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High Commissioner



### **MESSAGE FROM HIGH COMMISSIONER OF INDIA, KINGSTON**

*I would like to take this opportunity to thank members of the Jamaica Tourism Industry for their stellar roles in making Jamaica one of the most attractive tourism destinations of the world. After observing this industry for a while, I can appreciate the commitment and hard work emanating from this industry with special consideration for the interesting tourism product offerings, especially by the hospitality sector. All major players in Government and private sectors have been doing an incredible job and I trust that their efforts will further improve as the industry flourishes with new additions to investments and resources. Jamaica's long track record of offering unique tourism products sets this island apart from other destinations in the Caribbean offering sand, sun and sea. With its ever-green hill-tops and pristine mountain ranges, it would be only apt if we call Jamaica, the "Emerald of the Caribbean".*

*My efforts as the High Commissioner of India has always been to increase bilateral cooperation in all areas. Recently, I have had the privilege to meet and share ideas with various stakeholders such as the Minister of Tourism, Hon. Edmond Bartlett and other members of the industry to personally understand specific needs and requirements. By doing so, I have been able to identify several factors which could be implemented to facilitate the growth of the industry and forge closer ties between the cultures and customs of these two friendly countries.*

*My mandate is to enhance efficiency, productivity and strength in bilateral relations, as we seek to improve well-being of our people.*

## **PREFACE**

The tourism industry in Jamaica comprises of many arms, which include: hospitality, culinary, tours, gastronomy, and tailor-made products and services. The location of Jamaica is central in the Caribbean, and endowed with many natural resources. The cultural richness of this land is evident from its fame as the birth place of internationally acclaimed Reggae music with rich contributions from the local icons: Bob Marley and the Wailers, Jimmy Cliff, Beres Hammond, Morgan Heritage, Buju Banton, Third World, to name a few. The world's fastest man, Usain Bolt also has been the pride and the living legend of Jamaica. With her green hills, picturesque mountain tops, clean beaches, and very healthy alkaline-rich water sources, the Island can ideally be considered as an ideal location for rejuvenating the spirits and boosting up physical energy for any visitor of any age group.

Jamaica has recorded earnings of over US \$3 billion in tourism for the period January through December 2017 and US\$ 3.3 billion in 2018. Over 4.3 million tourists visited Jamaica in 2017, and 4.5 million in 2018. Jamaica's tourism products are unique and next to none with geographical richness of 120 rivers and the World heritage site of Blue Mountain ranges, which has a height of 7,402 ft. This nation also has a wide array of culinary attractions such as the national dish - ackee and salt fish- jerk chicken, and various patties. Connoisseurs have many choices viz. Italian, French, Mediterranean, Asian, Indian and more to satisfy his palate.

Tourist arrivals have increased over 10% in 2017 compared to 2016 and the surge continued in 2018 too. Most of Jamaica's tourist arrivals are from Europe, North and South America mainly via cruise ship and other stop over arrivals.

This report presents an overview of the Jamaican Tourism Industry, an assessment of the current tourist partners and their contribution towards the sector. To identify areas where Jamaica can make its Tourism market more favourable for potential Indian investors and for the entry of additional players as the industry aims to achieve its new targets in meeting the demands of the visitors.

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## **OBJECTIVE:**

- To provide an understanding of Jamaica's tourism industry.
- To explore Jamaica's tourism market and highlight its potential for growth.
- To explain Jamaica as a 'brand' and potential investment opportunities.
- To identify total Indian population within Jamaica and how well Jamaica's tourism industry is able to facilitate Indians and investments from India.
- To highlight Jamaica's main tourism partners and opportunities for India to have access to Jamaica's tourism market.

## **PURPOSE OF THE REPORT:**

This report is aimed at presenting an overview of Jamaica's Tourism Industry to all interested parties including the Government of India. Jamaica as a country and as a brand has made an indelible mark on the world. Jamaica's rich culture of vibrant music, dance, cuisine, folklore and sports create pride and love and invite many visitors to the island year after year. Jamaica is one of the world's most sought-after tropical tourist destinations. Therefore, it is envisioned that for Jamaica to maintain its significance in the global tourism market, there is a need to establish new partnerships that would lay the foundation for improved service delivery, gain access to new markets and attract more visitors to the island. Hence, the reason to establish a strong bilateral relationship with India and thus unearth new opportunities to benefit both the countries.

## **BACKGROUND TO JAMAICA'S TOURISM INDUSTRY:**

Jamaica's tourism industry began in the 1800s with the establishment of the 100 room Constant Spring Hotel, which was built in 1888. However, Jamaica's tourism industry officially started with the International Exhibition of 1891. The International Exhibition was an initiative by Sir Henry Blake, a former Governor of Jamaica. Sir Henry Blake wanted to provide a facility for visitors to be housed when they arrived on the island. He stated that "the only accommodation for travellers was the hospitality freely offered by the country gentlemen to those who were fortunate enough to obtain introductions". An increased need for adequate accommodations for the inflow of persons who visited the island to attend the exhibition. The Jamaica Hotel Law was passed in 1890 to encourage the construction of hotels in the country. In the meantime, the Government of Jamaica also took greater initiatives to develop the island's tourism sector.

With the assistance from the Governments of the United States and Britain and implementation of the Hotels Aids legislation in 1904 Jamaica was able to adequately develop its tourism industry. The Hotels Aids legislation stipulates that any person erecting a hotel with forty (40) or more bedrooms would be eligible to import materials into the island, duty free. The Hotels Aids Act exempted entrepreneurs from increased taxation for initial ten years from the date of the import licence. Moreover, during the 1970s and 1980s, many of the hotels on the island were owned and operated by foreigners. However, the hotels and resorts owned by foreigners were taken over by Jamaicans who rebranded and restructured those resorts to have a Jamaican feel and atmosphere that included Jamaican cuisine and music. This gave rise to what is referred today in Jamaica as the all-inclusive resort concept. In addition, in 1949, Abe Issa opened the world-renowned Tower Isle Hotel. In 1978, Abe Issa pioneered the all-inclusive concept for couples with the establishment of the Couple's Resort Jamaica. To date a number of all-inclusive resorts are in operation and are owned and operated by Jamaicans as well as international investors.

Tourism is one of the world's fastest growing industries and an important source of foreign exchange and employment for many developing countries and is a part of the Jamaican Government's mandate to have additional investments

in Jamaica's tourism market. Accordingly, the government implemented the policy Shovel Ready Investment Programme (SRIP). The Shovel Ready Investment Programme was a strategy employed by the government to have key areas for growth in the Jamaican economy. The programme included some of Jamaica's choice of real estate appropriate for tourism development. Investments are fast-tracked through the development approval process to facilitate quick implementation of the project.

There are a number of areas in which individuals may be able to invest in Jamaica's tourism sector. These areas range from that of 'all-inclusive resorts to that of acquisition and refurbishing of distress properties' (JAMPRO, 2017). To develop man-made attractions and the creation of wellness and health tourism. Jamaica's tropical climate facilitates Jamaica's development into a sought-after destination. Jamaica has a vastly growing tourism industry. The country has entertained visitors from all over the world, over the years. Tourists are mainly coming from North America, South America and the Asia Pacific. Jamaica's tourism sector contributes an estimated 4 percent to the country's economy. Hence, it is one of the important sectors which is capable of stimulating economic growth and stability.

The tourism sector is expected to grow at a rate in excess of 5 percent by 2020. Jamaica is one of the world's strongest country brands. Jamaica's exploits are in areas of sport, culture, music and cuisine. These features have impacted the lives of many individuals around the world. The impact has been great which has influenced individuals to visit the island and to bask in its natural resources. Jamaica's tourism sector offers a number of products that caters to the needs of the clients from diverse backgrounds.

## **REGULATORY FRAMEWORK FOR JAMAICA'S TOURISM SECTOR**

### **The Tourist Board Act, 1955**

The Tourist Board Act was established in 1955 and was last amended in 1999. This piece of legislation was used to institute a Tourist board having responsibility for developing the tourist industry of Jamaica and to promote efficiency.

### **The Travel Agency Act, 1956**

The Travel Agency Act was established on 29 September, 2017. It stipulates that all travel agencies operating in Jamaica must be registered. A travel agency is an establishment that carries on the business of arranging a request on behalf of persons proposing to travel from Jamaica.

### **The Travel Tax Act, 1963**

The Travel Tax Act was established in 1963. This legislation stipulates that this tax shall be paid by each traveller on each occasion on which such traveller leaves Jamaica for any place outside Jamaica, a tax of a sum as may from time to time be prescribed and different sums may be prescribed in respect of different categories of the traveller.

### **The Natural Resource Conservation Act, 1991**

The Natural Resource Conservation Act was established on July 5, 1991. This piece of legislation established the Natural Resource Conservation Authority of Jamaica to regulate and to take the necessary steps for the effective management of the physical environment of Jamaica. To ensure the protection, conservation and proper use of its natural resources. The Natural Resource and Conservation Act was also implemented to promote public awareness of ecological systems.

### **The Transport Authority Act, 1987**

The Transport Authority Act was established on July 8, 1987. This piece of legislation was used to implement the Jamaica Transport Authority, having responsibility to maintain and regulate the country's transportation sector.

### **The Resort (Cottages) Incentive Act 1971**

The Resort (Cottages) Incentives was established on November 4, 1971. This act provides relief from income taxes and custom duty in aid of the resort cottages and for purposes incidental or connected with the foregoing purposes.

## **The Airport Authority Act / Airport (Economic Regulation) Act 2002.**

This Act makes provision for the introduction of an Airport Improvement Fee (AIF) which was implemented in 15 February, 2003. The proceeds from the fee are placed into a separate airport expansion. The Airport Authority Act provides for the economic regulation of international airports by the Jamaica Civil Aviation authority which is responsible for the setting of aeronautical charges under the Act.

## **The Beach Control Act, 1956**

The Beach Control Act was established on June 1, 1956. The Beach Control Act regulates activities concerning the sea and the overlying water, the foreshore and beaches of Jamaica. The Beach Control Act establishes the Beach Control Authority for the purpose of controlling and regulating the use of the sea, the overlying water and of the foreshores and beaches of Jamaica in the interest of the public and persons who have acquired rights therein as well as for the purposes incidental to or connected with the matter aforesaid.

## **The Casino Gaming Act, 2010**

The Casino Gaming Act was established June 3, 2010. This piece of legislation ensures the regulation and control of all casino gaming activities in Jamaica.

## **The Hotelkeeper's Liability Act, 1950**

The House Keeper's Liability Act stipulates that no hotelkeeper is to be liable to make good to any guest of such hotel keepers any loss of or injury to goods or property brought to a hotel, not being horse or other live animal or any gear appealingly thereto, or any carriage to a greater amount.

## **The Noise Abatement Act, 1997**

The Noise Abatement Act was established on 26 March, 1997. This piece of legislation is used to regulate and control the noise level caused by amplified sound and other specified equipment within the environment.



## **REASONS TO INVEST IN JAMAICA'S TOURISM SECTOR**

1. Jamaica's tourism sector has been growing consistently at 4 percent per annum and is expected to increase to 5 percent by 2020.
2. Growth in the industry has been fuelled by Jamaica's achievements in sports, music and the reach of its cuisine on a global level; which has enabled Jamaica to excel as a brand.
3. Jamaica has made improvements in the accommodation sub-sector of the tourism industry which continues to generate very high interest with international investors from Spain, Mexico, USA, Canada, Colombia and other countries. There are a projected 13,694 hotel rooms that are expected to be added by 2020.
4. New development opportunities include the recent implementation of the **casino** and timeshare legislation. This will ultimately provide opportunities for resorts to integrate this sort of development into their product offerings.
5. Jamaica offers a very rich heritage and culture which dates back to the 17<sup>th</sup> century. This culture can be explored by visiting the many caves, ruins, artifacts, and churches on the island left behind by the Taino Indians who are said to be Jamaica's first inhabitants. There are also bike trails, canopy tours, hiking to the famous Blue mountains, annual marathons, Jamaica's extensive cuisine fused with various other cultural mixes as well as several annual musical festivals and events.
6. Jamaica's tourism industry offers an extensive range of products catering for tourists on a shoe-string budget as well as for those seeking an extravagant experience. The hotel options range from super all-inclusive to boutiques and bed and breakfast.
7. Opportunities to invest in Jamaica's tourism market extends beyond building rooms as there are many opportunities for tourism attractions and other business linkages to include entertainment, restaurants, agriculture, manufacturing and services. Recent investments in the sector, includes the improvement and upgrading of Chukka Blue, Dolphin Cove and Mystic Mountain.
8. Jamaica has available prime commercial properties for greenfield projects which are ideally suited for hotel development. These properties are located along the coastal areas of the island such as the northern, southern, eastern and western points of the country in order to exploit the islands beautiful white sand beaches.

9. The Government has implemented the Shovel Ready Investment Programme (SRIP) which is primarily geared at acknowledging Jamaica's tourism sector as a key area of growth for the economy. SRIP includes some of Jamaica's choice real estate suitable for tourism development. Essentially, this program investments are accelerated through the development approval process to facilitate quick implementation of projects.
10. Investment opportunities in the sector includes all-inclusive resorts, high-end boutique developments, bed & breakfast, villas, mixed-use developments, acquisition and refurbishing of distressed properties the development of natural and manmade attractions and the acquisition and development of existing attractions, night life options, health and wellness tourism facilities such as hospitals, dental practices, spas and more.
11. The Jamaican Government is committed to the tourism industry and as such has a long history of support which enables the growth and enhancement of the sector. This commitment can be seen through the resources devoted to training personnel for the sector, the development of the Tourism Enhancement Fund (TEF) which provides funds for beautification and strengthening of the tourism product as well as advertising.
12. The Government has also enabled incentives for persons interested in investing in the sector. Incentives include benefits from the Omnibus Incentives Act which helps to create a framework for companies operating in Jamaica to benefit from duty-free importation of raw materials for construction employee tax credits, reduced corporate income tax and other fiscal benefits.
13. After an investor has gone ahead and completed the construction of a hotel there are additional benefits to be gained through the Productive Inputs Relief (PIR) system. The PIR system provides investors with duty-free importation of items where the items are for productive use only and serves to benefit hotels & resort cottages, tourism attractions and the healthcare sector.
14. Investing in Jamaica's tourism sector has long-term benefits. Jamaica is recognized as a 'brand destination' and has been profitable to its investors over the years. The Government is committed to the growth and success of the sector and with Jamaica's strategic location and great access to

major gateways investors can expect to enjoy favourable occupancy levels and average daily rates (ADR's) over the duration of their investments.

15. Once there is interest from an investor to invest in Jamaica's tourism product contact should be made directly to Jamaica Promotions Corporation (JAMPRO), Jamaica's economic development agency, responsible for assisting investors from the early stages of research to the last stages of implementation.

## **SUSTAINABLE TOURISM DEVELOPMENT**

The world has created the need to facilitate the continuation and sustenance of tourism to create a product that will continue to be in demand for years. Tourism is a tool of integration and it helps to maintain relations with countries at the regional and global levels. This product is used by many developing countries to promote economic growth and stability.

Tourism is a globalised product that transcends borders. Accordingly, in 2002 Jamaica developed a tourism sustainable development master plan which has been geared for achieving sustainable development. The objective of the 'master plan' is to ensure Jamaica's economy maintained sustained growth resulting from the contribution of earnings from an increase in the number of tourist arrivals to the island.

The World Tourism Organization explains that sustainable tourism development requires the participation of all relevant stakeholders and guidance of strong political leadership to ensure wider participation and consensus building. To achieve sustainable development the World Tourism Organization has suggested following strategies: -

- Minimize negative social, environmental and economic impacts
- Generate greater economic benefits for local people and enhance the well-being of host communities.
- Involve local communities/people in the decision making
- Provide more enjoyable experiences for tourists through meaningful connections with local people and a greater understanding of local cultural, social and environmental issues.

## **JAMAICA'S MAIN TOURIST PARTNERS AND MAJOR PLAYERS**

The Ministry of Tourism in Jamaica was established to help build and promote 'Brand Jamaica' internationally and locally. Envisioning Jamaica to be a world class tourist destination enjoyable for domestic, regional and international visitors alike. These interactions and exchanges, thus contributing to an improved quality of life for all. The vision of the mission is "to work with our partners in the establishment and implementation of policies, programmes and systems, the promotion of activities and the creation of products and services that contribute to sustainable growth and development in Jamaica through Tourism."

Jamaica has been working with several partners over the years that are directly linked to the Ministry of Tourism. Through these partnerships all are contributing to the overall success of the industry. Leading partners are: -

### **Jamaica Trade and Invest (JTI) JAMPRO**

The Jamaica Trade and Invest (JAMPRO) is an agency of the Government of the Ministry of Economic Growth and Job Creation. The purpose of this agency is to promote business opportunities for export and investment to local and international public and private sector organizations. JAMPRO is the representative agency responsible for facilitating the implementation of investment and export projects. JAMPRO is the key policy advocate and advisor to the Government as it pertains to the improvement of Jamaica's business environment and the development of new industries.

### **Jamaica Hotel & Tourist Association**

This organization represents Jamaican hotels, other types of visitor accommodations and suppliers of goods and services to the tourism industry. Suppliers to the tourism industry are commonly known as "Allied members". The Jamaica Hotel & Tourist Association has been established since 1961 and seeks to promote the development of Jamaica's tourism industry by representing all its members locally, regionally and internationally. By extension the Jamaica Hotel and Tourist Association is affiliated with various government bodies throughout the Caribbean and as such is recognized as one of the leading associations of its kind in the Caribbean.

## **Caribbean Hotel Association**

The Caribbean Hotel Association is an online source for information related to travel to the Caribbean. This association uses an online magazine format which aims at promoting the best of the Caribbean, such as hotels, tips and suggestions that maybe useful for first time travellers to the Caribbean. The information presented on the site is updated regularly with new information added daily.

## **Caribbean Tourism Organisation**

The Caribbean Tourism Organisation is comprised of members from over 30 countries and territories. The Barbados based company has members based in Dutch, English, French territories and includes members from the private sector allied members. The main agenda of the Caribbean Tourism Organisation is to provide through its members the services and information necessary for sustainable tourism development for the economic and social benefit of the Caribbean people.

## **World Travel and Tourism Council**

The World Travel & Tourism Council (WTTC) is a global organisation that seeks to bring all of the major players together who are involved in the Travel & Tourism sector. The WTTC by extension allows them to speak with one voice to governments and various international bodies when necessary. The primary objective of the WTTC is to raise awareness about travel and tourism as one of the world's largest economic sectors. Therefore, supporting 292 million jobs and generating 10.2% of the world global GDP.

## **World Tourism Organization (UNWTO)**

The World Tourism Organization (UNWTO) is the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism. It promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide.

## **TOURIST ARRIVALS**

According to the World Trade Organization (UNWTO) 2015 was the sixth consecutive year of above-average growth in tourist arrivals. It was reported that

international tourist arrivals grew by 4.4 percent in 2015 to 1.184 million tourists. With Jamaica's main markets being Europe, North and South America and Asia, Jamaica received total stopover arrivals of 2,123,042 increasing by 2.1 percent with a breakdown of foreign nationals recording 1,973,217 (a 2.3 percentage increase) and non-resident Jamaicans recording 149,825 (a 0.6 percentage decrease), while cruise ship arrivals recorded 1,568,702 million (a 10.2 percentage increase).

#### **Total Tourist arrivals to Jamaica**

<b>Year</b>	<b>Stopover Passengers</b>	<b>Cruise</b>	<b>Total</b>
2002	1,266,366.00	866,226.00	2,132,592.00
2003	1,350,285.00	1,133,411.00	2,483,696.00
2004	1,414,786.00	1,102,510.00	2,517,296.00
2005	1,478,663.00	1,137,250.00	2,615,913.00
2006	1,678,905.00	1,337,993.00	3,016,898.00
2007	1,700,785.00	1,180,733.00	2,881,518.00
2008	1,767,271.00	1,093,273.00	2,860,544.00
2009	1,831,097.00	923,234.00	2,754,331.00
2010	1,921,678.00	909,976.00	

			2,831,654.00
2011	1,951,752.00	1,127,012.00	3,078,764.00
2012	1,986,085.00	1,320,547.00	3,306,632.00
2013	2,008,409.00	1,265,693.00	3,274,102.00
2014	2,080,181.00	1,424,047.00	3,504,228.00
2015	2,123,042.00	1,569,342.00	3,692,384.00
2016	2,181,684.00	1,656,151.00	3,837,835.00
2017	2,352,915.00	1,923,274.00	4,276,189.00
2018	2,370,500.00	1,939,500.00	4,310,000.00

*Source: Jamaica Tourist Board (Figures for 2018 are preliminary and may be adjusted after further review)*

## **CURRENT INDIAN POPULATION IN JAMAICA**

Currently, the Indian population living in Jamaica is recorded at 81,500 which amounts for 3% of the overall population of 2.7 million. Indians first arrived in Jamaica in 1845 shortly after the slave trade ended. Indians came in search of work as indentured workers mostly on the sugar cane plantations and since then the Indian-Jamaican culture was established.

There is a strong presence of Indian culture in Jamaica and as such Indian cuisines has been adapted into Jamaica's culture. Dishes such as traditional

Indian foods for example goat curry, rice, roti and callaloo (a type of spinach) dishes have become a part of the national cuisine.

### Stop Over Arrivals by country of residence 2011-2017

Stop over Arrivals by country of Residence and year							
Countries	2011	2012	2013	2014	2015	2016	2017
<i>India</i>	<i>1,330</i>	<i>1,375</i>	<i>1,567</i>	<i>1,983</i>	<i>1,833</i>	<i>1,721</i>	<i>1,834</i>
Japan	2,027	2,092	2,177	2,022	2,163	1,841	1,849
China	1,703	2,102	2,420	2,645	3,744	3,899	3,892
African Countries	1,200	1,651	1,370	1,447	1,520	1,536	1,530
Australia	2,040	2,254	2,462	2,513	2,999	2,692	2,574

Source: Jamaica Tourist Board

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### INCREASING INDIAN TOURIST ARRIVALS IN JAMAICA

The Indian tourist numbers are expected to increase to 50 million from 15 million by 2020. According to “The Hindu” a majority of outbound travellers, approximately 67 percent are from Western India mostly from Gujarat and Maharashtra. Therefore, Indians travelling to western hemisphere could easily add Jamaica as one of their choice destinations. Jamaica’s pollution free tropical



climate makes it ideal for seekers of sand, sun and sea. Jamaica is an inviting place for Indians as they get their visas on arrival, without going through visa procedures before travelling to Jamaica.

The tourism products offered in Jamaica are many as various parts of the island offer diverse versions of Jamaican experience. There are four major tourism centres in the island - Negril, Montego Bay, Ocho Rios and Kingston. Negril, Westmoreland is for quintessential “casual, lowkey kind of vibe”. Montego Bay is the island’s second city and is considered the tourist capital of the island. Ocho Rios, St. Ann, is dubbed the garden parish and is the “nature lover’s escape” sporting the most famous attractions such as Dunn’s River Falls and is the birth parish of the iconic Bob Marley. Kingston is the island’s capital and is often referred to as “the heartbeat of Jamaica” and is considered the business and cultural capital of the Caribbean.

Jamaica has many tourism products to offer to Indians with her many similarities to Indian culture like traditional cuisine, music and cultural components. Jamaica is the ideal location for Indian nationals who would like to spend a couple weeks in a Caribbean island during their annual vacations. “Out of many One People” is the slogan of Jamaica and one can really find “Unity in Diversity” everywhere in Jamaican life-style and Culture.

Currently, Jamaica has several Spanish owned hotels operating locally for many decades like RIU, Grand Palladium, Iberostar, to name a few. The Government of Jamaica is seeking to develop this sector further by seeking new investments and tourism from Asian and African countries. Jamaica mostly receives tourists from Europe, North America and South America and as hence is seeking to diversify her market.

In the year 2015 Jamaica recorded an average Hotel Room percentage occupancy rate of 75.8% for all -inclusive hotels. While for non-all- inclusive hotels the average room occupancy rates were measured at 45.3%. In 2015 the overall average length of stay for foreign nationals was 8.8 nights; compared to 8.7 nights recorded in 2014. While foreigners who used hotel, accommodation had an average length of stay of 6.9 nights and those who stayed in non-hotel accommodation stayed 13.8 nights. This suggest that the Jamaican market has much room for growth as the Tourism Minister is trying to increase the current

tourist arrival levels. Jamaica is known as the pearl of the Caribbean and offers a tourism product like no other place on earth. Jamaica was also recently ranked third coolest nation among the CNN 14 coolest nations. The island has very low air pollutant levels and would prove beneficial to those visiting, seeking a refreshing and captivating experience.

In an effort to increase tourist visits from India to Jamaica and vice versa, greater people to people and government to government contacts need to be established and developed. Cooperation between Indian Tourism Development Corporation and Jamaica Tourist Board can play major role in this effort by streamlining of major travel agencies in India such as: Cox and kings, Thomas Cook, SOTC, Kesari, Club Mahindra Holiday etc. just to name a few. This strategy could considerably boost tourism in both the countries. Jamaicans are already enjoying India visa facility on 'gratis' basis. If some affordable tour-packages are developed many Jamaican will be encouraged to travel to India.

### **JAMAICA'S POTENTIAL FOR EXPECTED GROWTH IN THE SECTOR**

Jamaica is currently expected to experience an increase in tourist arrivals. For the period January-March 2018 Jamaica recorded earning of over US \$1 billion dollars. The Minister of Tourism Edmond Bartlett has indicated that the recent earnings account for 1,298,674 visitors to the island to include 625,002 stopover arrivals and 673,672 from cruise ships.

Minister Bartlett explained that the current earnings in tourism reflected a 6.6 per cent increase over the same period last year in 2017. The overall increase showed a combined 13.3 per cent increase for both cruise ship and stopover earnings when compared to the same period of January- April 2016. The Jamaican tourist market is open for investment as the country has benefited from both traditional and leisure segments of tourism. The Jamaican tourism market includes boutique and city attraction with health and wellness options for guests. Therefore, the following opportunities are open to investors locally and internationally who are considering investing in the Jamaican market.

#### **Opportunities include:**

- **Boutique Hotels** which are ideally developed offering a highly personalized service to its guests. Select properties such as

Strawberry Hills located in the famous Blue mountains and the Caves in Negril both offer a distinctive experience.

- **Large-scale Hotels** offers more of a globally competitive branding, Jamaica provides investors with the opportunity for lucrative greenfield developments.
- **Entertainment and Sports Tourism** is a large make-up of the Jamaican tourism sector. Jamaica hosts several food, music and sporting festivals each year that have become world famous as tourists return year after year to indulge in these festivities. A few of these events are: Reggae Sumfest, Rebel Salute, Jamaica International Invitational Meet and the ISSA Boys & Girls Championships among many others.
- **Eco-tourism attractions and resorts** is a large part of the Jamaican tourism product. Due to Jamaica's lavish biological diversity, investment opportunities such as attractions with soft adventure, hiking trails and zip-line rides are welcomed.
- **City Hotels**, Kingston is the hub for business in Jamaica and second is Montego Bay the second city. The Montego Bay Convention Centre has been responsible for much of the growth and traffic to Jamaica serving as a primary convention center for various expositions, seminars and business functions. This helps to highlight the need for business hotels as the need for variety is on an increase.
- **Medical Tourism**, with Jamaica's favorable geographic location and close proximity to the US the island is poised to capture a share of the global health and wellness tourism sector valued at over US\$600 billion as it attracts value-added investments. Jamaica has the capabilities to host diagnostic facilities, general hospital facilities and specialized facilities to cater to medical tourist.
- **Wellness Tourism:** Jamaica is known for an abundance of herbs, natural medicines and healing springs paired with its already very appealing backdrop for renewal and relaxation. The island stands to gain from further investments in this area as well as the possibly for a tourism sub-sector into retirement homes and spas are very likely.
- **Casino Gaming Regulations** are a huge part of the Casino Gaming Act which was passed by the Jamaican Government in 2010. The Act served to introduce casino gambling on the island as part of the

approved integrated resort development. The regulations were since amended.

- **Timeshare legislation** in Jamaica was recently operationalized in May 2016 to allow the development of timeshare properties in Jamaica. This legislation will highlight Jamaica as one of the newest destinations for timeshare opportunities with the Caribbean.

## **SWOT ANALYSIS**

### **Strengths**

- 3,837,835 tourist arrivals in 2016 and a 13.6 percent increase for the period January-April 2016 compared to 2015 for the same period
- Jamaica's geographical location is in close proximity to the Americas.
- Jamaica has a rich sports and cultural heritage and is the originator of Reggae music, the birthplace of Bob Marley and the world's fastest man, Usain Bolt.

### **Weaknesses**

- During the hurricane season Jamaica has a rare chance of getting affected due to flight and Cruise cancellations.
- High crime rate -though effort is continuing to contain it.

### **Opportunities**

- Construction of Special Economic Zones will lead to an increase in Tourist arrivals.
- With a 4 percent per annum growth rate the sector is expected to increase in growth to 5 percent by 2020.
- Jamaica was recently ranked third coolest nation on the CNN's 14 coolest nations.

### **Threats**

- Close proximity to other islands can lead to competition. Need to provide best products and services to maintain the market.
- Exchange rates can fluctuate from 2 to 15 percent.

## ASSESSMENT

Jamaica has considerable pool of natural resources, skills and professional acumen to maintain and improve its tourism products, to meet international standards. Jamaican Government has been taking a keen and sustained interest in developing this sector. New investors can now enter the market with innovative ideas such as eco-tourism, wellness travel, water sports etc.

Jamaican culture revolves around the central idea “Out of Many One People”. Literally and spiritually, this society welcomes everyone without discriminating in the name of colour, class, language, gender or race. Nature and topography have always been kind to Jamaica. Tropical climate and regular rains have been contributing to the healthy eco-system of Jamaica. 120 rivers in a small island and grand presence of Blue mountain peaks makes it a blessed land. Even during severe hurricane season, Jamaica has been experiencing incredible protection for last many years. Blue Mountain ranges also are acting like a protective wall in the east of the Island from where hurricanes normally hit.

However, this society has issues like lottery scams, arms smuggling, high homicide rates etc. Government has taken some strong measures to control the law and order situation: positive effects of which are already visible in the society.

In a nutshell, rich culture of reggae music and sports, richness of flora, friendly, welcoming green terrain and cleanliness of the beaches are always going to keep Jamaica in the top list of Tourism destinations. Jamaica is estimated to have earned US\$4.3 billion in 2018 from Tourism alone. Efforts by the Government to improve the sector includes the Tourism Enhancement Fund (TEF) and Productive Inputs Relief (PIR) system among others. These initiatives are expected to protect the interest of the prospective investors and help them tap the potentials.

## **CONCLUSION**

Jamaica is an excellent vacation choice for all ages and backgrounds. The island is loved for its warmth, friendly people, beautiful beaches and sceneries, cuisine, music and vibrant culture. A culture that is bursting with a mixture of so many histories and stories from across the world. But like many developing nations, Jamaica has her challenges. It is necessary for the Government to find ways to reduce crime and corruption through the reduction of poverty if it hopes to continually attract tourists and keep that important revenue stream. If crime is not eradicated or reduced then all the omnibus incentives being offered will eventually become useless in attracting investments to the island's beautiful shores.

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