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Gordon, Leo-Rey and Harris, Mark

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The not so “all-inclusive” tourism in Jamaica: Economic linkages to local supply

Leo-Rey C. Gordon

&

Mark D. Harris

Abstract

The government of Jamaica enacted a strategic master plan in 2010 to encourage the tourism sector's inclusiveness by enhancing the participation of villas and other small lodging accommodations, increasing the use of locally grown produce, and encouraging commercial activity with formal and informal goods and services providers. An inclusive industry with strong economic linkages should encourage broader distribution of income and welfare. Field work was undertaken to assess stakeholders' views on their commercial activity with the tourism industry. The sampled participants report stagnant and in some cases declining economic linkages with the industry. The results indicate that initiatives should be further undertaken to ensure a wider economic reach of the nation and region's largest sector.

Contact: Leo-Rey Gordon - leorey1@gmail.com

Introduction

Money spent by international visitors on goods and services is a significant driver of economic activity in Jamaica and other small island nations. The World Travel and Tourism Council (WTTC) reports that spending associated with tourism in the Caribbean totals US \$48 billion, approximately fourteen percent of the value of the region's GDP in 2012 (Travel and Tourism Council [WTTC], 2013a). In addition, the tourism sector accounts for two million jobs, or twelve percent of regional employment. In Jamaica, tourism experienced tremendous growth with the innovation of the all-inclusive product in 1978 (Stupart, 2012). Despite the predominance of the all-inclusive concept, which is often labeled an enclave in nature, the industry is estimated to provide significant direct and indirect benefits to the economy (McCatty, 2006; Taleghani, 2010). Here, commercial tourism activity is estimated to be more than double the average for the region, in which the total direct and indirect contribution to GDP and employment is estimated to be 27% and 25% respectively (WTTC, 2013b). Further, its per dollar economic impact in Jamaica is larger than any other commercial industry (Oxford Economics, 2012).

Paralleling these statistics are those on the stagnant, and in some cases declining, standards of living of the Jamaican people and many other small developing states. At the core of this issue, and that critical for welfare improvement, is the extent of *real linkages between major commercial activity and the broader economy*. Such economic inclusiveness ensures that parts of the surpluses created from growth industries can also be enjoyed by the broader populous, such that economic growth is accompanied by a wider distribution of improvements to well-being.¹ More generally,

¹ An inclusive industry, in other words, is one with strong linkages to the broader economy. It enhances national economic growth due to the increased levels of indirect commercial business activity and the reduction of foreign capital leakages it creates.

linkages between lower income groups and commercial sectors are vital for improvements in the quality of living

Despite the estimates of the economic size and employment associated with tourism, The World Bank characterizes the industry by low levels of inclusiveness in Jamaica (World Bank, 2011), arguably due to the predominance of the all-inclusive hotel model which generally insulates visitors from other local markets (Ajagunna, 2006). As Jamaica's largest industry, an important and under-investigated issue is the prevalence and strength of linkages between tourism and the wider populous. Most of the literature assessing economic linkages of tourism use methods such as Input-Output accounting analysis, examinations of tourist expenditure patterns, or economic growth regressions. Further, most of these estimates are done with respect only to agricultural sectors.

This paper contributes to the body of knowledge by describing the commercial reach, beyond agriculture, associated with visitor spending. Specifically, the study undertakes a qualitative approach to assess the linkages between tourism and a range of business participants. Semi-structured interviews were conducted with specific stakeholder groups to assess their perceptions on the extent of linkages. The interviewed groups included departing non-national visitors, the management of formal and informal businesses associated directly or indirectly with the sector, the management of hotels, as well as representatives of related government and non-government agencies. Statistical data were collected when possible to represent the trends experienced by the surveyed participants.

The sampled farmers, domestic produce suppliers, and proprietors of craft markets reported a decline in their involvement with the industry. These results suggest that strategies aimed at

enhancing standards of living in Jamaica and other small island developing states should actively include and attempt to address the inclusiveness of large industries.

A review of related literature

In addition to indicators of visitor accommodation and financial performance, the success of a nation's tourism sector should be measured in part pursuant to the extent of its integration with surrounding communities (Ashley, 2000; Brohman, 1996). Such measures would capture the degree to which the tourism product includes local livelihood, employment, and indirect investment. Policy makers should be further cognizant of the geographic areas in which residents might benefit most from its inclusion, as these will encapsulate the greatest potential for welfare improvement (Jamal, 1995; Tosum, 2000).

More formally, improvements to the standard of living arising from visitor spending are determined by the strength of economic linkages and the resulting multiplier effects. These linkages create direct, indirect, and induced commercial activity. Figure 1 presents this in a conceptual framework.

Tourism creates immediate direct economic benefit through visitor spending on accommodation and other consumption needs. Further economic benefits are then indirectly generated based on the use of supporting services and spending induced by the additional consumer demand created from direct labor wages. Figure 1 further shows that the total economic benefit is reduced by the proportion of income used for imports or other forms of capital leakages. Welfare improvement through enhancing the inclusiveness of commercial sectors is therefore described as a process that broadens the population that receives direct benefit from visitor spending, while increasing the number of local agents receiving indirect benefit.

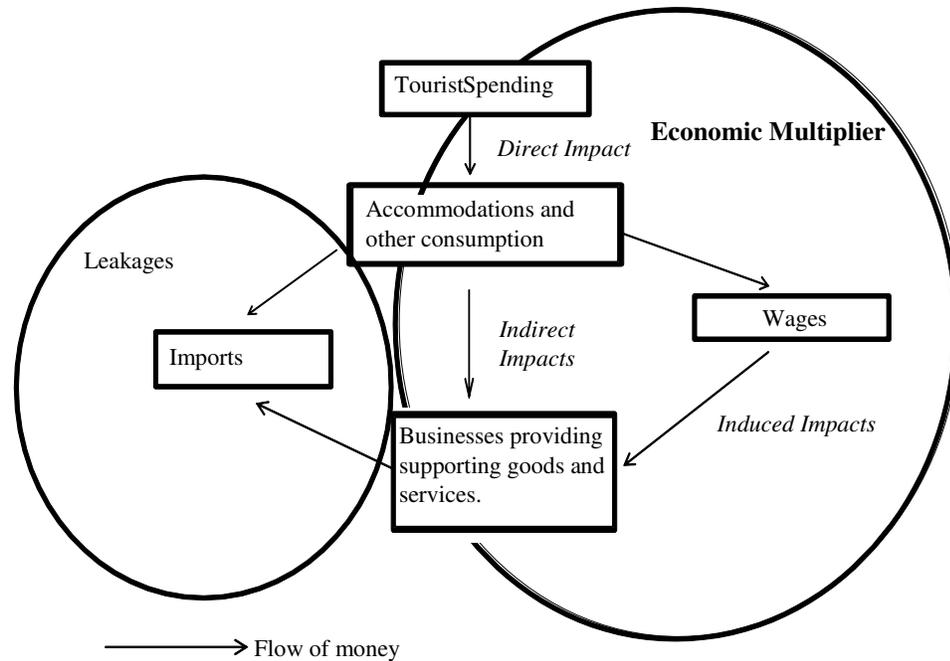


Figure 1 Economic Multiplier

Assessments of tourism linkages have predominantly been undertaken by evaluating the use of local agricultural supply (Clancy, 1998; Rogerson, 2012; Telfer, 1996). Broadly, these studies demonstrate that the relationship between tourism and domestic agriculture is not without variation, but is dependent on the type of tourism product offered and the tastes demonstrated by visitors. Low income territories are predominantly characterized by “enclave” tourism which is more inclined to insulate the visitor experience from local communities. In these cases there are weak economic linkages. These situations often are attributed to the inability of small local farmers to consistently provide a sufficient supply to large hotel chains. Safety is also often reported as an explanation for weak economic linkages. Magnifying these drivers of weak linkages in low income states is that these states are usually characterized by majority foreign ownership of supporting services which will lead to high capital leakage rates.

The leakage of financial capital significantly reduces the potential of welfare enhancement by weakening or altogether eliminating associations with local suppliers. It is estimated that one-third of Jamaica's tourism revenue is lost in leakages (Oxford Economics, 2012). Notably, this is significantly less than the estimated 80% leakage rate for the wider Caribbean island region (World Bank, 2011). Most of this economic leakage is attributable to the importation of food product, as all-inclusive hotels generally tend to use a higher proportion of imports (Belisle, 1984; Timms, 2006). High leakage carry significant opportunity costs. In the case of Peru (Mitchell, 2001), it is estimated that if local businesses could absorb just 10% of what is lost in leakages, the benefit gained locally would equate to three times the average annual provincial income.

The principal explanation for the extent of inclusiveness, however, might not be found in the tourism industry or its management, but rather in the broader state of the country's macroeconomic development. Some argue that low-income tourism destinations will demonstrate weak linkages and generally high leakage rates due to intrinsic features that are correlated with that state of development (Lejárraga, 2010). Some scholars argue that, for example, the consumption preferences of international travelers significantly different from that available in local communities, driving a commercial *need* for high rates of importation (Karagiannis, 2003).

On the surface, anecdotal and empirical evidence might suggest a great degree of success in Jamaican tourism. Despite this, Jamaica ranks among the lowest countries in the Western hemisphere in terms of standard of living. Much of the business literature is restricted to assessments of linkages to agricultural sectors. Further, very few qualitative assessments have been conducted to assess the state of tourism linkages generally in Jamaica or the wider Caribbean (Spenceley, 2012). We contribute to the literature on developing market studies by providing some description of tourism's inclusiveness with specific segments in Jamaica.

Methodological Approach

Selection Criteria

Understanding the significance and further potential benefit of tourism for economic well-being, the Jamaican government in collaboration with the tourism industry developed a strategic “Master plan” to move the industry on a path of sustainability and growth (Ministry of Tourism, 2010). The Master Plan defined five critical objectives: growth based on a sustainable market position, enhancing the visitor experience, community based development, environmental sustainability, and the promotion of an inclusive industry.

The government’s plan for improving the inclusiveness of the tourism sector was framed within the concept of pro-poor and community tourism, in which tourism development should ensure the involvement of local suppliers for sourcing and procurement, further support micro enterprises in the informal sector, and further increase domestic employment. The specific initiatives were to:

1. Improve the opportunities for local people to sell goods and services to visitors in craft markets.
2. Increase the extent of agricultural produce supplied to the tourism industry through local farmers and intermediaries.
3. Increase the participation of local villas, apartments, and guest houses.

Conceptually, initiatives one and two should enhance economic welfare through its direct effect on employment and income, while the benefits of the third initiative are derived from the indirect effects on employment and income.

The targeted groups outlined in the Jamaican government’s strategic plan formed the basis of the included sample. Electronic mail was sent to major food suppliers, hotel management, and government and non-government agencies, to solicit participation in the study. Those responding

were given semi-structured interviews to ascertain their perspective on the inclusiveness of the sector. Departing international visitors and local craft vendors were randomly sampled to solicit their experiences with regards to local spending. Table 1 provides a list of the study participants.

Table 1 Study Participants

Group	Organization	Interviewee
Government and Non-government	Jamaica Tourist Board	Senior Director of Research and Policy
	Jamaica Tourist Board	Manager – Economic Research
	Tourism Product Development Company	Financial Controller
	Jamaica Hotel and Tourist Association	President
	Jamaica Association of Villas and Apartments	President/Director
Hotels ²	Sandals Resort International	Director of Operations
	Pegasus Hotel	Financial Controller
	Wyndham Hotel Jamaica	Director Marketing
	Breezes Runaway Bay	General Manager
	Charela Hotel	Deputy Managing Director
	Rondell Village	General Manager
Large Food Suppliers	GraceKennedy	Domestic Food Manager
	Jamaica Broilers	Director – Communications
	Jamaica Producers Group	Director Sales & Marketing
Informal and Small Business	Craft vendors (20)	
International visitors ³	International visitors (15)	

Analysis

Separate interview questions were customized for the various groups. When we interviewed the management of four large hotels, the main purpose was to ascertain trends in the

² The sample represented the different destinations hubs in Jamaica. Two hotels are located in Kingston, two in Montego Bay, and two are in Negril. Of the six hoteliers interviewed, two hoteliers worked for all-inclusive hotels, while the remaining four executives worked with small-and-medium size traditional plan hotels.

³ A random sample of international visitors of non-Jamaican heritage either through marriage or parentage was chosen.

volume of goods supplied by local farmers and to understand the amount of goods imported for operations. Management level employees of the sampled hotels were interviewed to ascertain their observations on visitor spending with local businesses.

Executives of the three largest food processing and distribution firms in the island were interviewed, as well as twenty small art and craft vendors. These questions aimed at assessing the share of business derived from the tourism sector and to ascertain current issues associated with enhancing linkages. Estimates of the revenue earned from tourism by the sampled food suppliers were obtained when possible.

Fifteen departing international travelers were interviewed at the Donald Sangster International airport in Montego Bay. These interviews were aimed at understanding their accommodation preferences, the activities they engaged in while in Jamaica, and their spending habits with local craft vendors and restaurants.

Representatives of five government and non-government agencies were also interviewed. These included the Ministry of Tourism that has responsibility for the development and implementation of strategic tourism plans; the Jamaica Tourist Board which is responsible for marketing tourism; and the Tourism Product Development Company (TPDCo) which is responsible for developing and maintaining tourism products. These organizations are working in concert to support the strategic goals of enhancing the local linkages associated with tourism. These interviews sought to gain an understanding of the actions taken to help local businesses and farmers enhance commerce with the hotel sector. We obtained from government and non-government agencies their views on the inclusiveness of the sector.

The interviews for each category of respondents were guided by a set of semi-structured, open-ended questions. The interview responses were transcribed, coded, and categorized by

identifying key words. Content analysis involving the review of transcripts was undertaken; this process resulted in the identification and categorization of concepts and themes. The resulting framework was used to understand the concerns and perceptions of the interviewed participants. In turn, this paper relies upon the triangulation of the responses of the various interviewee groups as support for its general conclusions. Further, statistics were obtained when possible to illustrate the extent of inclusiveness over time.

Generally all interviews aimed to obtain a description of the state of inclusiveness of tourism in Jamaica. Particular emphasis was placed on those specific initiatives identified in the Jamaican government's strategic plan. These included improvements to commercial activity in craft markets, increasing the use of local agricultural products, and improving the frequency of accommodation in small villas, apartments, and guest houses. The following section discusses the findings with respect to each.

Results

Commercial Activity with Craft Markets

We asked departing visitors the number of times they shopped or ate outside of their place of accommodation and to estimate the amount of money spent. The table below summarizes the responses. Nine of the fifteen visitors shopped at local craft markets during their trip, on average spending a total of forty-five U.S dollars. The items bought typically included clothing and souvenirs. For those who shopped outside of the hotel there was a stated preference to shop in duty free shopping villages as opposed to informal markets.

Table 2 Percentage Response of Departing Visitors

	None	One visit	More than once	\$0	Less than \$50	More than \$50
Visits to Local Markets	40%	60%	0%	---	---	---
Dining at Local Restaurants	47%	26%	27%	---	---	---
Local Spending	---	---	---	20%	50%	30%

Twelve of the fifteen respondents were staying at all-inclusive accommodations.

A number of reasons were provided for this preference. Among these was the fact that duty free shops provide similar goods to those found in craft markets, but also offers additional products such as fine jewelry, alcohol, and cigars. It was further stated that duty free areas provided a more comfortable shopping environment compared to the local craft markets, as these stores are spacious, well organized, and free of aggressive selling tactics. In addition, pricing in duty free villages are often comparable to that in local crafts. While some tourists did visit local markets, only a few made purchases.⁴

Regardless of whether visitors shopped in informal craft markets or duty free villages there were common concerns voiced about issues that reduced their willingness to buy. First, goods were not viewed as being priced competitively when compared to overseas markets. For example, one visitor stated that an item such as a t-shirt was priced at almost twice the price for a comparable product in the U.S. In addition to general views about price, concerns were expressed on aggressive selling tactics within craft markets, in which there is often a perceived pressure to buy items while window shopping.

The statements of crafts and goods market proprietors were largely aligned with those of the interviewed visitors. Discussions with twenty craft vendors located in the Montego Bay, Ocho Rios, and Negril markets confirmed that the general increases in tourism arrivals to Jamaica are

⁴ Albeit a small sample, possible insight is still gained on the issues associated with weak linkages through visitor behavior.

not reflected in the number of visits to their business establishments. First, most believed that large hotels and cruise ship operators do not sufficiently promote local craft markets. In fact, exposure to international visitors is only promoted through an ongoing arrangement in which a select few craft vendors may visit certain hotels once per week to display their crafts—at a fee of approximately US \$25.00 per visit.

Confirming the sentiments provided by those visitors interviewed, the sampled craft vendors state that aggressive selling and perhaps the unattractive appearance of the market infrastructure contribute to the lack of sales. To explore this issue further we observed that the craft markets were in fact in poor physical condition. The shops were not properly maintained with sometimes leaking roofs or no cover for protection from the sun. Further, the products in the craft markets are not well organized and are not easily accessible without the help of the vendor.

Increased competition from formal duty free shopping villages located outside hotel premises was also voiced as a major hindrance to linkages with local craft vendors. Duty free shops which had traditionally sold alcohol, cigars, or jewelry have now diversified by selling crafts and souvenirs sold in the informal markets. We further confirmed that duty free prices are sometimes much lower than the craft markets and in an environment that is hassle free and more secure.

Representatives of the Ministry of Tourism further substantiated the sentiments of weak linkages with craft markets despite the growth in visitor arrivals. In summary, aggressive selling and sometimes visitor harassment, lack of product innovation, and an unappealing shopping environment are voiced as the reasons that informal craft markets do not receive higher levels of business from the tourism sector (Senior Director Research, personal interview, June 15, 2011).

Usage of Domestic Agricultural Produce

The use of local agriculture by hotels is viewed as a significant arm of enhancing tourism linkages. One of the goals targeted by the government of Jamaica to enhance the inclusiveness of tourism was to increase the participation of local farmers. With this objective, the sector embarked on specific agriculture linkage projects, a main component of which was the negotiating of contracts with local farmers to grow and store crops for distribution to the hotel industry. However, the operationalization of the attempted strategy has been frustrated by a lack of managerial resources. Jamaica's limited agricultural capacity further impairs the ability of local farmers to supply tourism markets.⁵ This fact is cited as perhaps the greatest obstacle preventing farmers from sustaining long-term contracts with hotels (Senior Director Research, personal interview, June 15, 2011).

Food processing and manufacturing play a fundamental role in the distribution of local agricultural products. As such, representatives of the three largest food processing and distribution firms in Jamaica were interviewed to obtain information on the sales trends associated with the tourism industry.⁶ The trends over time in revenues derived from the tourism sector for two of the three firms is presented in Figure 2 below.

⁵ The Ministry of Agriculture, in coordination with the MOT, is exploring hydroponics and other forms of productivity enhancing technologies with an aim of increasing production and alleviate shortages.

⁶ These were Grace Kennedy, Jamaica Broilers, and Jamaica Producers Group Limited. GraceKennedy is one of the largest conglomerates in the Caribbean offering both food and financial services. Jamaica Broilers supplies agricultural products of livestock. The Jamaica Producers Group is a leading snack food producer.

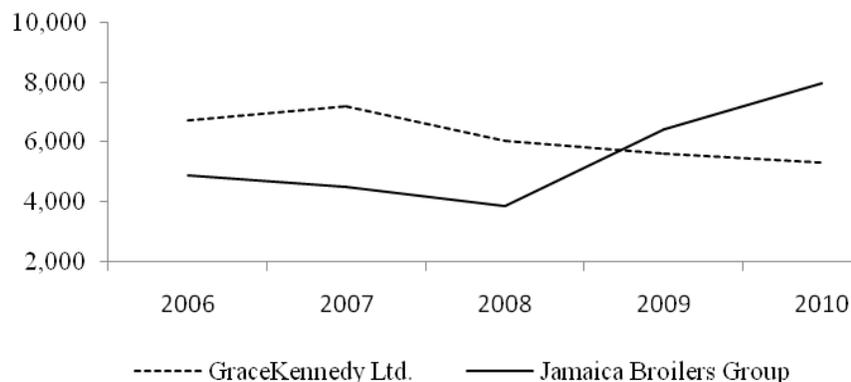


Figure 2 Tourism Revenue (US\$ thousands)

Tourism revenue is calculated as direct sales to hotels. The significance of the hotel sector to business operations might be understated due to the fact that these firms supply to wholesale businesses that subsequently provide to the tourism sector. Data were not obtained for Jamaica Producers.

For both firms, tourism revenue is viewed as a significant portion of business operations. In the case of Jamaica Broilers US \$7.9 million in tourism revenue accounted for 6.5% of its total in 2010 (Director of Sales & Marketing, personal interview, June 16, 2011). The trends in tourism revenue vary by firm, such that commercial activity associated with the hotel sector and extent of tourism linkages is firm specific. Nevertheless, the total revenues obtained from tourism have remained relatively unchanged, moving from approximately US \$ 12 million in 2006 to only US \$13 million in 2010 despite growth in visitor arrivals.

The Jamaica Producers group's association with the tourism sector is predominantly indirect. Its products are sold to duty free shops and other wholesalers who then supply the tourism sector. For example, the largest tourism related customer of Jamaica Producers was the national airline carrier, Air Jamaica Ltd. Since the sale of Air Jamaica to a Trinidadian based company, the Jamaica Producers group has lost all tourism-related revenue associated with carrier service. More broadly, Jamaica Producers has experienced stagnant or declining revenue growth associated with tourism, and thus, its operational strategy has shifted away from marketing its goods to the

tourism industry to diaspora communities overseas (Manager Communications, Personal interview, June 17, 2011).

Although restaurants are not an official part of the strategic plan, they do represent a means of increasing the use of local agricultural products and upgrading value added. Data collected from the Jamaica Tourist Board indicated that in 2010, only US \$21.8 million, or 1.1% of total tourist expenditures, went to local restaurants (Jamaica Tourist Board [JTB], 2011). Operators of food shops en route to the hotels, airport, and attraction centers reported that on average 15% of sales is derived from international visitors. Similar to the figure reported by local craft vendors, these operators are not experiencing increased linkages with the tourism sector.

Overall, despite efforts there is little evidence of strengthening linkages between the tourism sector and domestic produce industries. Only one of the sampled produce manufacturers demonstrated increases in revenue from the tourism sector. This trend represents an exception to the produce sector, however, as the other sampled participants noted declining trends in revenues associated with tourism.

The Participation of Local Villas, Guest Houses, and Apartments

Two business models are predominant in the hotel sector of Jamaica. These include the comparatively new “all-inclusive hotel,” in which food, drink, and entertainment is included in the price of stay. We will use the term “traditional model” to classify non-all-inclusive facilities in which food and drink is charged separately. Increasing the share of tourism business received by traditional model accommodations such as villas, guest houses, and apartments, was the third aspect of enhancing hotel sector linkages.

Though visitor arrivals to Jamaica have increased over the past ten years, the proportion of accommodation accounted for by villas, guest houses, and apartments has remained constant. On

average these facilities account for 26% of rooms reserved. Figure 3 shows the proportion of accommodation by type of facility. All-inclusive hotels not only demonstrate dominance in the number of rooms issued but also in the percentage occupancy rate. Here, traditional model hotels have an average occupancy rate of 40% between 2007 and 2012, compared to a 67% for all-inclusive establishments.

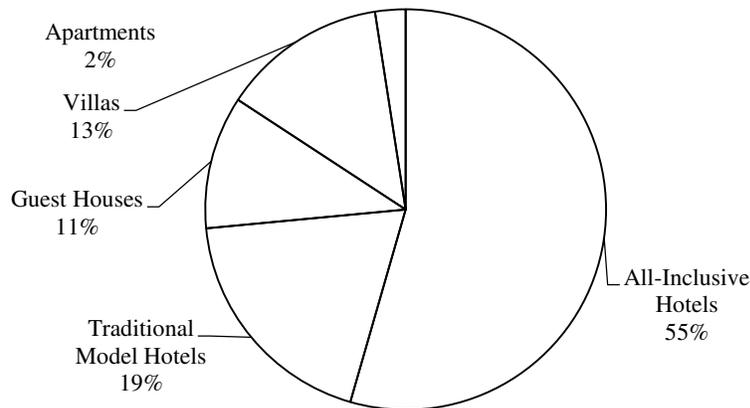


Figure 3 Accommodation by Type (2012)
Source: JTB (2012). Total accommodation of 28,500 was provided in 2012.

Due to the nature of its structure, traditional model accommodation providers allow for greater tourism linkages with the broader economy. These members promote visits to local craft markets, restaurants, and other attraction sites. The interviewed managers of traditional plan accommodations estimate that most guests leave the premises to visit local markets and restaurants. This can be compared to that estimated by management of the sampled all-inclusive hotels who estimated that 90% of guests do not leave the premises to dine externally and only 30% would partake in other outside activities (Director of Operations, personal interview, June 14, 2011). Figure 4 presents estimated statistics associated with linkages due to traditional model accommodations.

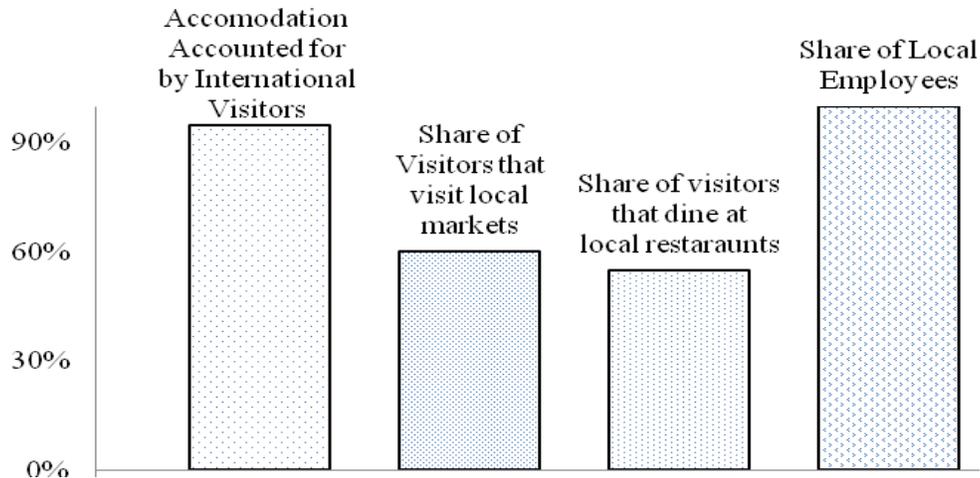


Figure 4 Aspects of Domestic Linkages Associated with the Sampled Traditional Model Accommodation Providers

Source: The average estimates provided by the four sampled traditional plan hotels.

Capital Leakages

The amount of liquid capital lost to international leakages affirmatively hampers the development of an inclusive industry. This outflow may take the form of repatriated profit and can also include funds spent on the importation of operating and capital goods. We interviewed executives of the Jamaica Hotel Association and the Jamaica Association of Villas and Apartments to obtain their estimates of the use of imported produce. It was the common view that leakage rates for guest houses, villas, and apartments, are smaller than that for larger establishments. Based on prior knowledge it was estimated that all-inclusive hotels spend approximately 30% of revenue on imported product compared to the 7% import expenditure of small traditional plan establishments (President Jamaica Hotel Association, personal interview, June 14, 2011). An insufficient and inconsistent supply of local produce is stated as the predominant reason for the high proportion of importation by larger hotels. Hoteliers believe that local agricultural supply is simply unable to

meet the demand of the hotel sector. Price advantages and the stability of prices creates a further preference for the use of imported produce.

The issue of capital leakages is complex, as the reduced business linkages due to importation or revenue repatriation are not restricted to establishments that earn direct tourism revenue. Leakage also occurs through firms in the supply chain of the tourism product. High domestic manufacturing costs create an uncompetitive price environment, leading large produce suppliers to rely heavily on imports for redistribution. For example, it is estimated that 70% of GraceKennedy limited manufactured products use either imported raw supplies or are manufactured overseas.

Conclusion

Approximately 1.9 million travelers visited Jamaica in 2011; their spending accounted for 48% of total exports (World Bank, 2012). This concentration in tourism trade is ranked 14th in the world. Only nations such as the Maldives, Samoa, the Bahamas, and a few others, demonstrate such reliance on tourism. These and other statistics imply that the tourism industry of Jamaica plays a critical role in the provision of national income and foreign exchange. Despite this, there are still large opportunity costs incurred due to weak linkages between tourism and the broader economy, which is further compounded by the share of tourism revenue lost in foreign capital outflow.

The government of Jamaica embarked on a strategic plan for enhancing the inclusiveness of the industry. More specifically, action was taken to increase the participation of small villas, promote visits to local craft markets, and encourage the use of locally grown agriculture produce and livestock.

To date, a description of the extent of inclusiveness beyond agriculture in small states that rely heavily on tourism has not been done. With this objective we conducted interviews, surveying international visitors, government and non-government agency representatives, hotel management, and business operators to obtain estimates on the extent of inclusiveness of tourism in Jamaica. These surveys were based on the initiatives outlined in the government's strategic plan for the industry.

The first of the initiatives aimed to improve the opportunities for local persons to conduct business with visitors. However, this paper illustrates that the level of business activity experienced by local craft and informal vendors does not reflect the observed growth in tourist arrivals in Jamaica over the past few years. Moreover, these entrepreneurs report a reduction in tourism traffic as well as a reduction in the amount of money being spent by the tourists who visit.

Secondly we present a description of the issues related to the use of domestic agriculture in the sector. The agricultural sector suffers from the disjointed nature of the landscape, a non-existent supply chain management system, and insufficient supply necessary to meet the demand of both the hotel industry and other local markets. As a result, the study found that there has been limited progress made in increasing the amount of goods sold by local farmers to the hotel industry, and especially to larger all-inclusive hotels.

Of the three initiatives outlined to improve tourism linkages, the participation of villas, guest houses, and apartments, has been most consistent. The share of tourism business accounted by this category has neither declined nor increased, but has remained steady over the past decade.

Overall, we gather that there are still considerable opportunities of enhancing tourism linkages with the broader economy pursuant to the government's strategic plan. The description of some of the issues associated with tourism sector linkages in Jamaica also has significance for

other small tourism dependent states. Members of the tourism community should be cognizant of the mechanisms by which the industry creates development and enhances welfare in its host environment. Further, organizations actively involved in enhancing various linkages should be aware of the value of well-maintained infrastructure in local craft markets, as well as the importance of innovations in the items sold. Investment in cost reducing agricultural technologies is also vital for maintaining high quality products that are globally competitively priced. Finally, focused marketing and advertising of small and medium sized accommodations is crucial if this group of businesses is to obtain greater market share.

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