

TOURISM

World Tourism

There has certainly been a significant amount of travelling worldwide. For 1999, world tourist arrivals amounted to 656.9Mn, 3.2% over 1998. According to the World Tourism Organisation, the region experiencing the greatest level of growth in tourism is the Middle East with a growth rate of 17.5%. The East Asian/Pacific region was reported to have a growth rate of 7.5% and total arrivals reach 93.6Mn. This comes after two years of declines in tourist arrivals.

The African region grew 9% in tourist arrivals for the year with countries increasing numbers of arrivals by as much as 22%, 26% and 17% in the cases of Morocco, Zambia and Zimbabwe respectively. The region is expected to continue in a steady growth path over time.

Results in the Americas however, reflect a wide range of growth rates. The figures show a large decline of 10.4% for Puerto Rico, increases of 1.3% and 2% for United States and Mexico respectively. Among the high rollers were Cuba (16%), Argentina (23%) Guatemala (29%) and El Salvador (26%).

The European region, though hosting over 50% of the world's total tourists, only increased total arrivals to the region by 1%. France however, remains a popular destination, ranking number one for 1999 and visited by 71.4Mn tourists, while holding its place at third among high tourism earners.

The sharp increase in arrivals to eastern destinations (8.7%) comes at a time when the world is getting ready to cross over into the new age, and many take the choice of a pilgrimage instead of the regular sun, sand, sea and western cultures.

Growth in Tourist Arrivals	1995	1996	1997	1998	1999
East (Africa, Asia, Middle East)	-	8.79	1.7	1.5	8.7
West (Americas, Europe)	-	4.7	3.9	3.07	1.7

Graph - Growth in Tourist Arrivals

Table International Tourist Arrivals by Region						
Country	1995	1996	1997	1998	1999	Change 98/99
Africa	20,327	21,930	23,419	25,023	27,263	9%
Americas	110,689	116,700	118,334	122,027	126,709	3.8%
East Asia/Pacific		89,037	88,254	87,183	93,679	7.5%
Europe	338,454	353,700	370,616	381,939	385,910	1%
Middle East	12,356	13,234	14,261	15,314	17,992	17.5%
South Asia	4,200	4,434	4,834	5,190	5,380	3.7%
World Total	567,381	599,035	619,718	636,676	656,933	3.2%

Jamaicas Performance for 1999

Jamaica attracted a total of 2,012,738 visitors in 1999. Of this number 1,248,397 were stop-over arrivals, while the remaining 764,341 visitors were cruise ship passengers. January to December 1999 saw an increase in stop-over arrivals of 1.9% over 1998 and 13.5% increase in cruise ship arrivals for the same period.

Foreign nationals visiting the island for this one year period represent 92% of stop-over arrivals with a majority staying for long durations.

Throughout the period, seasonal fluctuations were evident in the number of foreign nationals recorded to have landed. March saw 123,849 foreign nationals in the 'carnival-spring break season', the highest number recorded for any month this year. The summer months, June to August followed in high numbers with 101,407, 113,029, and 104,044 foreign nationals arrivals

arriving chronologically. September saw the least number of foreign nationals for 1999 and the number recorded for December was 9% less than that for December 1998. The large decrease in arrivals of foreign nationals for December 1999 is believed to be a consequence of the 'Y2K frenzy'.

The effect of the April riots was a 3% reduction of total stop-over arrivals for the month. There was also a 14.3% reduction in the number of cruise ship calls for the month of May, believed to be as a result of the tension which existed in the country and the extensive media coverage at this time.

Although December recorded the highest number of non-resident Jamaican arrivals for the year, the figure was 14.8% less than that for the previous year, 1998. This suggests that the 10% reduction in total stop-over arrivals were as a result of a general fear of travelling at the mercy of the Y2K bug.

The largest number of calls to Montego Bay came in the 'spring break season', revealing a 128.6% increase in calls over March 1998 and 155% increase in pax. August recorded the least number of calls to the city and there was a 13% reduction in the number of calls in December 1999.

Ocho Rios has had a bad year in the areas of cruise ship arrivals. Although March recorded 33 calls for Ocho Rios, there was a 10.8% reduction in the number of calls over that one month period in 1998. This continued for the remaining months to August; the number of calls and pax had reduced when compared with the same period for 1998. There was no change in the number of calls for September or December, but pax increased by 6.3% and 6.8% respectively. For the year, number of calls to Ocho Rios reduced by 2.9% while pax only increased by 2.6%.

In total, the greatest number of calls and the largest pax were recorded for March 1999, while the lowest was for May. December saw a 5.2% reduction in calls but total calls for the year increased by 15.6%.

For January to November 1999, 70% of stop-over arrivals were from the United States with number increasing by 5.9% over the figure recorded for January to November 1998. The number of tourists from Canada, Europe and other destinations declined while there was an increase in tourists from United States and the UK over January to November 1998. For the same period, January to November 1999, the greatest proportion of stop-over arrivals were in the age 25 to 34 category. However, there was a significant increase of 12.4% of tourists age 18 to 24 over the corresponding 11 month period in 1998.

The tourism industry for January to October 1999, saw an increase of 1.19% in cumulative expenditure from visitors over the corresponding period in 1998. The figure for 1999, January to October, amounted to US\$982.4Mn.

Age Distribution 1998 - 1999					
Age	1999 Jan-Nov	% Share	1998 Jan-Nov	% Share	% Change 1999/98
Under 18	138,237	12.1	135,934	12.3	1.7
18 - 24	122,028	10.7	108,599	9.8	12.4
25 - 34	313,087	27.4	312,049	28.2	0.3
35 - 49	353,665	31	339,939	30.7	4
50 - 64	168,414	14.7	164,089	14.8	2.6
Over 64	46,619	4.1	46,579	4.2	0.1
Total	1,142,050	100	1,107,189	100	3.1

Caribbean Tourism

Tourism in the Caribbean has depended largely on the sun, sand and sea concept since the region is blessed with the world's most beautiful beaches and delightful climate. However, tourists are now asking for a more and are demanding more comprehensive package. Because of this, only destinations which offer variety and their truly native culture will survive in the coming decade.

Bahamas continues to be one of the most popular destinations in the region with a 14.4% increase in cruise arrivals for January to September 1999, over the same period in 1998. A

number of destinations saw declines in cruise ship visitors, but a significant increase of 95.4% was recorded for St. Vincent and the Grenadines for January to September 1999 relative to the same period the previous year.

Big winners in stop-over arrivals were Cuba and the Dominican Republic. For January to September there were 1,212,020 stop-over arrivals in Cuba, showing a 17.3% increase over 1998, as given by the Caribbean Tourism Organisation.

The Dominican Republic, January to August saw 1,889,563 stop-over arrivals and reported a 10.2% increase for that period over the 1998 period January to August. This figure for Dominican Republic is larger than that reported for Jamaica's January to October 1999.

St. Kitts & Nevis was a big loser over all with arrivals falling by 16.4% for the January to June 1999 period, relative to January to June 1998. Winter arrivals fell by 22.4% while summer arrivals declined by 2.4%.

Tables

Outlook

An observant person once said that the best thing about Jamaica is the people and the worse thing about Jamaica is the people. This only shows that Jamaica's Tourist Industry sits on a wealth of resources which spans further than physical beauty. The major problem then is the attitude and management of these resources. Consequently, the only way the industry will experience improvements is through extensive education to stimulate creativity and pride among the population.

The large decrease in income and arrivals from tourists in the Ocho Rios area is as a result of the high level of tourist harassment in the town. This is something that needs to stop instantly and the eradication can be achieved through education.

The World Bank has recently put a super high value on the Montego Bay coast. It is believed that the coastline is not only beautiful but boasts a high value in the area as biogenetics. This gives the authorities even more reason to implement proper maintenance and protection measures. Care should be taken in sustaining Jamaica's physical assets, and encouraging the development of eco-tourism to heighten the pressure on the precious coastline is a good start.

The biggest season for tourism in Jamaica in 1999 was the 'carnival - spring break' season. Coupled with that, the greatest increase by age group were from young persons ages eighteen to twenty-five. The country needs to capitalise on this as there is obviously something magnetic about the season and there are more attractions for young persons. As such the destination can easily be marketed as a young adult destination and the industry must realise that there is also room for improvements.

The current trend in world tourism suggest that more visitors are seeking more than a good time at the beach. It is time to market the real culture of Jamaica. Even more importantly now as Cuba is building their tourist sector and slowly opening their economy. It is important for tourists to get the true picture of the country and the warmth of the 'grass roots' people, instead of hiding away in hotels which only remind them of home. Getting the population involved will not only encourage revisits but give the small man on the street a chance to have a nice meal once in a while.

For Jamaica to have a better year in 2000, a revolution and massive campaigning is necessary. Everyone is curious about Cuba and what that country has to offer. Having Cuba ninety miles away is nothing less than direct competition and from the figures, very good competition. Jamaica needs to give visitors good reasons to return, good things to tell their friends about the destination and a very comprehensive marketing campaign.

Ref: Tourism (1999_2000) - Econ Dept.