hentrophe, 2000). The length of a cruise varies from 2 to 3 days to round-the-world. Further, 3, 4 and 7 day cruises are most critical, with others of 10, 14, and 21 days.

The cruise ship market is dominated by two main firms: Carnival Corporation and Royal Caribbean International. These firms account for over 80 per cent of the market. Further, with Carnival's takeover of *Princess Cruise*, it makes Carnival the world's largest cruise ship company. A major activity on these cruises is a shore visit to a port. Although cruise ships make many port stops, the majority of their passengers stay on board. This occurs in most cases because tourists want to stay in the safe and controlled cruise environment (Jaakson, 2004). This has forced many cruise liners to buy private islands (e.g. Royal Caribbean International owns fenced off property in Labadee, Haiti). They also have private clubs in ports for the exclusive use of their passengers. The big debate therefore in tourism circles is whether or not these cruise liners add significant economic benefits to the destination countries. It is estimated that tourist expenditure from cruise liners is normally lower than expected and the economic benefits are quite modest (Jaakson, 2004).

The debate between providers who supply land-based tourism and cruise ship tourism is quite intense. The main thrust of the debate is whether or not cruise tourism offers greater economic benefits to a destination than land-based tourism. One side of the debate argues that cruise tourism imposes local costs without the compensating benefits. The other side of the argument posits that land-based visitors generally discover their destinations through cruise ship vacation. Indeed, Pattullo (1996: 159) captures this debate succinctly by stating that:

> While the cruise lines steam ahead, unloading more and more passengers off bigger and more luxurious ships on the docksides of small Caribbean states, fundamental questions have begun to be asked about the benefits of the cruise ship sector to the Caribbean and its people, and its long term effect on the region's land-based tourism.

Land-based operators also argue that cruise ship operators have far more resources with which to operate and as such they have a stronger competitive advantage in promoting themselves. In addition, it appears that their advertising is geared towards highlighting their superiority over land-based holidays. This is evidenced by their immense presence on television and in the print media in North America and also by the subliminal messages sent by executives of cruise lines. Indeed, one of Carnival's executives, Bob Dickinson, mentioned in one of their brochures that, "the ship is the attraction not the port of call" (Pattullo, 1996:169). This resource constraint was also highlighted by one of Jamaica's tourism moguls, John Issa. He suggested that cruise lines had an unfair advantage over land-based tourism in terms of duties. As such, he called on the policy makers to review the application of taxes in the tourism industry (Jamaica's Ministry of Tourism, 2004). Furthermore, cruise lines are also now targeting niche markets which have traditionally belonged to the Caribbean's land-based product. No longer are they only targeting the old and the rich, but they are now pursuing the young, families, honeymooners and the convention market, and hosting theme cruises around sports, music and education (McKee, 1998). The important question therefore that needs to be explored is: What factors influence vacationers' choice of land-based vacations over cruise vacations? This question is at the heart of this paper.

The cruise ship debate although intense, misses a fundamental issue. It generally focuses on expenditure and income generated from cruise ships by port communities. The debate does not focus on the decision making process that leads to one vacation choice been chosen over another. Indeed, Jaakson (2004) argues that research is needed on how social, economic and other variables impact tourist activity. This analysis is critical as it will help operators segment their markets better and target the right customers. This is especially important for land-based operators who complain that they do not have sufficient resources to compete with the cruise sector. Indeed, with limited funding, land-based operators will want to focus their marketing strategies in order to attract the right potential customers. This paper focuses on commonly used demographic profiles cited in the travel and vacation literature to determine their influence on the choice of vacation that a vacationer chooses. Before these variables are analysed, the approach used to guide this study is presented below.

ANALYTICAL FRAMEWORK

To understand how and why vacationers make the choice between land-based vacations and cruise vacations, some general theoretical framework about decision making will have to be explored. There are various theoretical approaches that have been used to study decision making by tourists (Halperin et al., 1984; Rushton, 1969). However, this paper will use the decision theory as its framework for analysing vacation choice among tourists. This framework follows the tradition of the destination choice literature and thus allows us to better compare this study with those done in other locations in order to derive a comprehensive understanding of decision choice among tourists. While the review on decision theory will not be extensive, it will focus on areas germane to the main issues in this study (see Edwards et al. [1965] for a comprehensive review of decision theory).

DECISION THEORY

The field of decision theory is concerned with arriving at a conclusion based on differential choice process that is derived from a variety of needs, backgrounds and expectations. Decision making is generally based on two approaches: a) the traditional deterministic approach, and b) a probabilistic approach based on randon-utility theory. The deterministic approach posits that individuals being economically rational will choose the alternative that gives them the greatest utility. When this is applied to the choice of land-based versus cruise-based vacations, the interpretation is that the tourist will make the choice that provides the greatest utility or attractiveness regardless of other demographic or expectation factors. On the other hand, the probabilistic approach argues that choice among the various alternatives is probabilistic and that the utility derived actually constitutes probabilities. In essence, this approach suggests that utility derived from a choice is comprised of both rational and irrational elements.

Applying these theoretical considerations to explain tourists' choice of land-based over cruise-based vacation or vice versa, the old concept of the 'economic rational man' and non-rational factors, i.e. the behavioural probabilistic approach (e.g. weather, quality of services, attitude of the host, etc.) are considered. Using these theoretical approaches, the tourist vacation choice decision can be mapped as follows: The tourist is motivated by some push factors (e.g. need for relaxation) to take a vacation. The tourist then makes a decision to go on a land-based vacation or a cruise-based vacation – a decision that will be based on an assessment of behavioural as well as economic factors. An understanding of how these factors impact land-based over cruise-based vacation choices or vice versa is the main focus of this paper. The discussion below highlights the influence of selected demographic factors on the decision to choose one vacation option over the other. The demographic factors chosen are based on what the current literature identifies as important factors that influence decision making by tourists.

DEMOGRAPHIC FACTORS AND DECISION MAKING BY TOURISTS

Numerous factors explain why tourists travel to various destinations and why they make one vacation choice over another. New experiences, physical maturation associated with ageing, gender, financial constraints, media (print and electronic), marital status, country of residence, etc. are all found to significantly impact destination choice and by extension vacation choice (Kelly, 1977; Gitelson & Kerstetter, 1992).

Researchers have investigated the relationship between age and vacationing behaviour and economic variables such as income and liquid assets in order to better understand the vacation behaviour of US consumers (Peterson, 2007). Other researchers have also shown that life cycle, along with other factors, influence travel behaviour (NFO Plog Research, 2000). They have found that younger people and families usually have fewer dollars to spend on vacation and travel choices that include escorted tours and fine dining since those options tend to be more expensive. Indeed, income is one major factor that determines the choice of a vacation after the motivation to take the vacation is determined. The tourist income elasticity of demand will determine whether or not a land-based or a cruise-based vacation is chosen. Indeed, researchers such as Moschis et al. (2000) have used income thresholds to identify older adults with an expensive taste. In this case, adults of age 55 and over with an income of US $50,000 per year were identified as upscale. Further, Peterson (2007) reveals that the effect of economic variables dominates that of age. The findings also show that seniors aged 55-74 have similar vacation patterns to those persons who were 35-54 years of age. For the younger age group, out-of-town vacation without lodging could be explained by their inclination to stay with friends or family, or an increased interest in camping. For the older age group, fewer vacations could be due to frail health, increased dislike for the stresses of travel or an increased dislike for disruptions to home life. However, based on the study, it was seen that the effects of economic variables (income and assets) outweigh the effects of age on vacationing. Income and assets had more significant effects than age in explaining out-of-town behaviour with lodging and not taking an out-of-town vacation at all.

Other age related studies have focused on children's influence on vacation decisions (Nickerson & Jurowski 2001; Gram, 2007) and travel decisions of seniors and students (Reece, 2004; Kim et al. 2006). Nickerson and Jurowski (2001) highlight the fact that children's influence on buying decisions has increased because of demographic and sociological changes and vacations are used as family time to reconnect with children. While the influence of children may have increased, it is still limited as they have little say in matters such as how much to spend, where to make the purchase and the final decision of whether or not to purchase (Beatty & Talpade, 1994). In addition, children's influence may be dependent on parental employment status and product importance and usage (Beatty & Talpade, 1994). A Hong Kong study revealed that a large number of tourists in the Asia-Pacific area are between the ages of 10 and 19 and may represent a new market. This market is not interested in price or quality but is looking for something new that is fun and humorous (Edwards, 1994). Further, Gram (2007) and Nickerson and Jurowski (2001) show that children have a more indirect role in the decision making process for vacations. Parents are in charge of major decisions, such as how much money to spend and what is best for everyone. Children only have an impact on the decision making process because they are allowed to take part.

An important part of the debate age and its impact on vacation behaviour is how college graduates make vacation decisions. It is estimated that the youth travel market is increasing by almost 5 per cent annually and the growth rate is higher than the average annual growth for the general tourism market which was 2.7 per cent in 2002 and 1 per cent the previous year (WTO, 2004). The Federation of International Youth Travel Organizations revealed that 20 per cent of tourist arrivals are youth travellers that amount to approximately 140 million per year. These numbers have prompted studies to investigate travel behaviour and motivating factors among student tourists. Kim et al. (2006) identifies the push and pull factors influencing students' international travel decisions. The main push factors include 'escape', 'seeing and learning', 'adventure and thrill', indulgence', 'nature' and 'fun and entertainment'. On the other hand, pull factors include 'sun and beaches', 'time and cost', 'sports', 'attractions', 'family' and 'natural environment'.

Other studies have also focused on senior travellers (Shoemaker 1989, 2000; Javalgi et al. 1992) and have found different results. For example, senior travellers have been found to have less education and to differ in their reasons for travelling and modes of travel than non-senior travellers (Javalgi et al., 1992). Reece (2004) studied the differences between senior and non-senior travellers in relation to their reasons for leisure trips to South Carolina, and found that there were few in number. In addition, seniors who are homeowners may have a lower average household income but a higher spending income than all other age groups. Further, researchers have also recognized that older tourists are more likely to take a vacation that involves guided tours, as it appears to be much safer (Quiroga, 1990).

Besides economic factors and age, behavioural factors are also deemed important in the decision making process for tourists' vacation. Indeed, researchers have posited that non-economic factors better explain vacation behaviour among tourists in the age groups 21-34 and 75-98 (Peterson, 2007). Gender-based factors have become a critical variable in the decision on vacation choice.

Research on the gender factor argues that women have a more dominant position in the vacation decision making process (Gram 2007). Indeed, females are seen to be more integral in collecting information about a vacation and thus have some say in planning the vacation (Zalatan, 1998). Males normally make decisions such as the day of the vacation, amount of money to be spent, length of stay, and so on (Ritchie & Filiatraatt, 1980). However, Lawson (1994) draws attention to the fact that much travel and vacation behaviour is based on group (especially family) and is not individual in nature and as such gender is not an important segmentation variable. Marshment (1997) confirms this by stating that tourism is not constructed along gender lines.

Travel differences are however depicted as preferences for travel experiences that differ by gender. Travel decisions usually differ for men as they seek action and adventure while women generally search for cultural and educational experiences (Mieczkowski, 1990). In this regard, it is more likely that men will travel for a sports event (Hall 1992, 1994) and women would travel on a package tour or choose a destination for shopping or to visit friends and relatives (McGehee et al., 1996). Studies in the mid 1980s reveal that husbands dominate the decision making process in families where children are present. Fodness (1992) refutes this finding, claiming that women are the decision makers when children are involved. Nicohols and Snepenger (1988) show that where women plan vacations, there are fewer sport related activities, shorter trips and less money spent. Collins and Tisdell (2002) studied the importance of travel cycles according to purpose and gender. They argue that life cycle travel patterns vary according to purpose of travel, and that purpose and gender are significant factors in predicting long-term demand for travel. Swaine (1995) reveals in his study investigating gender and tourism that in terms of vacationing, women tend to understand what constitutes a holiday. Blood and Wolfe (1968), however, point out that for 68 per cent of vacationing couples, decisions were equally made.

Mottiar and Quinn (2004) question whether there are distinctive roles for men and women in the decision making process for vacations. They found that there are clear differences between males and females in the decision making process. The initial decision making process is dominated by females and joint decisions are made in the middle of the process. The holiday choice is affected when women gather the initial information needed for vacations. It is evident where women highlight ‘eating out’ and ‘experiencing different cultures’ as the best things about travelling. Both males and females, however, stated that the reasons for a particular holiday were sunshine and better weather. Indeed, due to the changes in sex roles, current and future vacation planning may be less likely to be a joint decision.

Mills (1991) pionts out that in the past, middle class women dominated the group of women who travelled because they had the time, finances and social network for travel. Chiang and Jogaratnam

(2006) confirm previous studies that women's travel experiences differ significantly from men. Leeming and Tripp (1994) reveal in their study that younger women travel for adventure, and physical activity is not expected from their trips. In addition, Pennington-Gray and Kerstetter (2001) show that university educated women seek to relax, socialize, get together with family, shop and take part in physical activity as they take their vacations. Further, Chiang and Jogaratnam (2006) in their study of the motivations for women who take solo trips find that the five main factors influencing their decision making are experience, escape, relaxation, social networking and self-esteem. The most significant factor is 'experience.' In this case, women take solo trips because it allows them to explore and learn new things. This is consistent with the findings of McArthur (1999) who deduces that women travelling solo usually stay in low price hostels, eat local food and go by backpacking.

In so far as the literature identifies the critical variables that impact decision making in tourist vacation behaviour, these same variables are used to test their impact on vacation choice. In addition to those identified in the literature, media preference and country of residence are also added to this analysis. The type of media that tourists get their news and information from greatly influences their choice in regard to land or cruise vacationing. The choice that is most heavily advertised will more than likely be the one that tourists are attracted to, once it falls within the constraints of other factors such as income, preferences, etc. Furthermore, the country that the tourist is from will also determine vacation choice decisions. Those from countries with higher disposable incomes will possibly choose more expensive vacations compared to those from countries with lower disposable incomes. These assumptions about the impact of demographic variables on vacation choice will be tested in this paper.

RESEARCH METHOD

The data for this research were collected from passengers on cruise-based vacation to Jamaica and from tourists on land-based vacation. A total of 1,279 questionnaires were collected from visitors in the resort areas of Ocho Rios, Montego Bay and Negril, comprising 802 respondents from land-based tourists and 477 from cruise-based tourists. The development of the questionnaire was heavily motivated by the current travel and vacation literature. The questionnaire captured information such as subjective factors influencing the decision to take a particular type of vacation, toursits' satisfaction with the destination, their satisfaction with the level of services received, and demographic profile of the tourists. This article, however, focusses only on the demographic factors as they are the only ones that are similar for both the land-based and cruise-based tourists.

The demographic factors examined in this paper are: (i) age as measured by number of years. Respondents were given categories starting from those aged 16-25. It was important to restrict responses to this age group and over so as to ensure that the respondent was the person who took the vacation decision; (ii) gender, a categorical variable with 1 being male and 0 being female; (iii) income; this was measured as a category variable with the lowest category being under US$20,000 per annum; (iv) media preference; this included both print and electronic media (e.g. newspapers, TV, radio, magazines, Internet); and (v) country of residence.

Table 1 below provides a basic description of these variables.

Table 1: Descriptive statistics on demographic factors

Variables	Frequency	Per cent
Vacation Choice		
Land	802	63
Cruise	477	37
Total	1279	100
Gender		
Male	432	39
Female	678	61
Total	1110	100
Age		
16-25	206	17.5
26-35	377	32.1
36-45	294	25.0
46-55	191	16.3
56-65	78	6.6
Over 65	28	2.4
Total	1174	100
Income		
Under -20,000	98	9.6
20,001-30,000	96	9.4
30,001-40,000	127	12.5
40,001-50,000	110	10.8
50,001-70,000	215	21.1
70,001-100,000	189	18.6
Over 100,000	182	17.9
Total	1279	100
Marital Status		
Single	295	25
Married	745	63
Divorced	71	6
Committed	71	6
Total	1182	100

Variables	Frequency	Per cent
Media Preference		
TV	438	40
Magazines	353	32
Radio	48	6
News Paper	218	20
Internet	20	2
Total	1077	100
Country of Residence		
USA	927	79
U.K.	133	11
Canada	48	4
Other	64	6
Total	1172	100

The data gathered from the tourists were analysed using the multivariate technique of logistic regression. This technique was chosen because it has the ability to predict the outcome of a dichotomous dependent variable given a number of independent variables. In this case, we want to predict the chance of a tourist taking a land-based vacation or a cruise vacation based on their demographic profiles as outlined above. Further, this technique is suitable for the analysis in this paper because the error term does not have to adhere to the normality assumption, thus the results received can still be robust (Pindyck and Rubinfeld, 1998). Also, the model was chosen over the probit model for, in essence, it is easier to calculate and, moreover, the results do not differ (Gujarati, 2003).

The results from this analysis are presented below.

RESULTS

The results from the logit model have revealed some interesting insights into the demographic factors that motivate the decision to take a cruise-based versus a land-based vacation. When all the variables were entered into the model, the analysis revealed that age, gender and income were the only factors that impacted the decision making process regarding vacation choice.

Table 2 below highlights these results.

Table 2: Logit model with all explanatory variables

Variable	Beta	SE	p-value
Age	.628	.080	.000*
Gender	-.465	.181	.010*
Marital Status	-.069	.125	.581
Country of Residence	.014	.020	.497
Income	-.151	.052	.003*
Media Preference	-.026	.088	.770
Constant	-1.373	.530	.010
R2 Nagelkere	.14		
X^2	3.9 (.86)		
Hosmer and Lemeshow			
-2LL initial model	78		
-2LL final model	780		

*p < .05

Further, to ensure that the model coefficients are stable and the results are robust, the significant variables from the full model were used to run a reduced form model. The results from this analysis revealed that the coefficients are indeed stable and robust.

Table 3 below shows these results.

Table 3: Model in reduced form

Variable	Beta	SE	p-value
Age	.581	.072	.000*
Gender	-.466	.166	.005*
Income	-.174	.047	.000*
Constant	-1.172	.072	.002
R^2 Nagelkere	.13		
X^2	7.6 (.47)		
Hosmer and Lemeshow			
-2LL initial model	1011		
-2LL final model	931		

*p < .05

Another measure of the strength of the model in predicting demographic factors that impact decision making on vacation choice is the predictive accuracy. This statistic helps us to better understand how well the model predicts group membership. In this case, it will predict what factors are associated with cruise-based versus land-based vacations. Tables 4a and 4b show the predictive accuracy for both models. Indeed, the results show that both models have a fairly high predictive accuracy and the level of accuracy is almost similar in both cases.

Table 4a: Predictive accuracy of full model

Observed		Predicted Vacation Choice land	Predicted Vacation Choice cruise	Percentage Correct
Vacation Choice	land	638	14	97.9
	cruise	157	26	14.2
Overall Percentage				79.5

Table 4b: Predictive accuracy of reduced form model

Observed		Predicted Vacation Choice land	Predicted Vacation Choice cruise	Percentage Correct
Vacation Choice	land	671	18	97.4
	cruise	191	31	14.0
Overall Percentage				77.1

All other diagnostic statistics appear to suggest that the results from this analysis are robust. The Hosmer and Lemenshow statistic (measuring the correspondence of the actual and predicted value of the dependent variable) was non-significant, an indicator of a good model fit. The improvements in the -2LL for both models also show that the model has a good fit. Further, the R^2, which is similar in interpretation to R^2 in the multiple regression also show a good model fit. These R^2 values are in line with and in some cases better than values reported in the extant literature. More detailed discussion on these results will be done in the section below.

DISCUSSION

The results suggest that age, gender and income are factors that impact on the decision making process regarding tourist vacation choice. The fact that these variables emerged as the most significant in the model suggests that they are most important in predicting whether or not a tourist will choose a cruise-based vacation over a land-based vacation.

The model suggests that older tourists would want to choose a cruise-based vacation in comparison to the land-based option. This finding resonates with that of previous work in the existing literature. For example, Quiroga (1990) suggests that older visitors are more likely to take vacation where there are guided tours. The cruise experience is similar to a guided tour in that passengers are in the safe 'bubble'[1] of a ship and when they visit a port, their activities are guided until they return to the ship. As tourists age, they want to have less stress on their vacation. Therefore, vacations that have guided tours that help tourists have a good time without having to organize it themselves will no doubt be more attractive to older visitors.

As it relates to gender, the model appears to suggest that females are more likely to take cruise-based over land-based vacations. Again, based on existing literature, this result seems to make sense. The literature posits that females will normally travel on package tours while men would normally travel for sports or more demanding activities (Hall, 1994). The cruise-based vacation normally offers more package tours than the land-based vacation. Further, because of the nature of the cruise vacation, less stress and adventure are associated with it and more chance for relaxation. The literature found that the need for relaxation is also critical for women on their vacation (Pennington-Gray & Kerstetter, 2001). Males, on the other hand, are more interested in adventure and so a land-based vacation lends itself to such activities.

As it relates to incomes, the results suggest that as income increases, tourists are more likely to choose the land-based vacation over the cruise-based vacation. This does not seem surprising as land-based vacations seem to be more expensive than the cruise-based option. This may explain why players in the land-based sector complain that the cruise sector advertising tends to depict it (land-based) as inferior. Land-based vacations also offer more adventure and attractions, so with higher incomes tourists can afford to enjoy multiple attractions while on a vacation. Being confined to a cruise ship may not offer these alternatives and as such, tourists with higher incomes who want to do things like shopping, who want to take part in physical activities, attend festivals, etc. will not be attracted to the cruise ship type of vacation.

It must be noted that although other factors were not found to be significant in this study, they should not be disregarded in any further analysis. This analysis took a positivist approach to analysing how demographic factors influence the decision to take cruise-based versus land-based vacation. However, as the theoretical framework of decision theory shows, not all decisions are made based on the assumption of rationality, but subjective factors play a role in decision making as well. In this case, factors such as media preference can influence decision making for tourists but are not picked up in a positivist model of this nature. Tourists may see an advertisement on a television or in a magazine – and that influences their decision to take a particular type of vacation. This can only be picked up through some form of qualitative inquiry.

CONCLUSION

This research has shown that age, gender and income are strong predictors of whether or not tourists take a cruise-based vacation versus a land-based vacation. Before now, very little work was done on this important area in the vacation and travel decision making process. With the increase in cruise travel, this information is important especially for persons involved in marketing of vacation choice. The variables identified in this study will provide them with a profile of the type of tourists that are more likely to choose a particular vacation (i.e. land or cruise). Therefore, marketers will be better able to segment their marketing campaign to target different groups of tourists. This will ensure that the advertising dollar is used as efficiently as possible and money is not used to target the wrong group of tourists for a particular type of vacation.

The study also has implications for future research on the subject. Future researchers can use focus groups with land-based visitors (as this will be hard to do with cruise visitors) to get more in-depth information on how the decision is made to take this type of vacation over cruise. This information will not only enrich the current travel and vacation literature, but it will also provide an invaluable source for marketers so that they can develop better marketing programmes to attract a particular type of tourist. Further, other theoretical lens from disciplines such as psychology, sociology or anthropology can be used to shed light on this issue. Finally, the results from this study should be treated with some caution as the true population from which the data were gathered is not known.

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NOTE

1. The concept of the tourist bubble is discussed in Jaakson (2004).

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McDonaldization, Mass Customization and Customization

An Analysis of Jamaica's All-Inclusive Hotel Sector

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All-inclusive hotels have been a part of Jamaica's tourism landscape for almost three decades and currently dominate Jamaica's hospitality product. The all-inclusive phenomena has however received virtually no academic analysis. This lack of analysis means that there is no understanding of why all-inclusives have grown so phenomenally. It also makes it difficult to understand weaknesses, strengths and the future of the all-inclusive sector. As a way of understanding this phenomenon better, a conceptual analysis of Jamaica's all-inclusive hotels was undertaken using material derived from documented sources and interviews of executives of all-inclusive hotels. The article begins by tracing the evolution of Jamaica's all-inclusive hotels and continues with an analysis of these hotels using three conceptual models – McDonaldization, mass customization and customization. The article highlights the contributions and limitations of each model for the individual hotels and for Jamaica. It determines that while there is room for all three models, each hotel must carefully define its product and clearly distinguish it from other models in the market so as not to confuse travellers and dilute the product.

KEY WORDS:

all-inclusive hotels

McDonaldization

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customization

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INTRODUCTION

The all-inclusive concept allows guests to pay for their holiday in advance and usually in the country of origin. It includes all accommodation, food, drink, entertainment, sports facilities, tips, tours and airport transfers (EIU, 1993: 40 as cited in Chambers & Airey, 2001). The term all-inclusive refers to more than a package however, and the all-inclusive philosophy is described as one that "espouses no surprises (unless surprise is part of the program), especially unexpected costs. It promises consistency and quality –

good beverages and fare, safe and comfortable accommodations, caring staff, and plenty of accessible activities" (Paris & Zona-Paris, 1999: ix). It is a model that dominates the Jamaican landscape and in fact Jamaica is often described as an all-inclusive destination because of its many all-inclusives and its adoption and perfection of the all-inclusive model that dominates the regional tourist industry (Issa & Jayawardena, 2003). With more than 50 per cent of Jamaica's hotel rooms being all-inclusive, and with thousands more all-inclusive rooms slated to come on board within the next five years, the all-inclusive concept is clearly not only an important one, but one that is likely to form a significant part of the industry for many years in the future.

Despite the importance of all-inclusives and their increasing dominance of the accommodation sector, there is very little academic research on how they operate, their strengths or their weaknesses. The research that does exist focuses primarily on the history of all-inclusives (Issa & Jayawardena, 2003), the impact of the all-inclusives on the overall economy (Chambers & Airey, 2001; Patullo, 1996), the prospects for the future (Turner & Troiano, 1987; Poon, 1993; Horner & Swarbrooke, 2003), or on the level of satisfaction (Deslandes, 2007). Moreover, there is virtually no academic research that helps us to understand the distinctions between different types of all-inclusives and the different ways in which they contribute to the destination. This paper seeks to fill these gaps.

Jamaica's all-inclusive product was born out of necessity in the 1970s when the country was a difficult destination to market overseas because of its political direction and the perception of social instability. The first all-inclusive cleverly overcame this problem by launching the hotel and its concept in Canada without mentioning the location of the hotel. The launch used what were at the time very risqué billboards and brochures to introduce the idea of sheer hedonistic pleasure in the tropics. Interested persons were invited to contact their travel agents for details. The novelty of the concept and the convenience of the package not only attracted thousands of visitors who might not otherwise have braved Jamaica, but it spawned numerous competitors. While the two giants of the Jamaican all-inclusive sector have been the Sandals and Superclubs chains, numerous other hotels have either adopted and adapted the all-inclusive model in its entirety, or have added it to their existing rooms only model. More recently, a number of very large Spanish hotel chains have established a presence on the island offering their own brand of the all-inclusive model.

As the all-inclusive concept completes its third decade in Jamaica, it is not surprising that all-inclusives in a crowded marketplace have tried to distinguish themselves from one another by using terms such as 'the super-inclusive' and the 'ultra all-inclusive'. Indeed these changes are to be expected in a highly competitive marketplace where there is an attempt to differentiate based on different features including service amenities and market segment.

This variety in all-inclusives provides consumers with numerous choices and may increase the overall demand for hotel rooms in the destination. On the other hand, there is the concern that many of the newer all-inclusives are cheapening the image of the destination and diluting the all-inclusive concept. This concern has been expressed most recently with the influx of the Spanish mega-hotels which easily dwarf the smaller local hotels and chains that have dominated for three decades. There are for example concerns that these hotels will create too many rooms for the island and lower room rates (*Jamaica Gleaner* Online, February 20, 2000, September 27, 2005) and lower the quality of service (Edwards, 2007). The question is whether there is really a danger to be feared from these new all-inclusives or whether they simply reflect the further and arguably natural evolution of the product. This is a question that can only be answered by a deeper analysis of the all-inclusive concept. This paper focuses on understanding the differences in the types of all-inclusives. We also highlight the strengths and weaknesses of the current models and make recommendations for policy makers and hoteliers. This is achieved by tracing the evolution of the all-inclusive concept, highlighting major changes and milestones along the way and analysing the contribution of all-inclusive types to the destination.

The paper continues with a brief explanation of the methodology used to conduct the study. In the next section we discuss the history of the all-inclusive sector in Jamaica. In section three we present an overview of three models that will be used to explain the evolution of the all-inclusive hotel sector. We argue that the Jamaican all-inclusive product includes hotels that are designed along the lines of McDonaldization – that is based on efficiency, calculabilty, predictability and control. These characteristics allow these hotels to provide guests with a product that is considered by them to be good value for money while allowing the hotel to operate in an efficient and cost effective manner. A second model is based on the principles of mass customization – a model that embraces some of the principles of McDonaldization such as efficiency and control while simultaneously providing consumers with more choice and flexibility than would be available in the straight McDonaldized model. We will argue that there is a third model emerging – a model of all-inclusive that offers full customization to its visitors. In the fourth section of the paper we analyse the implications of the various models for the sustainability of the sector and make recommendations for hotel managers and tourism policy makers. These recommendations are also extended to the European plan or EP hotel (room only) sector of the market which is itself struggling to compete with all-inclusives. The paper concludes with areas for future research.

METHODOLOGY

We reviewed the available academic literature on all-inclusives as well as the popular literature on this growing phenomenon. We viewed the websites of the Jamaica Tourist Board and the websites of Jamaica's all-inclusive hotels. We also conducted interviews with senior executives of all-inclusive hotels who had been involved in Jamaica's hotel industry for a combined total of more than 100 years. More importantly they had all been involved in the all-inclusive sector during its formative stages and represented the major chains in Jamaica's all-inclusive market.

THE ALL-INCLUSIVE

The term all-inclusive hotel is used to describe a hotel where virtually everything related to the holiday is included in one pre-paid price and all the amenities and facilities needed for the vacation are provided on site. Jamaica's first all-inclusive started under the leadership of hotelier John Issa in the then relatively undeveloped western town of Negril. It was closely modeled off the Club Med concept. and provided guests with a conveniently packaged cash free vacation (Issa & Jayawardena, 2003). It differed from traditional hotels in that it sold single beds as opposed to rooms. The price also included meals, sports and entertainment in the package price. Drinks and cigarettes were excluded but payment for these items could be made using the hotel's cash substitute of beads.

The hotel was an immediate success and after the initial marketing effort was sold primarily by word of mouth. Issa's second attempt along these lines was geared towards the couples market rather than singles and the hotel appropriately named Couples built upon the Negril Beach Village concept but with modifications. The major modification being the elimination of the cash substitute and the inclusion of all meals, drinks and cigarettes. This idea was also successful and lead to several more hotels run by the Issa family. The successful concept also attracted attention and lead to the emergence of his biggest competitor – the Sandals chain run by entrepreneur Gordon 'Butch' Stewart.

Throughout the 1980s Stewart and the Issa family battled for market share in Jamaica. In the 1990's they continued to expand by moving their concepts offshore to other islands in the Caribbean and to South America. The all-inclusive concept was so successful that many EP hotels were forced to adopt the all-inclusive model in order to remain competitive. Others remained as EP hotels but offered an all-inclusive package as an option to guests. The increased supply of all-inclusive hotel rooms of all types in the market lead to some confusion about what to expect from an all-inclusive package.

To try to limit the confusion in the all-inclusive concept, the then market leaders of Sandals and Superclubs began to differentiate themselves as the 'Ultra all-inclusive' and the 'Super-inclusive' respectively, and to distinguish themselves from other brands by detailing what visitors could expect. They also began to enhance their products and services in different ways including increasing the number of dining options available and adding spas and improved entertainment. During this period the market also became even more differentiated as the market leaders focused on narrower market segments. This hectic period of expansion saw the birth of brands such as Grand Lido, Breezes, Beaches, FDR resorts and Sunset – all Jamaican owned and managed brands. The segmentation was based not only on the traditional elements of income and taste but catered to the psychographics of travelers by considering how travelers think, feel and behave (Travel & Tourism Analyst, 1993).

These innovations have allowed the industry to remain at the maturity stage for several years and while there have been exits from the market, there are many more entrants. Despite numerous predictions that visitors will tire of the concept, there is no clear indication that the sector is about to enter into a decline. To the contrary, the sector is growing rapidly because of aggressive investment on the part of a number of Spanish chains that are expected to build thirteen new hotels in Jamaica by 2015.

While there has been some analysis of the all-inclusive phenomena, most of this analysis focuses on the economic viability or the implications for communities and destinations (see for example Poon, 1993; CTO, 1994). In the following section we move beyond this analysis to examine different categories of all-inclusives based on three models of operation - McDonaldization, Mass Customization and Personalization.

MODELS OF ALL-INCLUSIVE OPERATIONS

McDonaldization

The term 'McDonaldization' was utilized by Ritzer (1996) to describe the increasing rationalization and predictability applied to organizational life. Ritzer argues that McDonaldization has become widespread because of its appeal to corporations and consumers and offers both groups efficiency, calculability, predictability and control. We argue that from the onset all-inclusives were based on an attempt to rationalize the holiday experience and to make it more efficient for host and guest. According to Issa and Jaywardena (2003), the first all-inclusive was based on two concepts – Club Med and cruise shipping which were at the time both hugely successful. They had in common the ability to deal large numbers efficiently and predictably and to offer value for money and convenience. As we continue to discuss below, this bundle of benefits is the foundation of many of Jamaica's all-inclusive hotels.

Poon (1989) points out that all inclusives' control over as many elements of the vacation experience as possible, has resulted in increased control for the hotel and increased confidence on the part of tour operators who know that there is this level of control. The model of the cruise ship which fits neatly into Goffman's description of a 'total institution' (Goffman, 1961) with its life cycles and schedules and control wielded solely by the Captain and crew has been well adhered to by all-inclusives. For example unlike an EP hotel where visitors can come in to consume a drink or a meal, everyone other than staff who comes to an all-inclusive must either be staying there or have purchased a pass. Since staff are carefully screened before hiring then the influences of the outside world are very limited. While guests are free to leave the property at any time, they are lured to stay because they have already prepaid for all meals. Consequently, the guest experience is well controlled since, as Paris and Zona-Paris (1999) point out, there are 'no surprises'. Guests are therefore protected from any form of disturbance or harassment and are in what Caprioni (1992) has referred to as the increasing popular 'let's pretend world'. This world, she argues, is one in which crime does not exist; beggars are banned and the native workers are always friendly. It is a perfect simulation of the outside world and it is not coincidence that for a time one of Issa's hotels was named Jamaica Jamaica indicating that one could experience Jamaica within its confines. The Superclubs managed Braco all-inclusive hotel went even further by replicating an entire Jamaican village including a sports field and authentic looking rum bar on its property.

All-inclusives also offer control when it comes to financial control since in the cashless world of all-inclusives there are many fewer opportunities for collusion or fraud. All-inclusives also reduce the need for service personnel such as cashiers. Furthermore, since everything is already paid for it is quite feasible to give guests ready access to seemingly endless supplies of hot and cold beverages. Employees are only needed to restock these areas from time to time. All-inclusives in fact moved very early on to the concept of self-service promoted under the guise of ready availability and that tenet of McDonaldization – quantity.

Quantity is a key aspect of Ritzer's second tenet of McDonaldization – calculability. Ritzer argues that McDonalds emphasizes the number of burgers sold and the extent of its empire and companies based on McDonaldization also focus on the quantity that one can get. In the early days of the all-inclusives the emphasis was on the fact that a guest could eat and drink as much as he or she wanted without having to pay more. Over the years the boast of quantity has expanded to include the number of restaurants, the variety of watersports, the entertainment available and even the personalized services of a nanny in the case of FDR resorts. The Riu chain for example emphasizes not only the number of restaurants and bars but the promise of 24 hour a day all-inclusive service. Sandals by offering full exchange privileges at its other resorts, also emphasizes its magnitude and the benefits to be gained from choosing it rather than a competitor. Words like 'Super' and 'Ultra' inserted before the term all-inclusive are designed to have the same effect of 'more, more, more'.

At the same time quantity may not always be an indicator of quality and Ritzer argues that one does not go to McDonalds for a delicious meal but to refuel – efficiency being an obvious goal. Similarly every all-inclusive based on the lines of McDonaldization does not promise that the experience will be of the best quality but simply that there will be a lot to experience and that it will be delivered in an efficient and convenient manner. This efficiency is something that today's time stressed individuals are demanding and willing to pay for (Martin & Stubbs, 1999). Therefore many McDonaldized all-inclusives put limits on the type of liquor available offering in many cases only local brands. Similarly, there are limits on the use of facilities such as the 'gourmet' restaurants.

All-inclusives also demonstrate predictability – McDonaldization's third tenet. First, the no tipping rule means that guests do not have to worry about inferior service because they are not able to offer big tips and can predict that every guest is equal at least as far as their ability to reward service (Turner & Troiano, 1987). Visitors to an all-inclusive also know exactly what they will be getting and how much it will cost before they get there. Much of the confusion associated with foreign travel such as exchange rates and tipping customs is therefore eliminated. Because the price is all-inclusive and the property is enclosed guests can also anticipate that there will be no unpleasant surprises. When a guest books with a branded all-inclusive, the predictability level is increased because the product is already known. A visitor can therefore stay at Superclubs' hotels anywhere in the world and be assured that while they may look different, the service and the style will be the same. Both Superclubs and Sandals have gone even further in the promise of predictability by both offering service guarantees and hurricane guarantees.

Finally, all-inclusives are efficient, fulfilling McDonaldization's fourth tenet. Guests pay once for all that they consume and do not need to think about money again. Convenient features such as airport check-in from the hotel or on-line hotel check-in before leaving home are designed to add value. Even weddings are efficient in an all-inclusive. Sandals promises not only a 'free wedding' (with your honeymoon), but a carefree wedding package that includes the preparation of documentation, a personal wedding consultant, a wedding cake and a picturesque wedding location, among other amenities. The Sandals website even offers links to other websites where the prospective bride and groom may choose wedding dresses or photography packages. Deluxe weddings with designer cakes and flowers are also available.

All-inclusives are also efficient from the perspective of the hotel. One of the biggest sources of efficiency comes from the ability to predict with certainty how many guests will consume the hotel's food, beverage and entertainment. Other efficiencies come about through the use of buffets and self-service dispensors as well as strict reservation requirements for specialty restaurants, tennis courts and so on. Managers are therefore able to schedule staff and make purchases more efficiently. Other sources of uncertainty such as the level of service are reduced because all staff may be trained to treat all guests in the same way since the tipping system is no longer there to encourage disparities in behaviour. Because all-inclusive guests are somewhat of a captive audience, the hotel has the ability to gently manage their behaviour by encouraging them to consume certain beverages, foods and sports and to take less of others. Buffets, self-service facilities, booking schedules for gourmet restaurants and the timing of entertainment are all ways in which guests may be urged to behave in a particular way that fits the hotel's need for efficiency.

The McDonaldization concept is an ideal fit with all-inclusives. It allows them to serve large numbers of guests quickly, efficiently and in a way that leads to satisfaction. While it may explain the immediate success of all-inclusives it may also explain some of the movement away from this particular model of it. As Ritzer argues, there is an anti-McDonaldization movement fuelled by people who do not want a standardized and homogenized package. Donkin (as cited in Taylor and Lyon, 1995) points out that customers had become inured and perhaps a bit jaded at the concept of speed as an aspect of service. He says in part, "They wanted warmth, helpfulness, time to think, friendliness and advice…. We had failed to see… that our customers were now veterans in the quick service market and their expectations had gone through the roof. What was revolutionary in the seventies was ghastly in the caring nineties." The all-inclusive hotel therefore may suffer the loss of this segment of the market. As the examples given under the efficiency discussion indicate however, some all-inclusives are fighting this tendency by offering guests the option to 'biggie size' or upgrade their order. Other hotels have moved away from the McDonaldized market entirely or have created a separate brand to deal with it. We examine the latter in the discussion on mass customization.

MASS CUSTOMIZATION

Mass customization means efficiently serving customers uniquely. It meets the needs for low cost and customization (Pine and Gilmore, 1999). While McDonaldization offers the consumer some variety from which to choose, mass customization greatly increases the options available by allowing consumers to indulge their preferences for colour, fabric, style and so on. Moreover while McDonaldization focuses on quantity, Cox & Alm (1999) argue that mass customization is not just about producing *more* stuff, but is about producing the *right* stuff (our italics).

Companies offering mass customized services and products typically operate on two levels – the standard offering available to everyone and the enhanced customized offering for those who are willing to pay a bit extra to have their exact specifications met. The term 'mass' is not meant to suggest a diminishing of quality but merely the ability to have mass appeal while simultaneously providing unique and customized products and services. Nor is it meant to suggest merely a huge number of options because as Pine and Gilmore point out, customers are likely to be overwhelmed by too much choice. They argue that customers do not necessarily want choice – they just want exactly what they want. The move towards mass customization is a response to competition according to Taylor and Lyon (1995) who use the case of Burger King that changed the rules of the game because it could not compete directly with McDonalds. It is also an opportunity to attract more customers by offering extra value (Cox & Alm, 1999).

Superclubs is an example of an all-inclusive brand that has responded to this desire for more customization by offering three distinct levels of all-inclusive – the Starfish brand, the Grand Lido brand and the Breezes brand. The Starfish brand caters to families on a budget and offers a basic all-inclusive package that may be upgraded to the 'platinum package' that offers more dining and drink privileges. The Breezes brand offers more choices including international dining and premium drinks, while the Grand Lido offers what is termed as 'ultra luxurious' accommodations and round the clock service as well as even more choices in food and beverage. Superclubs is therefore attempting to get the best of both worlds by meeting the needs of different segments of the market. This is in keeping with what Taylor and Lyon see as a tenet of mass customization – "developing, producing, marketing and delivering affordable goods and services with enough variety and customization that nearly everyone finds exactly what they want" (Taylor and Lyon, 1995: 67). Sandals on the other hand has gone a slightly different route by offering the 'ultra all-inclusive' and an upgrade to that package.

The 'ultra all-inclusive' includes an impressive array of premium liquors, gourmet dining, snacks at anytime, sports and entertainment. The standardized Sandals package may however not fit the needs of some guests and these guests are allowed to customize their package. Wedding packages are therefore 'free' or at least included in the rate for couples, but some couples may wish to enhance their wedding and they may therefore select from other options. While the options offer greater choice, the choices are not limitless and for the sake of convenience they are neatly packaged with impressive sounding names such as 'The Floral Elegance' and the 'Seascape Collection'.

These packages are coordinated by the aptly named wedding coordinators who while very flexible and adaptive, mostly coordinate the packages that have already been designed. Like any good mass customization business, Sandals and other wedding specialists have done their homework and have packaged those elements that are most likely to be demanded by guests. This allows the hotel to offer choice but to do it an efficient and somewhat controlled way. Guests who wish further customization may go to a different level of options and select from 'Wedding package Optional items' or may make it even more special by opting for a private candlelight dinner or butler service.

One of the hallmarks of mass customization is the efficiency with which large numbers are handled. This necessarily means putting some limits on the extent to which the guest may customize since too many choices and combinations may eventually lead to inefficient responses. Therefore for example Sandals' butlers – available in the highest level of suites, are highly trained to anticipate and cater to the guest's every need according to its website. However, it is not strictly true that the butler will do any and everything for you. Indeed the same website delineates his duties and even limits the number of items that he will press as part of the package.

These limits allow the hotels to offer guests a 'customized experience' while at the same time not losing the benefits of economies of scale and efficiency. In the same way that you may only choose the colour and fabric options offered by your car dealer, you may only choose from among the options offered by the hotel. Setting these limits makes it possible to offer the goods and services at a price that is still affordable to many people. Without these limits a guest might conceivably have the butler iron an entire wardrobe or have him fetching and carrying for the entire day. Setting limits allows a number of guests to have their 'very own butler' who attends to their unique preferences. Mass customization has therefore increased the appeal of all-inclusives to a segment of visitors who might otherwise have considered all-inclusives to be too McDonaldized for their tastes. It may also have extended the growth period and staved off the onset of maturity. Mass customization appears to be gaining popularity, especially in the area of spa treatments where guests may pick and choose from a menu of choices. Some all-inclusives have gone even further with the Royal Plantation offering a 'pillow menu' from which guests may choose.

CUSTOMIZATION

While mass customization may be described as efficiently serving customers uniquely, customization is simply serving them uniquely. Prahalad & Ramaswamy (2004) describe it as the process of co-creation – an experience environment within which individual consumers can create their own unique personalized experience. The firm or in this case, the hotel is no longer the decision maker but rather the entity with which the customer interacts to create what he or she considers to be a valuable experience.

While all-inclusives based on the concepts of mass customization and McDonaldization account for the majority of the market there is still a segment of the market that is likely to be unattracted to them. This segment is the very high end of the market that is not interested in efficiency and calculability and wants more customization than is offered in a mass customized all-inclusive. All-inclusives are beginning to tap into this luxury market by offering them the benefits of all-inclusiveness but in what may be considered to be an exclusive setting. Both Sandals and Superclubs for example, offer villas that come complete with their own staff which includes personal Chef, butler, gardeners, housekeepers and beach attendants. Unlike the butler and the concierge services offered in mass customization guests may ask for what they wish – not choose from a greater menu of choices. Sandals' luxury boutique hotel – The 74 suite Royal Planation is a member of the leading small hotels of the world and offers a 'Royal Plan' for visitors who according to the website are desirous of the ultimate worry-free vacation. Personalization also caters to the desire for privacy – the desire of today's moneyed travelers according to Underhill (2006) who argues that while sheer numbers of people will continue to drive the low cost segment of the travel market, there is an increased demand for people who want privacy. The luxury market is also growing and has been shown to be resilient even after economic shocks (Sherman, 2007).

It is therefore not surprising that Sandals is focusing intensely on this market and has plans to develop a category of suites with private plunge pools and exclusive dining experiences. The goal according to owner Butch Stewart is to move away from the often maligned all-inclusive connotation. Stewart has coined the term 'luxury included' vacation apparently in an attempt to further distinguish this type of offering from other types of all-inclusive options (Hotel, 2007).

Customized service is by nature tailored service that consumes more employee time and effort than any other approach to service. Employees engaged in this type of service display a strong customer orientation, high interaction involvement, spontaneous and detailed information sharing and social support (Ford, 1998). They minister to people's physical needs but almost as importantly to their emotional needs. In describing this segment of the market Sherman (2007) makes the point that catering to these guests involves behaving like an 'idealized mother' – nurturing, noting individual preferences and quirks, anticipating and showering the guests with genuine care and unlimited labour.

Guests are promised exclusiveness and specialized attention by a staff whose sole purpose is to please them. In these types of luxury hotels the focus is on caring for guests as well as catering to them. The service is further defined by extensive personalization, needs anticipation, a willingness to break rules and unlimited physical labour performed by deferential sincere workers. As this definition suggests there are virtually no limits on what a guest may ask for and receive (Sherman, 2007). In this type of all-inclusive the focus is on offering what Crick (2001) has described as full personalized service – service in which the servers engage in extensive customized emotional labour designed to make the guest feel valued and special, as well as significant customization to meet expressed and unexpressed needs. It is therefore quite different from other types of all-inclusive where emotional labour is usually present but customization is limited. It also differs in that there is a much lower level of efficiency. In this case the goal is to surround the guest with abundance – not of products however, but abundance of servers ready to pamper and care.

In this section we have examined how all-inclusives started and traced their evolution through the differentiation stage of mass customization to the continued differentiation of personalization. The fact that these models all co-exist suggests that they are all meeting a particular need. In the next section we compare them and analyse their implications for the market.

IMPLICATIONS AND AREAS FOR FURTHER RESEARCH

The all-inclusives described vary significantly in what they offer to the customer. Table 1 indicates a continuum of all-inclusives. McDonaldized hotels offer guests value for money, convenience and security. Guests who stay at them know ahead of time what their

	McDonaldization	Mass Customization	Customization
Room Rate	$ – Value priced	$$ – Medium priced	$$$ – Expensive
Type of service	Restricted by regulations about what can be consumed and when it can be consumed	More flexibility and higher service levels	Extremely high levels of service
Role of staff	To supply and replenish	Supply, replenish and provide some customization	Cater to and pamper
Rationale for selection by customers	Based on the consumption	Based on the price paid	Preference for quality over quantity

Table 1: Comparison of all-inclusive types

vacation will cost them and accept the limitations in exchange for the relatively low cost. They have great appeal to a segment of the market but have to compete on the basis of lower prices since they lack the variety and amenities of the other types of all-inclusives. There are however at least three groups in this category and they have different capacities to survive. The large Spanish hotels have been extremely successful in this segment of the market as they can depend on backwards and forwards integration, economies of scale and models that have been tested and approved in other markets. The second group which includes local brands such as Breezes and Sunset are also successful because of their attachment to a group. This attachment also provides them with economies of scale as well as marketing power.

The third and most at risk group includes local independent all-inclusive hotels that were formerly EP brands but have adopted the all-inclusive brand as a way of surviving. They are trapped in a vicious cycle because they compete primarily on price and therefore operate on relatively low margins. As a result they are unable to offer enhanced services or to upgrade the physical plant. This means that they must continue to charge lower costs because guests would be unwilling to pay more for the current offering. These hotels are also the most vulnerable to competition because they do not offer a clearly differentiated product and are unbranded.

Hotels that offer mass customization appeal to more than the basic needs of economic value, security and safety. They have enhanced their product by providing guests with the feeling of abundance and a feeling of being part of a unique group. Guests who are promised access to premium liquors, gourmet dining and numerous sporting and entertainment activities are usually willing to pay more for this privilege. Mass customized hotels also appeal to their other senses by providing 'discerning guests' with the option to go one notch higher to purchase a product that is even better than the one that others are getting. While there are restrictions in this enhanced product, it still allows the guest the feeling of being special and unique.

Mass customized products and services allow the hotels to have the best of both worlds – efficiency and predictability even while offering customization. They allow guests the feeling of being special and unique without having to pay too much extra for the privilege and even those guests who do not pay extra still enjoy good products and services. Mass customized hotels are likely to continue to be successful as long as they continue to innovate and reinvent themselves. If packages appear too canned or too limiting, guests may not consider them worthwhile. Furthermore, hotels must depend on much more than the product. An important part of mass customization is the feeling of being special and unique. In the same way that a car purchaser wants the feeling of being special as he drives the car that has his colours, fabrics and accessories, the hotel guest wants to feel unique as he shares his 'romantic dinner' with his significant other. While there may be a dozen other guests enjoying similar romantic packages it is the job of the service staff to make each couple feel unique. The products and services must also offer enough variety that guests do not feel constrained or limited. For example a guest who may custom make a menu from nine entrée items is less likely to ask for something different because psychologically he feels satisfied. If confronted with three entrée items however he is likely to have a different response. Hotels must also ensure that the choices are in keeping with what guests want and are likely to value.

Customized all-inclusives are just emerging but have been tapped by at least one brand as the way of the future. The extremely high costs associated with offering these customized services means that most hotels will be unable to enter this segment and it will be kept small which is ideal for this type of product. The customized all-inclusives are however quite vulnerable to economic downturns in source markets and face limited options since heavy discounts would be detrimental to the brand.

Do these models have any implications for the operations of EP hotels? The overwhelming success of all-inclusive hotels would suggest that there are some lessons to be learned. The first is evolution of products and services. As we have indicated the all-inclusive product has gone through several changes as it has sought to remain relevant to the market. EP hotels could learn to spot the approach of maturity and to stave it off through tapping a different niche market or through product enhancement. This would be significantly better than the traditional EP approach of trying to maintain market share by price cutting. EP hotels might also seek to harness the benefits of McDonaldization and mass customization. Both offer guests different types of value. While all-inclusive hotels have tended to move deliberately from one to another, or to segment the market and offer the different products and services, EP hotels often desperately try to be all things to all men. The result is that they fail to effectively meet the needs of any segment. While McDonaldized products and services may be scoffed at by many, they are immensely popular with a large section of the market and there are benefits to be gained by meeting the needs of this market. McDonaldization does not however sit comfortably alongside customization so EP hotel managers must choose or segment if they are to be successful.

The customization model is a relatively new one in all-inclusives as indicated by the few hotels that offer it. Unlike the other two models the customization model does not appear to be tied to the all-inclusive concept. Rather, it is a stand alone concept that just happens to take place under the all-inclusive umbrella. It is therefore not a coincidence that this model is found within the branded chain hotels. It may well be that a guest chooses the Sandals or a Superclubs brand because of their reputation and then seeks to have the need for customized and luxury service met. It cannot obviously become a popular model because that would defeat the purpose of the guest who seeks this experience. It is however a useful model for hotels that already have a well established identity and wish to leverage it. Hotels that offer this level of service must however resist the temptation to slip in tenets of McDonaldization or mass customization as these will ruin the effort. This model works because of the high levels of visible and invisible labour extended and because of the willingness to bend and break rules to facilitate the guest (Sherman, 2007). All-inclusives offering this level of service must therefore price it appropriately so that they are able to handle the often expensive and labour intensive demands of this segment of the market.

From the perspective of national policy makers the most beneficial in terms of income generated are the mass customized and customized hotels. They are more valuable because they enjoy higher occupancies throughout the year and may have higher levels of repeat business. On the other hand, it is these hotels that are most likely to have the highest level of imports to meet the demands of their more discerning guests. The local McDonaldized hotels charge less and are often on the margin because of the vicious cycle described earlier. They therefore are likely to be less profitable. It is unfortunately also the McDonaldized hotels that are likely to have the highest level of complaints. The newer Spanish chains are likely to have fewer complaints about product and service quality because they have a newer plant and a proven method of operation. On the other hand guest satisfaction may also be lower in these hotels – not necessarily because of poor product or service quality but because guests may expect a mass customized product and may be disappointed to find that they are getting less than this. The likelihood of this is increased in the current marketplace where guests may book directly rather than through an informed travel agent.

In this study we have examined the development of the all-inclusive concept in Jamaica focusing on its evolution through three different models. The study indicates that all models have a place but that standards and quality control are critical to maintaining their viability and sustainability. Future studies might expand to take a look at the all-inclusive product in other Caribbean destinations where the evolution might be different. For example, while security was and continues to be a major driving force behind all-inclusives in Jamaica, this is not the case in other destinations such as St. Lucia and Antigua. The Jamaican all-inclusive product is also largely owned and operated by Jamaicans but this is not the case in many other destinations and this variable may influence how they are organized and managed. It would also be important to do a full analysis of the different types of operations to find out the details of their strengths and weaknesses. Such an analysis would however require that hotels open their books to the scrutiny of researchers and previous experience has indicated that hotels are unwilling to be so transparent. It would also be very interesting to study the impact of the Spanish owned chains on the tourism product. They are still relatively new to Jamaica and it may be too early to judge. Indications are however that they are bringing a new dimension to the market as they economize on staff and go for the mass market (Edwards, 2007). Finally, future research should delve more deeply into the level of service extended by these different models. We have implied that the higher the selling price, the greater the level of service that is offered as while we do not know whether guests perceive this to be the case or whether there are areas of deficiency or unmet needs in the area of service we however see the growth of these brands over the past thirty years along with the number awards received as supporting our view.

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NOTE

For further information on the Ultra all-inclusive and the Super all-inclusive view the Sandals.com and Superclubs.com websites.

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Destination Choice and Levels of Satisfaction *with Jamaican All-Inclusive Hotels*

Trevor A. Smith

The study seeks to uncover the most important reasons for choosing Jamaica as a tourist destination; and to determine satisfaction factors and levels within Jamaican all-inclusive hotels. Factor analysis was used as the statistical technique for analysing interrelationships among the large number of satisfaction items and mean scores were generated for ranking destination choice reasons and satisfaction attributes. Additionally, the One-Way ANOVA was used to ascertain relationships among hotel ranking, visitor information and satisfaction factors. The findings indicated that the weather, beach front properties and friendly people were the top three reasons for choosing the destination. Friendly staff, ambience of beach front properties, service at bars and comfortable and relaxing environment were the most satisfying experiences; while exposure to culture and available activities for children were least satisfying. Six satisfaction factors were generated and results of the One-Way ANOVA revealed that hotel ranking and visitor information were related to satisfaction factors. Cultural exposure, service quality and value for money were the areas recommended for improvement in the all-inclusive package.

KEY WORDS:

destination choice

all-inclusive hotels

visitor satisfaction

Jamaica

INTRODUCTION

In a world threatened by crime, oil prices, terrorism, tsunamis and foot and mouth disease, world tourism continues to grow at a rate of four per cent per annum primarily due to real increases in disposable income and a desire for international travel (Yeoman et al., 2006). The Caribbean is a significant player in this arena with approximately five per cent of the global pie; with Jamaica receiving a mere nine per cent of tourists coming to the region. North America and the United Kingdom constitute the large majority (90 per cent) of stopover visitors to Jamaica. See Table 1.

Notwithstanding Jamaica's proportionately small share of the regional market, tourism continues to be the major foreign exchange earner for the national economy. Jamaica's position in Caribbean tourism is now poised for improvement and a number of targets have been presented in Tourism Master Plan (2002): to increase the sector's share of national GDP to 15% over 10 years; to increase stopover arrivals by 5.5% per annum; to increase visitor expenditure by 8.4% per annum; to increase room stock by 4% per annum; and to increase employment growth within the sector by 5.7% per annum (ESSJ, 2007).

Table1: Stopover visitors to Jamaica by country of origin

	2003	% share	2004	% share	2005	% share	2006	% share	2007	%
USA	968,315	71.7	996,131	70.4	1,058,317	71.6	1,190,721	71.0	1,132,532	66.6
Can	95,265	7.1	105,623	7.5	116,862	7.9	153,569	9.1	190,650	11.2
UK	147,393	10.9	161,606	11.2	149,773	10.1	175,363	10.4	185,657	10.9
Other	139,312	10	151,426	11	153,711	10	159,249	10	191,946	11
Total		100	1,414,786	100	1,478,663	100	1,678,902	100	1,700,785	100

Source: ESSJ (2007)

The Jamaican all-inclusive hotels are considered to be a major contributor to the tourism sector with an estimate of 50% of total tourism earnings. Tourism's success is therefore hinged on the successes of the all-inclusive hotels. This study will argue that success in this regard could be achieved through improved satisfaction of the all-inclusive customer base and satisfaction, in turn, could influence repeat business and possibilities for referrals.

Background to the all-inclusive hotel

The concept of the all-inclusive hotel has its genesis in Britain during the 1930s with the development of holiday camps. These all-inclusive type camps gained international prominence in the 1950s through the efforts of the French company – Club Med (Issa & Jayawardena, 2003). Holiday camps were seen as a safe haven for travellers and a means of escaping the 'hustle and bustle' of the hectic life.

Jamaica is considered as the vanguard within the region for the all-inclusive product and anecdotal evidence is suggesting that the concept was operated for the first time in 1962, the year of Jamaica's independence, by a hotel located in Port Antonio called Frenchman's Cove. Issa and Jayawardena (2003) have however argued that the all-inclusive hotel concept was started in Jamaica in 1976 by Hedonism II, then called Negril Beach Village, and was later followed by Couples in 1978 – both products of the SuperClubs group.

Study objectives

Caribbean academics have not begun to engage the subject of tourism development with the required level of seriousness and rigor despite the sector being the main source of revenue in the tourist dependent region (Boxill, 2004). This argument was advanced earlier by Harrison et al. (2003) who pointed to the paucity of research and lack of intellectual focus in the area of Caribbean Tourism.

Many Caribbean studies (Issa & Jayawardena, 2003; Jayawardena & Haywood, 2003; Oliver, 1992; and others) have provided very useful and practical recommendations for the development of Caribbean tourism. However, only a few have treated the subject with the level of empiricism that is required for management decision making. On this basis therefore, and on the basis that the all-inclusive hotels have become very critical to Jamaica's tourism; this study will attempt to provide a rigorous and empirical assessment of the levels of satisfaction with the Jamaican all-inclusive product and seeks to undertake this assessment highlighting the following objectives:

- To identify the main reasons for choosing Jamaica as a tourist destination
- To identify satisfaction drivers (items and factors) among all-inclusive hotel guests
- To determine significant differences among tourists on all-inclusive satisfaction factors
- To make recommendations for improving the all-inclusive product

LITERATURE REVIEW

Customer satisfaction

Customer satisfaction is a key outcome of the marketing activity and serves as a link to purchase, consumption and post-purchase phenomena (Churchill & Suprenant, 1982). Churchill and his colleague noted that "the need to translate the philosophical statement of the marketing concept into pragmatic operational guidelines has directed attention to the development and measurement of customer satisfaction" (p.491). Satisfaction is best operationalized as an algebraic expression of perceived quality and disconfirmation; where disconfirmation represents the extent to which performance fails to match prior expectations (Anderson & Sullivan, 1993).

There is no consensus on a definition of quality in terms of substance and determinants. However, the importance of quality to firms and consumers cannot be underestimated or ignored (Parasuraman et al., 1985). Additionally, there is growing evidence to suggest that customer satisfaction with service quality will influence post-behavioural intentions (Gould-Williams, 1999). These intensions are exemplified through attitudes to brand loyalty, repeat business and possibilities of referrals. In stark contradiction to satisfaction literature, Anderson and Sullivan (1993) found that prior expectations do not directly affect satisfaction.

Destination choice

The general image of the Caribbean in the minds of prospecting tourists is a picture of "an archipelago of sunny, tropical islands naturally decorated with exotic flora and fauna, surrounded by blue seawater and gentle breezes" (Jayawardena, 2002: 88). Over the last 50 years, the Caribbean has attracted large numbers of tourists and famous visitors including the likes of Ernest Hemingway, Ian Fleming, Errol Flyn and Harry Belafonte (Jayawardena & Haywood, 2003).

In selecting a destination, a number of reasons could be considered. These include scenic beauty, friendliness of local people, suitability of hotels and relaxing surroundings (Goodrich, 1977). Quality of accommodation and exposure to culture are also very important reasons (Stevens, 1992). Research is also suggesting that visitors who spend more days during trips were more likely to return than those vacationing less days (Kang & Tan, 2004). In a recent empirical study of Jamaica, 80% of tourists stated that leisure and holiday were the main reasons for their visit (Hawkes & Kwortnik, 2006).

Deslandes (2006), in his assessment of the effects that destination image, satisfaction and behavioural intentions of returning to the destination have on tourists visiting St. Lucia, concluded that mere satisfaction with the vacation experience may not be enough to influence behavioural intentions; and that satisfaction needs to be heightened to the ultimate level of delight to further influence destination choice. Leisen (2001) added that with high cost of tourism promotions, marketers are forced to target promotional campaign at markets that are most likely to choose a given destination.

Vacationing in the Caribbean

A study of tourist satisfaction of Barbados as a foreign destination found that restful and relaxing atmosphere and friendly people were the top rated items by tourists while cultural distance was least rated (Ibrahim & Gill, 2005). The Caribbean can be credited with both the best (Atlantis Hotel in the Paradise Island of the Bahamas) and worst (Le Meridien rain forest resort of Guyana) all-inclusive hotels in the world (Jayawardena & Haywood, 2003). All-inclusive packages are particularly popular because of "extensive buffets, refreshing pools, open bars and inviting beach chairs" (Hawkes & Kwortnik, 2006: 370). Friendliness and warmth of Caribbean people are also very material in this package (Crick, 2003; Ibrahim & Gill, 2005; Jayawardena & Haywood, 2003). Jamaica, for example, had 17% of the world's best and 35% of the Caribbean's best all-inclusive hotels in 2003 (Issa & Jayawardena, 2003). One of the reasons for Jamaica's success with all-inclusive hotels is the perceived need that the tourist has to be isolated from crime and violence (Ajagunna, 2006; Boxill, 2004). Consequently, guests who are desirous of venturing outside hotel properties in search of tourist attractions and shopping malls are usually afforded escorted trips with approved tour operators (Hawkes & Kwortnik, 2006). This level of inclusiveness is mitigating the prospects of "local artisans and other tourism spin-offs" (Ajagunna, 2006: 255). Another moot point is that, guests may not have exact information on what is included or excluded in the fixed price package which could create a level of uncertainty in the holiday experience (Ciftci et al., 2007).

Service quality and value

The family type all-inclusive hotels in Jamaica are considered to be attractively priced with a discounting on children – usually one free child per parent (Oliver, 1992). Turner and Troiano (1987) suggested that the all-inclusive concept is generally perceived by the tourist as better value for money than other accommodation options because of the intensity and variety of the vacation experience and the elimination of tipping. Elimination of tipping, they noted, has two advantages. First, "guests are not always facing an outstretched hand" (p. 27). Second, all guests will gain equal attention from employees in the absence of heavy tippers.

Much to the liking of the tourists, all-inclusive hotels have dramatically increased consumption of food and beverage (Ciftci et al., 2007). This study also notes that food and beverage are proving to be the highest cost inputs within the entire package and so hotels are now on a drive to reduce cost, unfortunately, at the expense of quality.

In a study of three Jamaican 5-star hotels with a sample of 241 guests, Ndhlovu and Senguder (2002) concluded that the overall rating on service quality was good and was even considered to be much better than expected. The researchers however cautioned that despite the good ratings, the perception of service quality is dynamic and fluid; and so hotels will have to constantly aim at exceeding guests expectations.

Cultural exposure

A typical all-inclusive hotel guest may spend very little time visiting attractions, meeting local people, taking tours and experiencing the local culture" (Jayawardena, 2002: 91). Many tourists spend their time in the hotel rooms and consequently do not receive information on historical background and social structure of the destination (Ciftci et al., 2007). Some guest have expressed profound satisfaction with the diversity of activities within the hotels while others have shown dissatisfaction in not been able to see the wider environment and meet Jamaican people (Hawkes & Kwortnik, 2006). From her experience with the family package of Jamaican all-inclusive, Oliver (1992) noted that activities for children could include field trips, bicycle rides, donkey rides, art and craft classes and reggae dance lessons. Master and Prideaux (2000), in their study of Taiwanese tourists visiting South East Queensland, Australia, found that culture was not a significant determinant of satisfaction levels; and that tourists were satisfied with the holiday package despite the presence of cross-cultural barriers.

Aesthetics

In a study of hotel accommodation for business guests both guests and hotel managers concurred that the most significant factor influencing the selection of accommodation is cleanliness of the hotel (Lockyer, 2002). The study also indicated that 'bathroom and shower quality', 'standard of bathroom maintenance' and 'comfort of mattress and pillow' were the most highly rated selection factors among business guests; and 'food service efficiency' was least rated. Morgan (2006) suggested that the distinctiveness of the surroundings along with the food and drink can become the sensory cues that give a leisure organization its sense of uniqueness.

THE STUDY

Developing and piloting of instrument

Two open ended questions were administered via face to face interviews to a convenient sample of 10 tourists at a Jamaican all-inclusive hotel. The tourists were asked to indicate:

- Their reasons for selecting Jamaica as the destination of choice
- The most important attributes of an all-inclusive package (satisfaction measures)

Fifteen reasons for destination choice and 32 measures of satisfaction were generated from the answers to the open ended questions. These were used to develop an instrument for this study. The instrument was then piloted by means of a self administered survey, at the same hotel, two weeks later, to 30 tourists. Respondents were asked to indicate destination choice reasons and satisfaction attributes that were most applicable to them from the list of 47 statements. The selection criterion for items to be included in the final instrument was set at 10%. That is, each destination choice reason and satisfaction attribute had to be selected by at least three informants from the sample of 30 before the item was included in the final instrument. This resulted in final instrument consisting of six reasons on destination choice and 23 attributes on satisfaction.

Final instrument

The final instrument used in the survey consisted of two sections. The first section was designed to collect information on hotel ranking, visitor information and reasons for choosing the destination. The top six reasons for choosing the destination were pre-coded and interviewees were asked to rank these reasons from 1(most important) to 6 (least important). The second section consisted of 23 satisfaction items and interviewees were asked to rate these items on a 5-point Likert type scale ranging from 1(strongly disagree) to 5 (strongly agree).

Data collection procedure and sample

The survey was administered in three Jamaican all-inclusive hotels ranked 3 star, 4-star and 5-star respectively. Five hundred instruments in total were distributed across the three hotels and management was asked for the survey to be administered to one adult per room.

One hundred and fifty or 30% of the instruments were returned; and a batch of 105 questionnaires which was found to be useable was selected as the sample for study.

Data analysis

Factor Analysis was used as the statistical technique for analysing the interrelationship among satisfaction items; and mean scores were generated for ranking destination choice reasons and satisfaction attributes. Additionally, the One-Way ANOVA was employed to determine relationships among hotel ranking, visitor information and satisfaction factors.

Reliability of satisfaction factors

The Cronbach's alpha test was used to determine internal reliability of satisfaction factors and the range of values stipulated by Hair et al. (2006) was employed as the measure of reliability.

RESULTS

Hotel ranking and visitor information

Thirty per cent of the sample was from the United Kingdom, 29% Canada and 27% the United States. These participants were all-inclusive guests in Jamaica at one 3-star hotel (28%); one 4-star (56%); and one 5-star (16%). Approximately 64% of these participants were visiting an all-inclusive hotel in Jamaica for the first time and over 78% was staying at the hotel between 7 and 14 days. See Table 2.

Reasons for choosing destination Jamaica

The top three reasons for choosing destination Jamaica were (i) weather (ii) beach front properties and (iii) friendly people. Of the six reasons identified, English speaking was least important. See Table 3.

Ratings on satisfaction items of Jamaican all-inclusive hotels

Friendliness of staff, service at bars, preference for beach front properties and comfortable and relaxing experience, in that order, were rated as the top four satisfaction items with mean scores above 4.4. Value for money (4.27) and quality of food (4.26) were also rated very highly. Additionally, the tourists were very satisfied with the security within the hotels and hardly gave thought to personal security. Available activities for children (3.22) and exposure to

Table 2: Hotel ranking and visitor information

Characteristics	Respondents (%)	Frequency
Nationality (N=105)		
US	27.4	29
UK	30.2	32
Canada	29.2	31
Other	13.2	13
Hotel Ranking (N=98)		
3 Star	27.6	27
4 Star	56.1	55
5 Star	16.3	16
All Inclusive Hotel Visits in JA(N=104)		
1st Visit	63.5	66
2nd Visit	15.4	16
3rd Visit	8.7	9
4-5 Visits	5.8	6
>5 Visits	6.9%	7
Time spent at hotel at point of completing survey (N=103)		
3 days or less	27.3	8
4-6 days	10.7	11
7 days	44.7	46
8-14 days	17.4	18
Length of stay (N=104)		
3 days or less	4.8	5
4-6 days	14.4	15
7 days	53.8	56
8-14 days	25.0	26
Over 14 days	1.9	2

Table 3: Reasons for choosing destination Jamaica

	Rank[a]	N	Mean[a]	Std. Deviation
Weather	1	103	2.14	1.456
Beach front	2	100	269	1.606
Friendly people	3	105	3.00	1.519
Value for money	4	105	3.12	1.763
Laid back atmosphere	5	102	3.30	1.722
English speaking	6	105	4.19	1.835

[a] Note: 1. Reasons ranked from 1 (most important) to 6 (least important)

Table 4: Tourist satisfaction with Jamaican all-inclusive hotels[a]

	Rank	N	Minimum	Maximum	Mean	Std. Deviation
Staff is friendly	1	105	3	5	4.60	.530
Service at Bar	2	104	2	5	4.45	.667
Preference for beach front properties	3	102	2	5	4.44	.752
Comfortable and relaxing experience	4	104	2	5	4.41	.691
Value for money	5	104	2	5	4.27	.672
Quality of food	6	104	2	5	4.26	.763
Cleanliness of rooms, bathrooms, etc	7	103	1	5	4.21	.762
Hardly think about security risk	8	103	1	5	4.18	.916
Variation in food choice	9	104	1	5	4.14	.769
Quality of beaches	10	104	1	5	4.13	.871
Size of hotel room	11	104	1	5	4.11	.775
Exact info given on package	12	102	1	5	3.99	.970
Waiting time for service	13	103	1	5	3.92	.763
Facilities	14	104	1	5	3.87	.860
Variation in restaurant choice	15	105	1	5	3.81	1.048
Easy access to shop	16	104	1	5	3.80	1.056
Quality of snack offered between meals	17	105	1	5	3.74	.991
Opportunities to see country	18	103	1	5	3.72	1.070
Frequency of snack between meals	19	104	1	5	3.71	.952
Entertainment package is good	20	103	1	5	3.56	.957
Preference for small size properties	21	103	1	5	3.50	1.220
Exposure to culture	22	103	1	5	3.50	1.009
Available activities for children	23	94	1	5	3.22	.894

[a] Note: 1. Five point Likert type scale was used for rating items:
1 (strongly disagree) to 5 (strongly agree)

Jamaican culture (3.5) were seen as the least satisfying attributes. See Table 4.

Factor analysis on satisfaction items

Factor analysis was considered as the statistical technique for analysing interrelationship among the large number of satisfaction items and to group these items into dimensions (factors). The assumptions suggested by Hair, et al. (2006) for factor analysis were tested in order to verify the suitability of this technique. The results supported the use of factor analysis with:

a. Sample size > 100

b. Kaiser-Meyer-Olkin Measurement of Sampling Adequacy = .773 (which is > acceptable value of .50)

c. Bartlett's Test of Sphercity = 817.254 with significance < .05

Principal component analysis with varimax rotation was then applied and seven factors were extracted from the 23 items. The seventh factor was dropped as it only represented one item: 'preference for small size properties'. The remaining six factors (22 items) were found to be significant with eigenvalue > 1 (rule of thumb suggested by Hair, et al., 2006 for keeping the factor) and explained 66.8% of the total variance.

The Cronbach's alpha that was executed for each factor indicated that all six factors (.60 < alpha < .80) were internally reliable. However, three of the six factors 'service quality and value', 'friendly and convenient' and 'beach front and food quality' generated values greater than .60 but less than .70 and were therefore "deemed [to reside within] the lower limit of acceptability" (Hair et al., 2006, p. 102). See Table 5.

Table 5: Factor analysis and reliability on levels of tourist satisfaction with Jamaican all-inclusive hotels

Satisfaction Item	Factor loading	Factor & overall mean	Eigen-value	% of variance	Cumulative variance	Cronbach's alpha
Exact info on package	.562	Surroundings & food choice: 4.05	6.799	30.906	30.906	757; n=6
Variation in restaurant choice	.660					
Variation in food choice	.692					
Size of hotel room	.528					
Hardly think about security risk	.636					
Facilities	.620					
Value for money	.449	Service quality & value: 3.54	2.428	11.037	41.943	.652; n=4
Entertainment package is good	.779					
Quality of snack offered between meals	.834					
Frequency of snack between meals	.770					

Table 5 (cont'd):

Satisfaction Item	Factor loading	Factor & overall mean	Eigen-value	% of variance	Cumulative variance	Cronbach's alpha
Opportunities to see country Exposure to culture Available activities for children	.773 .814 .690	Cultural exposure: 3.46	1.502	6.826	48.769	763; n=3
Quality of beaches Cleanliness of rooms, bathrooms, etc. Waiting time for service Comfortable and relaxing experience	.754 .829 .422 .494	Aesthetics: 4.19	1.445	6.56	55.336	713; n=4
Service at bar Easy access to shop Staff is friendly	.747 .638 .776	Friendly & convenient: 4.29	1.320	5.999	61.335	.646; n=3
Quality of food Preference for beach front properties	.586 .822	Beachfront & food quality: 4.36	1.201	5.458	66.793	.625; n=2

Factor 1: Surroundings and food choice

Six satisfaction items were loaded onto Factor 1: 'exact info on package', 'variation in restaurant choice', 'variation in food choice', 'size of hotel room', 'hardly think about security risk' and 'facilities'. These items were associated with surroundings, food choice and accuracy of the information in the all-inclusive package. Factor 1 was the fourth rated satisfaction factor when measured by mean score (4.05) although it represented approximately half (30.9 %) of the total variance with eigenvalue of 6.799.

Factor 2: Service quality and value

'Value for money', 'entertainment package is good', 'quality of snack offered between meals' and 'frequency of snack between meals' were the four satisfaction items that loaded onto Factor 2. The factor recorded an eigenvalue of 2.428, representing 11 % of the total variance and was the second least rated satisfaction factor based on the mean score (3.54).

Factor 3: Cultural Exposure

Items loaded on this factor were 'opportunity to see country', 'exposure to culture', and 'available activities for children. The factor recorded an eigenvalue of 1.502, explaining 6.8 % of the total variance; and was considered the least rated satisfaction factor with mean score of 3.46.

Factor 4: Aesthetics

The satisfaction items including in this factor were: 'quality of beach', 'cleanliness of rooms, bathrooms, etc.', 'waiting time for service' and 'comfortable and relaxing experience'. This factor explained 6.6% of the total variance with eigenvalue of 1.445; and was considered the third most important satisfaction factor based on the mean value of 4.19.

Factor 5: Friendly and convenient

'Service at bar', 'easy access to shop' and 'staff is friendly' were the three items loaded onto this factor. The factor mean was 4.29, making it the second most important satisfaction factor; and it covered 6% of the total variance with eigenvalue of 1.320.

Factor 6: Beach front property and food quality

This factor consisted of two items: 'quality of food' and 'beach front properties'. The factor recorded an eigenvalue of 1.201 and represented 5.5% of the total variance. Its factor mean was 4.36, making it the number one rated satisfaction factor.

Mean differences on hotel satisfaction factors by hotel ranking and visitor information

The One-Way ANOVA was used to determine the mean differences among satisfaction factors, hotel ranking and visitor information. This was decided as it was felt that an understanding of the satisfaction underlying dimensions (factors) was not enough to explain other meaningful relationships that may exist between these factors and other tourist related attributes. The results indicated that attributes of hotel ranking and visitor information were significantly different among satisfaction factors. See Table 6.

Hotel ranking

Respondents at differently ranked hotels varied greatly on their ratings on satisfaction factors. The results showed that Factors 1, 3, 5 and 6 ($p < .05$) were significantly related to hotel ranking. Guests at 4-star hotels are more likely to rate Factor1: 'surroundings and food choice' higher than those at the 3 stars. Similarly, 5-star guests are more likely to rate 'surroundings and food choice' higher than 3-star guests. Factor 3: 'cultural exposure' was more likely to be rated higher among 4-star than 3-star guests but higher among 4-star than 5 star; and Factor 5: 'friendly and convenient' was more likely to be rated higher by 4-star guests than their 3-star counterpart; and higher by 4-star than 5-star guests. Additionally, Factor 6: 'beach front property and food quality' would more likely to be rated higher in 5-star than 4-star hotels.

Nationality

Significant differences were found between nationality and Factors 1, 5 and 6. Canadians tended to rate Factor 1: 'surroundings and food choice' less than their US counterpart; and Factor 5: 'friendly and convenient' would more likely to be rated higher by Americans, Canadians and other nationalities than UK nationals. Similarly, 'beach front properties and food quality': Factor 6 would more likely to be rated higher by US than UK nationals.

Number of all-inclusive hotel visits

Mean ratings of the number of all-inclusive visits were significantly different on Factor 5: 'friendly and convenient'. Respondents who were visiting an all-inclusive for the first time in Jamaica rated the staff more friendly and the hotel more convenient than second time visitors.

Time spent at hotel at point of completing survey

Significant differences only appeared in Factor 3: 'cultural exposure' where guests who had spent 4-6 days so far [at their hotels] rated 'cultural exposure' higher than the ones who had so far spent seven days.

Length of stay

Significant differences were found between 'length of stay' on Factor 6: 'beach property and food quality' suggesting a relationship between the two variables. However, results were not conclusive on the direction of this relationship.

DISCUSSION

The relationship among customer satisfaction, quality and post-behavioural intentions provides theoretical grounding for the discussion on tourist satisfaction with all-inclusive hotels. More specifically, it is expected that the tourist who becomes satisfied with the quality of the package, will exhibit positive attitudes to brand loyalty, repeat business and referrals. The converse is also expected to be true where dissatisfied tourist will conjure attitudes leading to *bad press* and other negative post-behavioural intentions. Note also has to be taken of Deslandes (2006) who suggested that satisfaction needs to be heightened to the ultimate level of delight to further influence destination choice and repeat business.

The findings of this study are consistent with earlier studies done within the Caribbean (Deslandes, 2006; Ibrahim & Gill, 2005; Ndhlovu & Senguder, 2002) where tourists visiting the region have generally displayed a positive attitude towards all-inclusive hotels and the destination. The weather, beach front properties and friendly people were found to be the main reasons for the tourist visit to Jamaica. This was expected as the Caribbean is being positioned by tourism authorities as a region endowed with good climate, quality beaches and friendly people. Jamaica, being an English speaking country, was hardly material in destination choice presumably because the level of interaction in the holiday experience does not require fluency in the language on either the part of the guest or hotel staff; and so speaking English may not matter. Besides, with 90% of guests coming to Jamaica from english-speaking countries (US, Canada and UK), the language is supposedly taken for granted by all concern.

While 'friendly people' has been one of the key items for choosing the destination, this attribute was also noted as the most satisfying item within the all-inclusive experience. Again, the finding accords with Ibrahim and Gill's (2005) study of tourists to Barbados as measured by mean scores on the 5-point rating scale: 4.60 (present Jamaican study); 4.58 (Barbados study). Similarly, 'comfortable and relaxing experience' was another top rated satisfaction item from both studies: 4.41 (Jamaica); 4.67 (Barbados). Additionally, 'service at bar' and 'beach front property' rounded off the top four satisfaction items within the all-inclusive experience.

Cultural exposure of the all-inclusive tourist continues to be a discussion point among academics (Ciftci et al., 2007; Hawkes & Kwortnik, 2006; Jayawardena, 2002 and others) and the low rating on this attribute is once again consistent with findings of Ibrahim and Gill (2005) and suggests that this is clearly a down-side of the all-inclusive package. Master and Prideaux (2000) have, however, found that cultural imperatives are not significant determinants of satisfaction levels.

Both 4-star and 5-star guests rated surroundings and food choice higher than their 3-star counterpart. This is *true-to-form* and

Table 6: Results on One-Way ANOVA on mean difference on hotel satisfaction factors by hotel ranking and visitor information

Hotel ranking & visitor information	Factor 1: Surroundings & food choice	Factor 2: Service quality & value	Factor 3: Cultural exposure	Factor 4: Aesthetics	Factor 5: Friendly & convenient	Factor 6: Beachfront property & food quality
Hotel ranking	F = 5.562; p<.05 (3str=3.75< 4str=4.14)* (3str=3.75<5str=4.29)*	F = 1.468 no sig diff	F = 10.749; p<.05 (3str=3.11< 4str=3.76)* (4str=3.76>5str=2.87)*	F = 2.150 no sig diff	F = 8.191; p<.05 (3str=4.10<4str=4.89)* (4str=4.89>5str=3.96)*	F = 4.510; p<.05 (4str=4.20<5str=4.69)*
Nationality	F = 3.857; p<.05 (US=4.30> Can=3.84)*	F = 1.3 no sig diff	F = .223 no sig diff	F = 1.341 no sig diff	F = 5.603; p<.05 (UK=3.94<US=4.37)* (UK =3.94<Can= 4.45)* (UK=3.94<Oth=4.44)*	F = 3.759; p<.05 (UK=4.04<US=4.55)*
No. of all-inclusive hotel visits	F = .794 no sig diff	F = .773 no sig diff	F = .971 no sig diff	F = 1.890 no sig diff	F = 3.777; p<.05 (1st =4.40>2nd =3.92)*	F = 1.645 No sig diff
Time spent at hotel at point of completing survey	F = 2.252 no sig diff	F = 1.216 no sig diff	F = 3.034; p<.05 (4-6days=4.33> 7days=3.39)*	F = 1.334 no sig diff	F = .154 no sig diff	F = 1.828 no sig diff
Length of stay	F = 1.129 no sig diff	F = .587 no sig diff	F = .403 no sig diff	F = .108 no sig diff	F = .627 no sig diff	F = 2.706; p<.05 No sig difference between any of the groups taken 2 at a time

*P<.05

suggests that as you move up the luxury line of all-inclusive hotels, the surroundings and food choice will be seen more favourably by the guests. More surprisingly is that cultural exposure of the tourists seems to be more evident with 4-star guests than with 3- or 5-star. This could possibly be explained by the argument that hotels are on a drive to reduce costs with skyrocketing increases in the cost of food and beverage (Ciftci et al., 2007) and 3-star hotels are more constrained in budget and consequently cannot take on the added expenditure of cultural tours and outside hotel activities. In the case of the 5 stars, it is believed that cultural exposure is mitigated by the attitude to inclusiveness predominating at this level, that purportedly insulate the tourist from crime, violence and tourist harassment that is so pervasive in the current climate. The 4-star hotel, it would seem, lends itself to more cultural exposure as it provides more activities for guests (including outside tours) in its effort to compete on both sides of the *3/5 side* divide for the sought after tourist dollar. Additionally, and in accordance with expectations, beach front properties and food quality are more satisfying among 5-star than 4-star guests indicating that mark of distinctiveness of surroundings along with food and drinks that have become a sensory cue in leisure organizations (Morgan, 2006).

Canadians tended to rate hotel surroundings and food choice less than their counterpart from the United States, implying that Americans are seemingly more relaxed with issues concerning restaurant and food choice, size of hotel rooms, hotel facilities and security risk.

Friendly people and convenience offered by all-inclusive hotels were more satisfying to Canadians, Americans and other nationalities than to UK residents. Additionally, Americans were more satisfied with beach front properties and food quality than UK nationals. Since the satisfaction levels on both 'friendliness and convenience' and 'beach front properties and food quality' tended to be lower among UK than other nationalities further engaging and need for better understanding of the UK market may be desirable.

Guests visiting the all-inclusive hotel in Jamaica for the first time rated the staff more friendly and the hotel more convenient than second time visitors. This is easily attributable to the warmth of Caribbean people (Crick, 2003) and the novelty experienced with first time visits. Cultural exposure could also be viewed with a sense of novelty as guests who had so far spent four to six days were more in awe with opportunities to see the country and available activities for children than those who had so far spent seven days.

Finally, the results suggested that length of stay by guests is related to the beach front properties and food quality. Although the direction of this relationship was not established, it is assumed that Jamaican beaches and tantalizing food are factors that could positively influence the length of stay; and as Kang and Tan (2004) suggest, visitors who spend more days during trips were more likely to return than those vacationing less days.

RECOMMENDATIONS

The all-inclusive hotel is unquestionably the most significant contributor to Jamaica's tourism sector and is also considered to be a lucrative business by Caribbean hoteliers. However, with fierce competition within the region and in world tourism by extension, coupled with the fragile nature of the tourism business, all-inclusive hotel providers may consider the recommendations emanating from this study for improving the product.

Exposure to culture. Exposure to Jamaican culture is the least satisfying factor within the all-inclusive experience. In order to address this issue, hotel providers need to design more activities for children, utilize more of the reggae and dancehall, include more tours to attractions and places of interest, of course, with the required safety features; and expose the tourist at every opportunity to the richness of Jamaican foods, history and heritage.

Service quality and value. While the food is rated highly and the staff is seen as friendly, service quality and value as indicated by frequency of snacks and meals, entertainment package and overall value for money are other indicators that generate relatively low satisfaction levels. It is felt that the all-inclusive hotels could hardly do much more with frequency of food and snacks with the rising cost of food. However, more variety in food and snacks could possibly improve satisfaction. The entertainment package, on the other hand, could most definitely be improved through more creative ways of showcasing Jamaica, not only through music and dance, but games of all kind that are indigenously Jamaican. In taking these measures the perceived value of the package would also be vastly improved.

CONCLUSION

The study contributed to the literature in the areas of choice destination and visitor satisfaction. Six reasons for choosing Jamaica as a Tourist destination and 23 attributes of satisfaction were identified from the perspective of the all-inclusive tourist. The weather, beach front properties and friendly people were the most important reasons for choosing the destination; with friendly staff and service at hotel bars being the most satisfying attributes. Six factors of satisfaction were generated by use of factor analysis and 'beach front properties and food quality' and 'friendly people and convenience offered by hotels' were the two most satisfying factors. Cultural exposure was determined to be the least satisfying factor. It was concluded that hotel ranking, visitor nationality, number of visits, time spent at the hotel at point of completing survey and length of stay would influence at least one of the six satisfaction factors. Exposure to culture and service quality and value were areas recommended for improving satisfaction levels.

The study is limited in sample *make-up* – convenient sample, small sample size, non-randomness, etc and is consequently restricting in generalizing findings. Nonetheless, findings and associated recommendations, where practicable, could be considered for implementation by hotel providers. Further research could confirm these findings and address other issues such as tourist satisfaction of all-inclusive hotels versus other accommodation types. The study could also be replicated, at least within the region, aimed at comparing all-inclusive hotel satisfaction factors across Caribbean countries. Satisfaction factors could also be assessed across market segments for better niche marketing of the all-inclusive product.

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Accommodating Uncertainty and Minimizing Risk

Can Foresighting and Scenario Planning Provide a More Durable Basis for Sustainable Tourism Development in the Caribbean?

K'adamawe K'nIfe

Key words:

foresighting

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sustainable tourism

development

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Regionally the tourism industry is a critical element in generating high growth rates necessary for sustainable development. Currently (at 2004 figures) this sector contributes 4.5% of GDP directly while 14.8% of GDP is directly or indirectly derived from the industry. The forecasts up to 2014 suggest that the direct contributions would approximate to 5.2% of GDP and direct/indirect contributions to 16.5% of GDP (WTTC, 2004).

Achieving these projections is however increasingly threatened by a number of exogenously and endogenously determined factors that can create shocks and discontinuities. If these factors are not prepared for the resulting discontinuities can prevent the region from attaining its forecasted objectives.

As the region becomes more open, the risk and uncertainty associated with these shock factors increases. The traditional approach to planning – conventional Forecasting – has been inadequate in anticipating and bolstering the planning process to deal with these shocks. Foresighting and Scenario planning has evolve as responses to this failure. They accommodate uncertainty and risk through anticipating and preparing for multiple futures.

The paper examines the usefulness of Foresighting and Scenario planning as an alternative and more robust approach to planning for sustainable tourism development in the region.

IN 1989, as part of an agreement to deepen the regional integration process, member countries CARICOM established the CARICOM Single Market and Economy (CSME). The CSME was conceived as a critical institution geared towards facilitating economic development of Member States in an increasingly open and competitive global environment. It was anticipated that through the establishment of the CSME, CARICOM countries could be better positioned to develop exports for both intra-regional and extra-regional markets, attract investments and negotiate more effective trade and investment arrangements in the global economy. The CSME is premised on the free movement of goods, services, and factors of production; it also includes the adoption of key support arrangements, such as the harmonization of laws and regulations governing economic activities in CARICOM, and effective dispute settlement mechanism (Kirton, 2003: 3).

As the region attempts to establish a sustainable dynamic for development, the focus has been on what sector/s would be the key economic driver. There has been consensus that the tourism sector should be the lead given its significant contribution in many of the islands (CARIBTRAN, 2002; Hayle, 2005).

Clayton et al. (2004) highlight that the World Travel and Tourism Council (WTTC) 2004 figures reflect that for the region this sector contributes 4.5% of GDP directly while 14.8% of GDP is directly or indirectly derived from the industry. The WTTC (2004) further argues that up to 2014 the direct contributions would sum to 5.2% of GDP and direct/indirect contributions to 16.5% of GDP. The industry is currently (2004) projected to contribute $US8.6 billion to GDP directly, and US$28.4 billion to the economy of the region within the current year. For 2014 projections are 18.4 billion and 58.4 billion respectively. Additionally it now supports 814,600 jobs directly, and 2,416,500 jobs, once all direct and indirectly related employment is taken into account. Projections for 2014 are 1.09 million and 3.1 million respectively.

The WTTC 2004 league tables in Annex I further substantiate the importance tourism has in the region in contributing to current and projected GDP and employment. The data indicate that for five out of the ten countries listed, the combined direct and indirect contributions to GDP as a percentage of GDP is more than fifty per cent. This indicates a strong dependency on this industry reflecting commodity concentration. In a situation of commodity concentration, there is increasing risk for economic collapse if some exogenous shock should occur, without the appropriate mechanisms in place to deal with such eventualities. This dynamic highlights the importance of meaningful and effective risk management.

This dependency on tourism is projected to increase further as evidenced by the growth projections of direct and indirect contributions to GDP as a percentage of total GDP. As reflected in Annex I, positive growth is expected among the countries; ranging between 2.1 per cent for Dominican Republic and 5.6 per cent for Belize. The situation for employment is similar to that of contributions to percentage contribution to GDP. Out of the ten countries listed, total number of direct and indirect job accounts for more than 20 per cent of all employment, excepting for three (Cuba, Aruba and Dominican Republic). Furthermore, in all countries there is the expectation that both direct and indirect employment will increase by 2014 (see WTTC 2004 league tables – Regional league tables comparative data for employment – Annex I WTTC 2004 league tables GDP and Employment).

The data above reflect the remarkable degree of dependence of the Caribbean nations as a whole on the travel and tourism industry. Five Caribbean nations lie in the global top twenty in terms of the percentage of total employment that is related directly or indirectly to the industry. Furthermore, the World Travel and Tourism Council (2004) argues that: "Travel and Tourism contributes 14.8% of total GDP in the Caribbean, 12.9% of total employment, approximately 2 million jobs and 18.2% of export earnings from international visitors and tourism goods."

The emerging question however is 'will this be sustained?' While this paper cannot address all the various threats to sustainability, it focuses on developing robust strategies under situations of risk and uncertainty associated with long term planning for open industries, in particular regional tourism.

The paper therefore examines the usefulness of foresighting and scenario planning as an alternative and more robust approach to strategic planning in preparing for shocks within a framework for sustainable tourism development[1] regionally.

OPENNESS, RISK AND PLANNING

Given the increasing openness of the region fueled by the desire to increase both inter and extra-regional trade, the region becomes more vulnerable to the risks associated with increasing shipping and visitor arrivals throughout the region – land, sea and air. Increasingly, the Caribbean Sea is one of the busiest water ways – Jamaica having one of the major transshipment points. Additionally, there are associated risk with the increasing threat of terrorism and its potential impact on the cruise shipping industry, one of the fastest growing areas of regional tourism. Any shock within this sector would be disastrous to the region, both environmentally and economically.

However, the discussions on the CSME tend to focus on economic and political issues (Harvey & Clayton 2004) with little or no attention to risk management generally. As such, the occurrence of an exogenous or endogenous shock could create significant discontinuities. The traditional approach to planning – conventional forecasting – has been inadequate in anticipating and bolstering the planning process to deal with these shocks. Foresighting and Scenario planning have evolved as responses to this failure (Wehrmeyer et al., 2002). This process accommodates uncertainty and risk through anticipating and preparing for multiple futures (Schoemaker, 1995, 1997; Heijden, 1996; Ringland, 2002, 2002). If these potential shock factors are not prepared for, the resulting discontinuities can prevent the region from attaining its forecasted objectives.

This concern was highlighted in the recent discussion held in Guyana on July 1, 2008 at a Conference of CARICOM Heads of Government. The Caribbean Press Release.com revealed that:

> Eleven of the Heads of Government of the Member States of CARICOM and four of the Heads of Government of the Associate Members will focus on matters related to Tourism, the single largest contributor to the Gross Domestic Product (GDP) of the Community...The leaders will discuss Minister of Tourism and Civil Aviation of Saint Lucia as they search for options to enhance regional tourism in the context of current international trends. These trends include rising prices of food and fuel and cutbacks in routes by airlines... There are concerns that recent global developments, such as the rising cost of fuel and changes in flight schedules by US-based airlines, could undermine the viability of an industry that provides thousands of jobs for Caribbean nationals (CMC 2008, 1).

If these eventualities are not prepared for they can potentially disrupt the regional plans for establishing a durable dynamic for development within this industry. As stated by the Caribbean Hotel Association (CHA):

> The CSME offers an exciting opportunity to achieve a harmonized approach to tourism policy among CARICOM states. This would compliment the industry's regional marketing initiatives... As the largest industry in the CSME area, and the only viable economic growth trajectory for some CARICOM states, tourism must take centre stage within the CSME. Tourism is one sector where CARICOM

> states have the capacity to be leaders in the global marketplace despite their small size and vulnerability. They already are for cruise tourism, and can be for land-based tourism as well. A strong regional policy framework through the CSME, that provides the right enabling environment for investment and sustainable tourism development, will help the public and private sectors to achieve this objective (CHA 2004: 4).

SUSTAINABLE DEVELOPMENT AND RISK MANAGEMENT

There is no single agreed definition of sustainable development. The Bruntland definition suggests that it involves establishing a durable process in which each generation can satisfy its needs without jeopardizing the chance of future generations satisfying their needs also (UN, 1992; UN, 2002). While this definition highlights inter-generational equity, the need for a greater emphasis on intra-generational equity has come to the fore in recent years. This is particularly important for many developing nations, who find that growth can co-occur with growing domestic inequity.

Ideas of sustainable development have evolved within a particular context. From Stockholm (UN, 1972) through to Johannesburg (Earth Summit, 1992; UNDP, 1997; World Summit, 2002; UNDP, 2002) different definitions have emerged as the debate has evolved. However, actual implementation has been more influenced by a relatively technical (as opposed to political) focus, and therefore guided to a greater extent by the developed countries, in particular Europe and the US. Ideas and elements of concern from developing countries have been relatively under-represented in this regard. It is therefore important that the Caribbean should be involved in both shaping the new global agenda, and developing its own interpretation and implementation of these important new models.

A regional adaptation of the Bruntland definition of sustainable development implies "a dynamic that manifests qualitative and quantitative improvements in the quality of existence among inhabitants within the region, both now and in the future" (Harvey & Clayton, 2004: 8). The proposed definition implies an underpinning set of environmental ethics that moves beyond narrow anthropocentricism to reflect the importance of environmental values, as against the assumption that human economic gain is the sole determinant of value. This definition implicitly reflects the importance of environmental ethics both within and among generations, producer responsibility and transboundary risk management, as well as the geopolitical framework in which we operate. The diagram below outlines the framework for generating a sustainable dynamic for development and by extension, sustainable tourism development – highlighting the core elements within this paradigm.

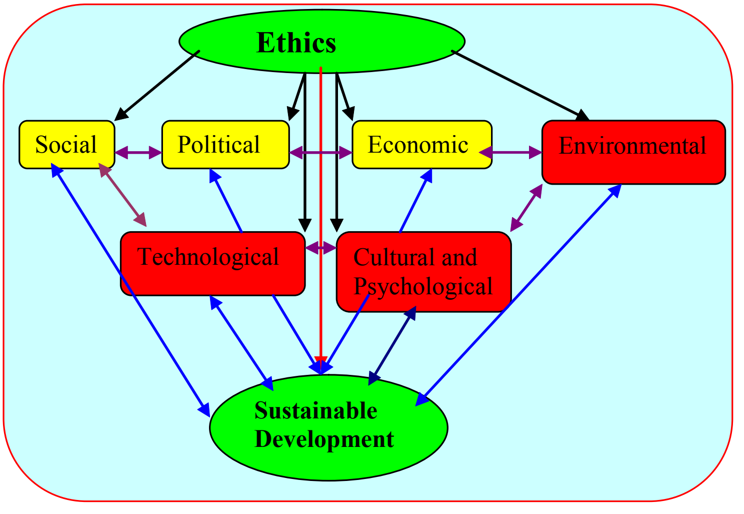

Diagram 1: Generating a Sustained Dynamic for Development

Traditional planning approaches to development tended to focus on three factors, political, social and economic. The shifting of the paradigm from development to sustainable development emphasises the inclusion of other core elements including, technological, cultural and psychological and environmental factors (Harvey, 2006). The interaction of these elements significantly influence how effectively one can establish a durable dynamic for development within a sector, industry or country.

The sustainability of the industry is predicated on its ability to increase intra and extra regional trade. This however opens the industry to associated transboundary risk. Transboundary risk refers to any potential negative externality that might result from the movement of goods and services within and across borders over the entire life cycle of those goods or services. Transboundary risk management is therefore the anticipation, communication and attenuation of potential negative externalities that might result from the movement of goods and services within and across borders over the entire life cycle of those goods or services.[2] According to Cowell and Clift (2002: 1) and Clift (1993: 1), Life Cycle Assessment (LCA) "is concerned with the environmental impacts of products and services from cradle to grave… considering all the environmental impacts, from the primary raw materials right through to ultimate waste disposal".

The approach to production and delivery of goods and services partly determines how much 'waste' is generated and how it is disposed (some goods and services produced are themselves potentially hazardous and thus have risk associated with their use and disposal).[3] This highlights the importance of local, regional and international transboundary risk management. How can one mitigate the potential dangers associated with trade and flows of goods and services (Thompson et al., 2001) within the tourism system?[4] This is a crucial issue for the CSME because its primary raison d'être is to increase both intra- and extra-regional trade – with tourism being the central driver (Kirton, 2003).

The importance of transboundary risk management was highlighted by concerns in the 1980s about cross-border acid deposition and international fallout from Chernobyl (Linnerooth-Bayer, 2001). Some of the potential problems within the Caribbean could be identified *ex ante,* but an appropriate policy response requires an assessment of risk. This raises other important questions, as risk analysis involves both objective (quantification) and subjective (perception and behavioral change) dimensions. Understanding the way in which culture (Thompson et al., 2001) can influence stakeholder responses is therefore crucial, especially as it relates to the formulation, adaptation and implementation of risk-management techniques. Additionally elements of risk perception, communication, amplification and attenuation are related to levels of stakeholder interest and trust, which are also fundamentally implicated in resolving these issues.

As commerce, trade, traffic and other such interactions among nations increase, along with the development of transboundary production and trade, the associated risks of transboundary environmental problems will also tend to increase. While some countries internalize their hazards, for example, others may chose to (effectively) export them, although international accords like the Basel Convention limit the scope for exporting certain categories of waste. It is therefore possible for some risks to be absorbed involuntarily, while others may be 'invited' through trade. The region, with its current focus on increasing trade internationally, might unwittingly become a victim of hazardous exports, as the country with the lowest standards in this regard may become the *de facto* entry point for the region as a whole. Recent concerns about food quality of beef and chicken imports into Jamaica, for example, highlight concerns about the 'voluntary' absorption of risk, in areas such as trade of goods such as food.[5] There are traditionally a number of risks associated with tourism in the areas of waste management and disposal, transmutable disease, cultural hegemony, and the adaptation of negative social habits resulting from a demonstration effect. More recently the increasing terrorism has emerged as a credible threat to the tourism system.

It is therefore critical that these concerns, and the associated issues about standards and regulations, are addressed at the regional level. This question links directly back into the geopolitical framework, and our relations with Europe, the United State (US) and other countries, including other developing countries. While Europe has moved recently to adopt a much more proactive stance in reducing transboundary risk, the same commitment seems to be absent in the US – except in areas of terrorism. This gives grounds for concern as the CSME positions itself to enter into arrangements with the World Trade Organisation and Free Trade Area of the Americas, both of which are heavily influenced by US trade policies.

Europe and America also diverge in terms of the weight attached to issues of sustainable development. There are other important factors, however, including proximity, political priorities (and perhaps expediency), entrepreneurial arbitrage or cultural inertia, which might in practice be prioritized over environmental prudence. The question, therefore, is whether the CSME can adopt and prioritize proposals for sustainable development. This raises important queries as to the potential obstacles, with regard to issues of trust, corruption, institutional capacity and infrastructural readiness. The ability to move and the speed with which the CSME moves to resolve these issues will therefore largely determine the extent to which the regional agenda can incorporate sustainable development.

The current priorities and modus operandi of the CSME do not appear to provide an entirely adequate basis for resolving matters of environmental ethics, producer responsibility and transboundary risk management. This is reflected in the fact that even the amended Chaguaramas protocols, as proposed under the CSME, do not currently prioritize formulation within the paradigm of sustainable development, even though other potential major trading partners (such as the EU) have taken some steps to incorporate these ideas into trade negotiations and frameworks.

Inclusion of these elements for consideration could, however, provide a more durable basis for establishing parameters for long-term trading arrangements, as this would help to reduce the risk – for example – that non-tariff barriers in the form of safety and environmental regulations might subsequently be used to close off particular markets.

Omission of these factors might therefore appear to present short-term benefits, but might create problems in future – as well as creating a risk to regional sustainability. It would be essential to build stakeholder consent at both local and regional levels for any incorporation of sustainable development parameters in trading agreements – but it is important to note that the will to actually implement these agreements will be even more crucial.

FORESIGHTING AND SCENARIO PLANNING – ALTERNATIVE TO CONVENTIONAL FORECASTING

Preparing for risk under uncertainty in long term strategies requires a fundamental shift in the approach to strategic planning. The dominant approach to planning has been the use of the conventional forecasting technique. Given that planning involve looking forward within a given time period (Brech, 1964), inevitably, it will incorporate some kind of forecasts (Grove, 1976). Conventional forecasting usually involves the projection of the past and the present into, the future based on the statistical summaries of expert opinion (Heijden, 1996). It usually seeks to identify the single most likely disruptive factor and create the one best strategy to contain it. While the conventional approach to planning has been useful in short run predict and control situations, it is less useful as the planning horizon increases (ENACT, 2000; Banner, 1996). Given that it is based on dominant trends, it will scarcely produce solutions that would foresee shocks that in the long run can generate discontinuities (Dreborg, 1996).

There are many tools used in strategic planning, some of these include: Forecasting, SWOT Analyses, Delphi Methodologies and Systems thinking. Among these planning tools the use of Scenarios has evolved as a methodology that incorporates and sometimes replaces some of these traditional tools. Scenario planning is a broad field and thus presents some difficulty in arriving at an acceptable definition (Veen Groot et al., 2001). Groot further states:

> Kahn and Wiener define scenarios as 'hypothetical sequences of events constructed for the purpose of focusing attention on causal processes and decision-points'. In their view, scenarios answer two questions: (1) 'Precisely how might some hypothetical situation come about, step by step?' and (2) 'What alternatives exist, for each actor, at each step for preventing, diverting or facilitating the process'?

Scenarios are sometimes considered to be narrative description of a 'possible future' based on a set of consistent elements, grounded within a framework of clear assumptions encompassing both quantitative and qualitative elements presenting stories about the way the world might turn out tomorrow.

Scenarios can be a simple story or a structured discipline to aid in planning dynamic situations where there are accelerated change taking place creating greater degrees of uncertainty and complexity. Schoemaker (1997) argues that in situations of high risk and uncertainty companies should consider three classes of knowledge when thinking about the future:

> Things we know we know; things we know we don't know; things we don't know we don't know… Various biases – overconfidence, narrow framing, the tendency to look for confirming evidence – plague all three classes, but by far the greatest havoc is caused by errors of the third kind. Although no fail-proof techniques exist to avoid them, much improvement can be garnered by focusing our attention on classes two and three.

The tourism industry is one wherein there are many drivers of the 'unknown unknowns, and hence the need for robust strategic planning. Diagram 2 below (Dynamic for sustainable tourism development) outlines the various areas through which shock factors might arise which will impact upon the tourism system.

From the diagram below the regional endogenous factors (governance… in yellow circles) are all indirectly related (indicated by dashed arrows) and also directly impact upon the dependent variable (indicated by unbroken arrows) – sustainable tourism development (in red circles). The exogenous factors (geopolitics – in green circles) are also indirectly related to each other but are also directly related to establishing 'sustainable tourism development'. While the region can impact the endogenous variables through policy development, it cannot impact the exogenous ones. The exogenous factors have the greatest potential to derail the development process and thus their negative impacts must be adequately prepared for. Elements of these factors have occurred at various times throughout

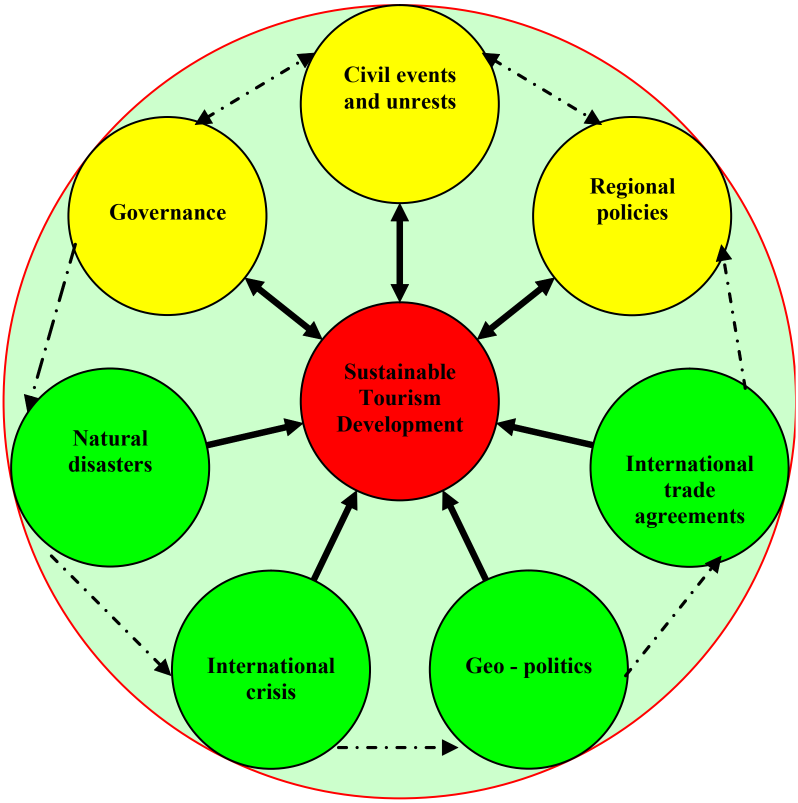

Diagram 2: Dynamic for Sustainable Tourism Development

the history of the region development, from the oil and wheat crisis in the 1970s, the Asian and Mexican crisis, the formation of GATT NAFTA and WTO and the occurrence of numerous natural disasters throughout the region.

The major factors can been categorized (but not limited to) as follows:

- Governance: Reflect changes in political parties, ideologies; elections and changes of government which impact regional governance.
- Civil events/unrest: Significant events (demonstrations, riots, strikes etc.) with political and/or economic consequences (such as declaring a state of emergency, or lost market opportunity)
- Geo-political: Important changes in the international context (emergence of OPEC, NAFTA, WTO, EU expansion, international

market crises and recessions, reallocation of donor funding to reflect new priorities, etc).

- Regional factors: Institutional and policy changes in the Caribbean (the desired move to establishing the CCJ and CSME, etc).
- Trade agreements and flows, financial and commodity markets: changes in international prices of commodities (current situation of increasing oil and wheat prices), impact of financial crisis in other countries/region (US mortgage fall out and the persistent recession it its economy), and the emergence of new amendments to trade agreements (WTO and EPA) on national development, and the emergence of major players in world trade including Brazil, China and India.
- Natural disasters: hazardous changes in weather patterns that can have disastrous effects on the region, including, hurricanes, storms etc.
- Terrorism: overt and covert actions of terrorist in the generating market, transit routes, destination or the local industry.

If the region is to realise the agreed objective of regional sustainable development with tourism as the key driver, the potential negative effects from changes in these factors must be prepared for.[6]

Scenario planning like foresighting evolved in response to the shortcomings of the more traditional approaches to planning. It was originally used by the military and later by private, public and non-governmental organizations. Ellis (2000) points out that the earliest recorded use dates back to the Chinese military strategist Sun Tzu and the development of chess in India.

The earliest scenario learning (SL) was developed with the invention of chess in India and by the great Chinese military strategist, Sun Tzu. Only after World War II did it become widely used in the modern military, primarily the Air Force. In the 1960s, Herman Kahn who had been part of the Air Force SL development, refined scenarios as a tool for business forecasting. Although Kahn later became one of America's top futurists, it was Piere Wack at Royal Dutch /Shell who demonstrated it is true power for business. (Ellis, 2000).

Heijden (1996) further substantiates these claims as he notes that the technique has a long history emerging from its application in war games. Its usage in civilian affairs started through RAND corporation during and after World War II, and was subsequently developed by the Hudson Institute, set up by Herman Kahn after he resigned from

RAND. "...[from] the late 1960s onwards scenario planning took off in the corporate world."

He further adds that:

> [in] the beginning, scenario analysis was essentially an extension of the traditional 'predict and control' approach to planning, except that a single line forecast was replaced by a probabilistic assessment of different futures, leading to a 'most likely' projection. It did not offer a fundamental advance over other forecasting approaches… [however the central idea within the process now] relies not on probability [as in the rationalist school] but on qualitative causal thinking [the processual school] (1996: 15-16).

The technique was adopted and grew successfully "due largely to the failure of the trend projection approaches of the 1960s to provide credible forecasts, especially in the time of major structural changes" (Bunn, 1993: 291). Its popularity grew when Royal Dutch/ Shell applied it in anticipating the oil crisis (Strannegard, 1998) and thus being "far better prepared than its rivals for the OPEC-induced price hikes" (Baldock, 1999).

Subsequently the use of the technique has grown, especially as the business environment becomes more open and risk and uncertainty increase (Frieswick, 2002). However, Frieswick (2002) goes on to highlight Schwartz's analysis of a study by the Corporate Strategy Board that reported that one-third of major American companies now engage in scenario planning. Schwartz's analysis added the corollary that only one-third of them do it correctly (even Shell, for example, one of the leading exemplars of long-range scenario planning, was embroiled in controversy in 2003–2004 when it became apparent that the company had overbooked its oil reserves by about 20%).

Whilst these concerns are genuine, the popularity of the technique has grown. The technique is now used by cooperate entities and countries in their planning for the public sector (Ringland, 2002).[7] Ringland argues that in the private sector scenarios are used in connection with "political and economic uncertainty, changes in industry structure, new markets, new business opportunities, customer strategy, skill requirements and business disposals" (2002: 2). In the public sector "they are often concerned with dealing with new structural challenges as in getting the big picture right. One of the exciting growing uses of scenarios is for public policy, to create a common language and vision in a city, or country or on environmental issues" (2002: 6). However, as warned, with rising popularity and usage care must be taken with how the technique is carried out to maintain its credibility as a useful technique.

Ringland (2002: 145-52) outlines a checklist for developing scenarios in public policy; however, a more relevant approach for the tourism industry is highlighted by Birkner and Birkner (2002) who argue that in conducting industry scenario the process should include the following steps:

1. Identifying critical issues or decisions to be made. (What keeps decisions makers awake at night?)
2. Listing key industry factors and how these industry factors affect you. Use Michael Porter's Five Forces Model of Competition:
   - Threat of new entrants
   - Bargaining power of suppliers
   - Bargaining power of buyers
   - Threat of substitute products
   - Rivalry among competing firms
3. Exploring what is happening in the overall environment.
4. Identifying what external factors are affecting you.
5. Factors relating to: demographics, political/legal issues, technology, social/cultural concerns, economic trends, global conditions,
6. Ranking the key factors and events and developing scenarios that address the most critical factors and trends.
7. Using the brainstorming process to anticipate the future.
8. Identifying the implications of this evolving process.
9. Selecting the leading indicators.

Foresighting, a technique which is incorporated in the scenario planning process, also evolved as a response to the failures of traditional predictive planning techniques (Wehrmeyer et al., 2002). The traditional approaches to planning did not adequately deal with the impact of changes in qualitative factors that affected the developmental process in fundamental ways. Foresighting grew as an alternative for such situations. This technique is employed particularly in the scenario exercise where there is a need to identify the critical technologies which are required to attain a desired future or will accelerate or disrupt a development trajectory within a sector, industry and/or country.

Though the process has not been in use for as long as scenario planning, its use has been increasing in both developed and developing countries, in the private and public sector (Wehrmeyer et al., 2002). The technique is used for identifying opportunities and threats, more typically those that are long run (Berkhout and Hertin, 2002). Presley and Meade (2002**)** argue that the process increases general comprehension of the factors that determine the long-term future.

As with scenario planning, foresighting involves both qualitative and quantitative systems for monitoring indicators of evolving trends and developments that inform planning for the future. Wehrmeyer et al. (2002) argue that "foresighting is a deliberative process that involves not the identification of the most likely probable scenario but the evaluation of many possible, desirable or feasible scenarios".

There are several approaches in conducting the foresighting exercise. ENACT (2000: 13) argues that foresighting involves:

- Starting from the premise that the one thing that we can rely on to happen is change
- Moving from being fearful and resisting change, to accepting and embracing change – and then to making and shaping change
- Working with groups of thinkers and doers outside the institutionalized planning processes to identify possible future scenarios
- Asking hard questions, and thinking the unthinkable: What would happen if...?
- Identifying, comparing and evaluating a range of possible future options
- Taking into account 'anticipated discontinuities'
- Starting from each scenario, and analysing back from each of the alternative futures to the present day

Both foresighting and the scenario planning processes are most useful:

- Where the problem is complex, the planning horizon is long, major changes are anticipated with adverse effects, and thus need to be analysed and prepared for (Wehrmeyer et al., 2002).
- Where long-term scenarios are being considered and discontinuities are likely as a result of changes among interdependent variables (ENACT 2000).
- Where there is need to generate buy-in and stakeholder

consensus on an agreed vision.

Jean-Claude Baumgarten (WTTC, 2003: 1), President of World Travel and Tourism Council (WTTC) commenting on the 'Blueprint for New Tourism' emphasized:

> There is now a new consciousness amongst governments that they cannot leave the growth of Travel & Tourism to chance. What is needed is a new vision and strategy involving a partnership between all stakeholders – public and private – to turn future challenges into opportunities. The Blueprint for New Tourism spells out how that can be achieved.

He argued further that:

> New Tourism requires a much stronger partnership between the private sector and public authorities. It is geared to delivering commercially successful products – but in a way that ensures benefits for everyone. New Tourism looks beyond short-term considerations. It focuses on benefits not only for people who travel, but also for people in the communities they visit, and for their respective natural, social and cultural environments.

The scenario planning and foresighting process accommodates the imperatives for establishing and achieving the vision of 'New Tourism'. However, it must be understood that no one technique will necessarily hold all the answers.

While the foresighting and scenario planning process has many benefits (Fahey et al., 1998; Hicks, 1996) there are various pitfalls to avoid (Jones, 2002; Fahey et al., 1998; Thomas, 1998; Schoemaker, 1997). One is the perennial problem of accommodating a relatively lengthy planning process into the decision-making system in an organization that still has to manage the day-to-day issues. Wehrmeyer et al. (2002: 32-33) identify three rather more fundamental problems, as follows:

- The 'Zeitgeist' problem. The group dynamics can themselves affect the outcome of the deliberative process. This means that different foresighting efforts can have similar results, as different groups focus on the same small range of currently dominant social and cultural themes.
- The 'opacity of context' problem. This is common in technology foresighting, where participants can become very focused on particular aspects of technology but omit to fully evaluate the social, economic and political implications of the associated technology change.
- The 'event evaluation' problem. People tend to overestimate

the likelihood of low probability events and underestimate the probability of very probable events. There is an equal tendency to distort the representativeness of events, essentially by focusing on striking but basically irrelevant details, which is liable to undermine the viability and usefulness of future scenarios.

Additionally, there are potential impediments to the adaptation of this process especially among developing countries like those in the region. In order for these techniques to be successful, these key limitations must be taken into account. These include:

- Formulation of scenarios is easier than the implementation of the resulting plans.
- Plans might require major shifts in political or planning cultures, which are usually problematic.
- No technique is a panacea. Overselling the technique can create a false sense of hope for quick solutions to what are often long-term structural problems.
- There is a common misperception that scenarios are predictions, and a common tendency to try and pick good/bad scenarios.
- The process incorporates those decision makers who can influence whether the outcomes are implemented, but the process may threaten their interests.
- The process does not give short-term solutions, and requires time and commitment to the process.
- The process can become too complex, and lead to over-planning. This increased complexity can limit the common understanding of the scenarios and thus handicap the implementation process.
- While scenarios can help to free thinking from the trammels of current biases, they can themselves be susceptible to bias, especially when persons look for evidence to confirm their beliefs and prejudices, or evidence to contravene conflicting views. People may also see causal relationships in events that merely coincide (Schoemaker, 1995; Bunn, 1993).
- Every planning process happens in a context; the context may constrain the outcomes.
- The influence (and biases) of influential participants may inhibit the input from more junior participants.

The adaptation of this process requires fundamental shifts in approaches to governance and strategic planning. Buy-in to these non traditional ideas of governance and planning might not easily be accepted by the existing decision makers – especially in situations where the thinking is that the existing process is operating successfully, as it is in the tourism industry. If the above limitations are not acknowledged and controlled, the process can be vitiated to the point where it becomes less useful. In practice, the technique is often combined with other techniques including forecasting, systems thinking and other dynamic modeling techniques. This situation however can be meaningfully addressed through proper facilitation of the scenario planning and foresighting exercise.

In using these two techniques as a single process to bolster strategic planning for sustainable tourism development, these strengths and weaknesses must be considered. The process is dynamic and inclusive and thus offers a process that is imperative to generating consensus on an agreed objective. Addressing transboundary risk in an open system like tourism requires such a process, given the inadequacies of the traditional approach – however, no one approach is a panacea.

CASE: THE SOUTH AFRICAN EXPERIENCE

The fact of no one technique being a panacea was highlighted in the Republic of South Africa Foresighting and Scenario planning process. Post apartheid there was the need to chart a course for South African long-term development (2020), which required consensus among all the stakeholders. The socioeconomic and sociopolitical situation was unstable. Additionally, there were divergent views as to the vision and direction of the country. The absence of a clear direction and vision in post apartheid South Africa could lead to chaos. Scenario Planning employing Foresighting was considered the most appropriate process to generate the needed consensus and vision and as such was employed. South Africa thus became the first developing country to successfully apply this process in developing national long-term strategic planning.

Generating consensus on the way forward required a methodology which was inclusive and robust. According to Deputy Minister of Arts, Culture, Science and Technology, Bridgette Mababdla, Scenario planning and Foresight process brought together individuals from a number of sectors and required cooperation among several government departments and stakeholders in the academia, science councils, the private sector and civil society.

Foresighting was used to identify critical technologies while scenario planning was used to reproduce four potential futures.

Each of the scenarios portrayed a different course for South Africa's development up to the year 2020. The interaction of the key drivers such as economics, technology and sociopolitical factors formed the bases for four possible scenarios. Delphi surveys and SWOT analyses were also employed with scenario planning in the exercise. The tools were used to identify technologies and research areas that would both promote an improved quality of life and generate wealth creation.

In carrying out the process in the tourism sector in South Africa various lessons emerged that are also instructive to the Caribbean in developing a long-term strategy for the tourism industry. It was emphasized that caution must be taken to ensure that the scenarios met the criteria of being:

1. **Relevant**- it had to connect to the current 'mental models' and shed light on the current circumstances and concerns.
2. **Emergent**- the current thinking had to be challenged and elements shadowed elucidated.
3. **Plausible**- must be logical, fact based and seen to improve methodical understanding.
4. **Clear-** clarity in presenting the alternative models is an imperative; these models should also be memorable and form a part of the national conversation.

It was highlighted that this exercise is not merely a once-off intervention, but rather a continuous process. As such, in the Caribbean this requires full integration within a regional system of innovation. Some of the critical lessons learnt included:

a. Continuity of leadership and clear planning is essential.
b. A committed and continuous core for the 'Sector Working Group' is required.
c. An appropriate support structure and direction by sponsors are essential.
d. Documents must be distributed in a timely manner for workshops and meetings.
e. More support is required at the end of the project so that impetus is not lost.
f. The importance of broad-based stakeholder consultation is unquestionable.
g. Integration with technical and social issues is essential for

effective implementation of many technologies, especially those interfacing directly with consumers.

h. The strong environmental component indicates that environment should be a cross-cutter and not a separate sector in future foresight activities."

The major lessons learnt from one particular foresighting exercise, can be applied to similar exercises. The South African process highlighted how the use of foresighting and scenario planning can inform long-term planning in a developing country. It also highlighted some of the issues which will face developing nations who conduct this exercise including: commitment by the decision makers to the project, the need for a skilled labour force to implement the findings and funding to implement, adopting and utilizing the outcomes of the project.

The foresighting project in South Africa, which departed from the dominant paradigm of development used by many developing countries since the 1980s, has manifested many benefits to the country. An emerging question however is posed: Given similarities but in some cases structural differences among countries, how suitable this technique would be in resolving some of the problems faced by other developing countries, in particular in the Caribbean (tourist industry). As such the approach must be contextualized to reflect the unique factors that will impact the process within various Caribbean countries, specifically the cultures of governance and planning.

The Caribbean like South Africa faces similar problems with crime, HIV/AIDS, increasing inequity and poverty. Additionally the region has to contend with heightened occurrence of natural hazards and the resulting negative impacts on the environment.[8]

While there is consensus among governments of the region about the critical role played by tourism in the region's economic growth, the action required to effect the outcomes desired faces uncertainty. This uncertainty arises due to a number of factors, including divergence in priorities among the countries. What might be considered the immediate national imperative for one country might not be the same for another. This has been a major impediment to the establishing of other regional imperatives, e.g. the 'desired' CSM and CSME,

The importance of adopting this robust process of strategic planning is further supported by contemplating a number of plausible 'What if' scenarios which directly impact the regional industry. These include:

- What if the number of natural hazards increases in regularity and intensity?
- What if there was a terrorist attack on a cruise ship in the region?
- What if there was an oil spill in the region resulting from increase movement of cargo ships?
- What if a pollution tax is levied on air travel globally, resulting in increasing travel cost to tourists and operators of airlines?
- What if oil and wheat price increases persist, resulting in recessions in the economies of the targeted tourist markets as well as the regional economies?
- What if the oil price increases persist resulting in an acceleration in cruise ship and airline operation costs?

A number of other 'What If' scenarios could be highlighted. This shows the degree of uncertainty facing this crucial industry. The question which arises, however, is given that the potential causes of the shocks are endogenously determined, does the region employ an approach which is robust enough to anticipate and effectively prepare for the potential negative impact? Obviously the answer is no as forecasting continues to be the dominant technique applied to planning regionally despite its inadequacies.

CONCLUSION AND EMERGING CONCERNS

While the scenario planning and foresighting process is not a panacea, it presents a meaningful and effective process for risk management. Additionally it offers at least the same benefits of conventional forecasting and presents a more robust strategic planning methodology. It is important within the process, however, to comprehend how risk perception and communication will amplify or attenuate a potentially risky situation. To attenuate risk requires the building of trust and consensus in decision making, understanding the role of cultural theory and good governance practices. This demands a process which is dynamic, inclusive, multidisciplinary and stakeholder informed, not necessarily expert based as in conventional forecasting. Scenario planning and foresighting can generate the needed consensus on the vision forward and the necessary buy-in from the key stakeholders – offering a processual solution. However, issues of lack of trust, corruption, absence of institutional competence and capacity as well as infrastructural readiness can be constraining factors.

If the region is to adequately prepare for the risk associated with increasing shipping, intra- and extra-regional trade, as well as increasing visitor arrivals, these potential impediments must be adequately addressed and prepared for. With increasing unpredictable weather patterns, heightened intensity and regularity of natural disasters and escalating terrorist activities, proper preparation in anticipating or shaping the future is imperative. Scenario planning and foresighting offer an effective technique in preparing for the potential shocks associated with a more globalized reality – as the present and emerging future. The process anticipates shock factors and thus bolsters planning and preparation – accommodates uncertainty and minimizes risk and discontinuities. Essentially scenario planning and foresighting offer a process through which regional planners can anticipate and/or shape possible futures for sustainable tourism and regional sustainable development.

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NOTES

1 Sustainable tourism development is premised in the framework that Hayle, (2005) and Hayle and Harvey (2006) describe as the tourism system. The tourism system comprises of four areas: the generating market (the home of the visitors, which accounts for eighty per cent of expenditure in the system), the transit routes (passage of travel by land, sea and/or air), the destination (country and/or tourist resorts etc.), and the industry (the various categories of services offered – this accounts for twenty per cent of expenditure by the visitors).

2 See Linnerooth-Bayer et al., (2001). *Transboundary Risk Management* for details on transboundary risk management and case studies as to how the ideas emerged and were addressed. His case studies, however, reflect situations primarily affecting developed countries.

3 Weisacker et al. (1996) argue that we waste ten times as much as we actually use; 93% of materials we buy and consume never end up in saleable products at all; 80% of products are discarded after a single use; 99% of the original materials used in the production of or contained within the goods made in the US becomes waste within six weeks of sale.

4 Hayle (2005) points out that the tourism system comprises four areas: the transit route, industry, destination and the generating market.

5 Kirton (2003) notes that excepting for Belize and Guyana all other Caribbean countries are net importers of food, particularly from America.

6 It must be noted that a change in any of these factors does not have to be negative on the regional dynamic; as such the region must also be prepared to capitalize on opportunities which might arise. However, historically the negative impacts of these changes tend to be more prevalent.

7 Preservation of the natural environment is crucial to the sustainability of the industry given that the tourism product is inextricably linked to the natural environment.

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ANNEX I:

WTTC 2004 Regional League Tables: Comparative Data for GDP

Total for direct and indirect contributions to GDP

World rank	Country	All GDP (US$ million)
56	Puerto Rico	4,881.6
60	Dominican Republic	4,096.4
67	Cuba	3,490.6
72	Bahamas	2,986.8
74	Jamaica	2,647.8
95	Barbados	1,391.9
96	Aruba	1,305.8
98	Trinidad and Tobago	1,147.5
117	Antigua and Barbuda	635.8
143	Belize	221.0

Total for direct and indirect contributions to GDP as a percentage of all GDP

World rank	Country	Total D&I GDP as % total GDP
2	Antigua and Barbuda	82.1
7	Bahamas	56.0
8	Aruba	54.5
10	Barbados	52.2
13	Jamaica	36.0
25	Dominican Republic	25.5
30	Belize	23.5
53	Cuba	13.7
72	Trinidad and Tobago	10.8
153	Puerto Rico	5.3

Annualized growth projections to 2014: direct and indirect contributions to GDP as a percentage of total GDP

World rank	Country	Growth
38	Belize	5.6
39	Bahamas	5.6
93	Antigua and Barbuda	4.4
96	Barbados	4.4
97	Trinidad and Tobago	4.4
106	Puerto Rico	4.2
113	Jamaica	4.1
132	Cuba	3.6
153	Aruba	2.9
166	Dominican Republic	2.1

WTTC 2004 Regional League Tables:
Comparative Data for Employment

Total number of direct and indirect jobs

World rank	Country	Total direct & indirect jobs ('000)
36	Dominican Republic	772.2
54	Cuba	505.9
61	Jamaica	387.4
107	Bahamas	113.3
116	Puerto Rico	83.2
117	Barbados	82.4
129	Trinidad and Tobago	58.5
137	Aruba	39.4
144	Antigua and Barbuda	28.3
154	Belize	17.6

Total number of direct and indirect jobs as a percentage of total employment

World rank	Country	Total D&I jobs as % total jobs
1	Antigua and Barbuda	95.0
6	Bahamas	69.9
7	Aruba	69.0
9	Barbados	58.3
18	Jamaica	31.8
27	Belize	23.1
31	Dominican Republic	22.2
63	Cuba	11.8
71	Trinidad and Tobago	10.4
138	Puerto Rico	5.8

Annualized growth projections to 2014; direct and indirect jobs as a percentage of total employment

World rank	Country	Growth
12	Belize	4.8
19	Bahamas	4.4
34	Puerto Rico	3.9
52	Barbados	3.4
56	Jamaica	3.4
67	Trinidad and Tobago	3.2
89	Aruba	2.6
101	Cuba	2.4
120	Dominican Republic	1.9
137	Antigua and Barbuda	1.3

Book Review

Managing Sustainable Tourism: A Legacy for the Future

David L. Edgell, Sr., (Binghamton, New York: The Haworth Hospitality Press, The Haworth Press, Inc., 2006. ISBN 9780789027702)

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EDGELL starts this book by establishing a link between tourism and development and by highlighting the positive future prospects of the industry. According to him, tourism is a big business accounting for approximately 1 in every 12 workers globally and adding some $4.7 trillion to annual global output. He goes further and cites the World Travel and Tourism Council's (WTTC) projections indicating that the industry is expected to grow exponentially, generating $7.89 trillion by 2015 and providing 269 million jobs (p.5).

From very early in the text, Edgell makes the salient point that "the future of tourism depends on its development being in harmony with concerns for the environment and culture" (p.5). In ten chapters of accessible, reader friendly text, Edgell explores best practices of a wide cross-section of nature based, cultural and heritage tourism ventures found in mainland United States of America, Canada, South America (Ecuador and Panama) and the US Virgin Islands in the Caribbean. He explores goals, objectives, policies and strategies geared to achieve "protection, enrichment, and enhancement of the natural and built environments, resulting in economic prosperity and overall improvement of the quality of life of the local citizenry" (p.1). Through the skilful use of case studies, the author paints a graphic picture of some of the world's best nature based, cultural and heritage tourism offerings.

According to Edgell, sustainable tourism speaks to achieving and sustaining economic growth in a way that does not deplete the natural and built environment. The topic has become popular in contemporary tourism especially at a time when the natural environment is coming under serious pressures. Sustainable tourism for Edgell is about striking the balance between economics, culture and environmental protection. The book puts forward convincing arguments on how and why it is necessary to protect the environment, heritage sites and local culture while at the same time developing and articulating achievable goals to realize economic growth. While this would ordinarily be regarded as a very audacious move by any scholar, Edgell's years of exposure and experience in the field and discipline of tourism management makes him a good candidate to try.

The first of the ten chapters, 'Tourism Today and Tomorrow', provides an introduction, an overview of the chapters to follow and outlines the author's vision for sustainable tourism. The first case study – The U.S. Virgin Islands' Newest Sustainable Tourism Product: St. Croix Salt River Bay National Historical Park and Ecological Preserve – was used to lay a foundation for the discourse to follow. Chapter two titled 'A Philosophical Approach to Sustainable Tourism' drives home the point of the importance of sustainable tourism now and in the future and provides sound guidelines on the best practices for policy making. The second case study – Ecuador: The Wonderful World of the Galapagos Islands – further reinforces his arguments.

In chapter 3, Edgell departs from his rather idealistic posture on sustainable tourism and poses a question to the readers: 'Is Sustainable Tourism Economically Viable?' This chapter takes on a more pragmatic and business-driven approach to sustainable tourism focusing on market orientation and economic viability. The case study on Missouri, Big Cedar Lodge – The Epitome of Sustainable Tourism presented in this chapter was used to make the point that sustainable tourism could indeed be viable. Chapters 4 to 7 highlight the importance of nature based, cultural, heritage and rural tourism and the need to preserve these products so as to reap benefits and pass on the legacy to future generations. These four chapters with the infusion of case studies provide a rich description of diverse offerings from Panama and the United States. Next, chapter 8 presents useful and practical guidelines to achieve sustainable tourism. His integration of a case study on Kansas' Tall Grass Prairie National Preserve explicitly demonstrates the importance of cooperation at the local level for sustaining a viable tourism industry.

In some ways Edgell's book reads like a travelogue written by a strong believer in sustainable tourism. It presents little in the way of analysis and his vivid case studies provide a platform for his fairly transparent advocacy of his cause. It does however offer some useful prescriptions, based on the author's long experience and standing as a consultant, scholar and policy maker. Among the strategies outlined by Edgell to preserve the legacy of sustainable tourism are included careful planning and the use of best practices. In addition he stresses the assessment and development of many visitor attractions that have roots in the local community or complement local activities. He also identifies the need for good leadership at the community level to facilitate the sustainability of nature based, cultural and heritage tourism in rural communities. He argues for the preservation of the uniqueness of the environment and the need to capitalize on heritage sites, culture and natural resources while seeking to maintain their authenticity, thereby enriching their value to the visitors. He urges that the local community should seek to measure tourism development against environmental and social costs and benefits to the area and stresses the need to view sustainable tourism in terms of both long-term and short-term value to the community. Additionally, the intangible values, for instance quality of life should, be included in the overall measurement. Edgell also suggests that sustainable tourism must utilize contemporary technology (for example regularly updated websites to market the offerings and modern devices that can prevent waste of water and energy resources). He places strong emphasis on cooperation and "competition" which includes partnerships and strategic alliances between ostensible competitors. Edgell asserts that:

> The key to sustainable tourism is to manage the destination effectively within a given natural, built, or cultural environment to provide benefits to the local population, to enrich the visit of the tourist, and to preserve the tourism products for future generations to enjoy. Natural areas must be preserved and flora and fauna protected. Customs and traditions must not be discarded and privacy and dignity must be maintained. Ultimately, sustainable tourism, properly managed, will add to the quality of life of the residents, visitors, and tourism employees alike. It is important to develop strategies and guidelines to ensure that this happens (p.93).

Chapters 9 and 10, the last two chapters, end with the use of two case studies which highlight and support Edgell's vision that sustainable tourism can be achieved when it is managed properly through sound strategies and planning. Chapter 9 promotes the need to recognize and plan strategies to face the challenges that pervade sustainable tourism, which include erosion of the natural environment due to overuse; pollution; traffic congestion; friction and resentment between the host community and tourists; social problems including crime, drug abuse and prostitution; and overcrowding and damage to national shrines and historical structures. Additionally, Edgell asserts that local communities must be prepared for the costs involved to providing quality tourism benefits and gives a list of considerations. Edgell uses arguments found in Goeldner and Ritchie's, *Tourism: Principles, Practices and Philosophies* (2003)[1] to support his perspective that sustainable tourism needs a strategic plan.

One very important word of caution from Edgell is: "Don't get too crowded." He goes on to explain why – as "many problems arise when too many people live in or visit a fragile environment". The solution to this problem is to have "built-in parameters that signal early on that an area is beginning to reach its carrying capacity. Otherwise, it is likely the local population will no longer welcome visitors and tourists will no longer have a quality experience". He ends this chapter by prescribing that "managers of sustainable tourism development projects should seek to promote, establish, and implement a strategy and a program of concerted actions designed to ensure a balance between the visitors, the host population, and the environment so as not to exceed the carrying capacity" (p.108). In this regard Edgell stresses the role of government acting as the regulator and as the broker to bring partners together and elicit their input in the planning and management decisions.

Chapter 10 presents the principles of the systematic framework of Agenda 21 to encourage government and business to make the tourism industry more environmentally responsible. A crucial omission in this framework is the need for government to provide an environment which is safe, relatively free of crime and where the bureaucratic framework is flexible and conducive to business investment in sustainable tourism. Additionally, a recognition of the vulnerability of nature based tourism, culture tourism and heritage sites would be in order and as such governments would need to provide the necessary framework to manage the risks and challenges of man-made and natural disasters.

Perhaps another weakness of the book is its failure to zero in on the imponderables arising from the interaction between man and nature, which often resist the best efforts of planners and policy makers in particular countries or localities. The most cogent example is the phenomenon of global warming. This has led to an increased incidence of "un-natural disasters" such as hurricanes and tsunamis, drought (often attended by huge forest fires), unseasonal heat, the melting of polar ice caps and so on. These developments can be profoundly damaging to the tourism product, they are arguably more unpredictable, more damaging and more far-reaching than the traditional forces of nature and their control does not reside in the hands of any one country or government.

The book could also be said to underestimate the difficulty of advancing sustainable tourism in the face of the glamour and mass appeal of the “hi-rise”, high density tourism model. Investors may face severe challenges in terms of bureaucratic red tape, and access to capital as they seek to pursue their visions. This difficulty is illustrated by a case reported in the Jamaican newspapers,[2] in which a group of passionate environmentalists tell of their vision to develop and implement a concept that “would ensure visitors enjoyed the environment and its offerings without disturbing its natural habitat”. The implementation of this concept was not without obstacles as the entrepreneurs disclosed that “it was difficult to get financial institutions to buy into the dream”. One of the entrepreneurs in sharing his experience ruefully remarked that “trying to deal with financial institutions in this country and trying to bring this idea to them was ridiculously hard” and if “convincing investors was impossible, convincing banks was doubly impossible”. Having said all of this, however, Edgell must be complimented for producing a highly accessible and readable book. The text boasts a nice layout of chapters and navigating the book is facilitated by the judicious use of subheads and a reader friendly font type and size, all of which makes it good reading for even a layperson. The book also makes good reading for tourism stakeholders in academia, government, and business. While not particularly scholarly in orientation, the practical strategies and prescriptions for managing sustainable tourism for the 21st century and beyond were very insightful and useful. The thesis of the book is forthright and unambiguous and there is no mistaking the author’s passion for sustainable tourism. His experience and exposure as an academic and a bureaucrat in the discipline and practice of tourism as well as his use of case studies provide good enough foundation for a book which is at once credible, informative and entertaining.

NOTES

1. **Charles R. Goeldner & J.R. Brent Ritchie,** *Tourism: Principles, Practices, Philosophies*, **9th ed. (NJ: Wiley, 2003).**
2. **Ingrid Brown (Senior Staff Reporter), Island’s newest tourist attraction opens in Ocho Rios,** *Jamaica Observer* **(Wednesday, July 23, 2008).**

Book Review

Tourism and HIV/AIDS in Jamaica and The Bahamas

by Ian Boxill, *with* Kerry-Ann Lewis, Rosemarie Frey, Paul Martin, Denise Treasure, Wayne Bowen and Taromi Joseph

(Kingston, Jamaica: Arawak publications, 2005. ISBN 9789768189646)

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THE book *Tourism and HIV/AIDS in Jamaica and The Bahamas* could not have been written at a better time in Caribbean history and development. There have been significant developments in both HIV/AIDS and tourism at the Caribbean level. At the end of 2007 for example, an estimated 230,000 people were living with HIV and AIDS in the Caribbean. Some 17,000 people were newly infected during 2007, and there were 11,000 deaths due to AIDS.[1] The Caribbean tourism sector continued to hold its own in 2005 based upon the available returns from its 31 member countries. The Caribbean Tourism Organization (CTO) estimated that tourist (stay-over) arrivals to the region increased by 3.6 per cent to reach 22.5 million in 2005 (CTO 2005)[2] and there were projections for increase on an annual basis. Sex tourism has now been recognised as a part of the Caribbean tourist package. Therefore, any research on tourism and HIV/AIDS is timely.

The book represents cutting edge research pioneered by one of the Caribbean's leading writers on tourism, Ian Boxill. The book explores two issues that have been a part of regional academic, political and social discourse, at least at the discussion level, and is revolutionary in its provision of empirical data on tourism and HIV/AIDS that cuts across national borders. The issue of Caribbean tourism is topical from the perspective of its viability and sustainability within the different territories as well as at the level of CARICOM. HIV/AIDS, on the other hand, represents a potential threat to Caribbean development and could have serious implications for important sectors, including the tourism sector. Boxill et al. carry out an important examination of these issues by moving away from the speculative discussions and passive interpretations of related events and activities into close examination of the "sexual attitudes and behaviours of tourists and their patrons in socially condoned marginal" (p.i) activities.

The book is relevant as an academic and scholarly piece of work that can also be read for leisure by individuals across many disciplines. The language is not of the static, complicated style that is usually characteristic of most academic work, but is simple and interesting. The espousal of the Caribbean vernacular in dialogue not only attracts a Caribbean audience, but will also cater to an international readership that has an interest in the Caribbean cultural experiences. While it can be argued that this simplicity in language takes away from the academic aptness of the book, it leverages itself on the potential for a wider level of readership and greater significance to a wider cross section of people.

The structure of Boxill's book complements the simplicity of the language employed, thus again allowing for an easy read. The book is divided into small sections. However, the four major parts comprise 'Overview of the Study', 'Research on Tourism and HIV/AIDS', 'Results', 'Conclusions and Recommendations'. Other important sections included in the book are 'Government Response', 'Proposals', 'Conclusion and Recommendations'. The 'Overview' appropriately puts into context the entire text. It creates the link between tourism and HIV/AIDS and provides credible justification for the study. Under 'Research on Tourism' five objectives are outlined that serve as a guide to the research and give a detailed exploration of the methodology used in the text. The section 'Results' encapsulates the findings while 'Conclusion and Recommendations' offers pertinent suggestions on curtailing the spread of HIV/AIDS, particularly in light of a fragile tourism sector. It is important to note that one of the most striking features in this book is the presentation of the findings. Boxill's findings are excerpts taken from the interviews conducted for the research. For the most part, the material in the book is presented without manipulation of the data obtained, allowing the reader to interpret the data without coercion.

The book presents a useful situation analysis of the relationship between HIV/AIDS and tourism in both Jamaica and The Bahamas from the perspective of individuals in the tourist industry who would have been more aware of the risks factors that link the two variables. This situation analysis covers issues such as the sex industry, local perceptions, the perceived sources of HIV, issues of gender and age, social class and drug use and HIV. This information spans the two Caribbean cases identified even though there seems not to be a deliberate effort to compare and /or contrast. The scope of the book widens to explore other issues such as coping strategies, the extent of the HIV problem, and Government programmes and response. The book is able to deal with all of these issues without losing sight of its five core objectives and without depreciating in academic relevance and/or quality.

The writers have to be credited for meeting the stated objectives of the book. In reading the text, it becomes evident that this was a priority concern, and Boxill's prowess as a writer and scholar was clearly evident in addressing it. The unique writing style employed throughout the text is also quintessentially Boxill's. This is evident in some of his earlier works and is a distinctive feature that most of his readers can identify with.

The research however was not grounded in any existing theory and the writers missed a chance to create one of their own by not doing a thorough analysis of the information garnered, or putting forward hypotheses of expected outcomes. The issues are explored from the perspective of the participants in the survey and this makes reading the book an exciting affair. The readers are left to deduce which of the many perspective is the most appropriate, or better yet, to which perspective do the writers subscribe.

There is also an issue with transition and sequencing. The Introduction for example is a bit displaced and offers little added value to the text. Except for the last paragraph, it could have been merged into the overview or into the first section of the body of the text. This however does not take away from the general good quality of the recordings and it is only distracting in so far as it takes away some of the fluency that would further enhance the quality of the book. After reading the Introduction, however, one is left with a desire to continue reading, if only to discover if the writers' pronouncement that the research is "the first of its kind" is a testament of its newness, or is just rhetoric.

The major disappointment with the book is that it was unable to create this empirical link between HIV/AIDS and tourism and could only establish a relationship "by way of inference" (p.57). The nature of true research, however, dictates that this is perhaps a reflection of the validity of the research rather than a limitation. Readers would have been satisfied that the book has established a connection and by doing so has created avenues for further research. At the end the author hints that what is needed is acute awareness on the part of Caribbean individuals and organisations rather than a superficial level of consciousness about issues pertaining to HIV/AIDS and tourism. There is clearly scope for further research on these issues, and Boxill et al. were careful to indicate this.

In conclusion, *Tourism and HIV/AIDS in Jamaica and The Bahamas* is an important book that should be required reading for all individuals with an academic interest in tourism from a Caribbean perspective. It is also a useful travel companion particularly for persons visiting the region for the first time. It opens up new avenues for continued research and enquiry into the issue of the relationship between HIV/AIDS and tourism. Hopefully it can become a resource for policy development in Caribbean tourism with a view to better understanding the relationship between tourism and HIV/AIDS.

NOTES

1. "An Overview of AIDS in the Caribbean." http//www.avert.org/aids-caribbean.htm
2. Caribbean Tourism Organization, Official website. http://www.onecaribbean.org/