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The Society For Caribbean Studies Annual Conference Papers

edited by Sandra Courtman

Vol.3 2002 ISSN 1471-2024

<http://www.scsonline.freewebs.co.uk/olvol3.html>

Postmodernity or Profitability? Changing modes of tourism in Jamaica.

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Abstract

Jamaica has the second largest tourist industry in the Caribbean, with vast development having taken place since the 1960s. Although the number of beds available in guest houses, resort villas and apartments has risen, the dominance of the large hotels appeared to be numerically unchallenged. However, in recent years there has been an upsurge in different types of accommodation developments. Hotel groups now specialise in providing “beautiful basics”, whilst international newspapers such as the New York Times acclaim “colorful wooden cottages that could have been designed by Matisse”¹. The apparent rise of smaller properties (inns and guesthouses) suggests the importance of being able to adapt more flexibly to changing tourist demands, and the growing fleet of massive cruise-ships provides a tropical island vacation without the need for an island.

These changes could be interpreted as the beginnings of a postmodern phase of tourism, in which individuality and character are perceived as more important than mass-produced consistency, in which place becomes more important than space, in which reproduction, pastiche and eclecticism are increasingly valued, and in which individuality is prized above all. This paper addresses this change and its implications, and what it suggests for the future of Jamaica’s tourist industry, by examining quantitative data from the last decade, as well as by analysing reports in the Jamaican and British media. In conclusion, I examine whether Jamaica’s tourist industry is keeping pace with changes in the demands of international tourists. I suggest that two new and distinct types of tourist developments are emerging in Jamaica, and discuss whether these are truly postmodern or are simply reflective of changing consumer demands.

Postmodernity or Profitability? Changing modes of tourism in Jamaica.

Introduction

It is appropriate for this paper to start with a confession. What you are about to read is a reflection on several topics which interest me but on which I have no formal qualifications to make definitive statements. To be perfectly frank, it stems from reading David Harvey's *The Condition of Postmodernity* (1990) whilst sitting beside the pool at the highly chic² *Jake's* in Treasure Beach on Jamaica's south coast shortly after Christmas. It is a mark of the clarity of Harvey's discussion that I found myself nodding in agreement even in such an idyllic setting, and that connections between the resort in which I was staying and the text that I was reading began to appear. Whilst I claim little expertise on the topics of profitability, postmodernism, or tourism theory, what I do know appears to be relevant to the trends in Jamaica's tourist industry as I have observed it since my early childhood – as a citizen, a consumer and a social scientist.

Jamaica has the second largest tourist industry in the Caribbean, with total visitor arrivals of 2.2 million (2000), of which approximately 60% are recorded as "stopover" visitors³. The roots of this volume of tourists can be found in the 1960s, when the recently formed Jamaica Tourist Board implemented programmes aimed at making the shift from "class to mass" tourism (Taylor 2001). However, in recent years there has been an upsurge in different types of developments, such as inns and guesthouses, some of which provide accommodation in an eclectic mixture of replicas of different spaces and times. Increasing numbers of visitors arrive on cruise ships and spend only a few hours in the country, whilst the nature of attractions is also changing: from the lines of tourists snaking their way up Dunns River Falls to smaller-scale attractions in which even the sunset is marketed as a "product".

These changes could be interpreted as the beginnings of a postmodern phase of tourism, in which individuality and character are perceived as more important than mass-produced consistency, in which place becomes more important than space, in which reproduction, pastiche and eclecticism are increasingly valued, and in which individuality is prized above all.

Prior to World War II, Jamaica was exclusively a destination for the extremely wealthy. The development of the airstrip at Montego Bay (now the Donald Sangster International Airport) was the catalyst to the post-war tourism boom. Whereas the port in Port Antonio (developed primarily for the export of bananas) had been the major point of arrivals before this time, the development of the airport put Montego Bay into pole position and the gradual decline of the eastern tourist industry began. Indeed, "among the British West Indian islands, Jamaica was the acclaimed leader in establishing mass tourism" (Taylor 2001: 911), and by the time of independence, "the genie of modernization was manifest everywhere, released by the arrival of mass tourism" (Taylor 2001: 916). In this paper I will discuss the extent to which Jamaica is still focussing on mass tourism, and the likely implications for the medium- to long-term sustainability of the industry.

A quantitative analysis of recent changes in the tourist industry

The overall number of visitor arrivals to Jamaica (both total stopovers and foreign nationals) has increased steadily over time, and suggests that the tourist industry is in good health (Table 1).

Table 1: Main Tourism Indicators: 1990-2000

	1990	1995	2000
Foreign National Stopovers	840,777	1,018,946	1,219,311
Non-resident Jamaican Stopovers	148,498	128,055	103,379
Total Stopovers	989,275	1,147,001	1,322,690
Cruise Ship Passengers	385,205	605,178	907,611
Hotel room nights sold	2,054,072	2,539,686	2,956,315
Average hotel room occupancy (%)	62.1	60.8	58.6
Hotel room capacity	10,776	13,841	16,100
Other room capacity	5,327	7,055	7,530
Estimated foreign travel receipts (US\$ '000)	740,000	1,068,500	1,332,597

However, room capacity has grown more rapidly than visitor arrivals, leading to a gradual decline in the average hotel room occupancy rate – a situation akin to that in the early 1970s, which preceded a drastic decline in Jamaica's earnings from tourism. Over the decade 1990 to 2000, hotel room capacity increased by 49.4%, whilst other room capacity rose at a slightly slower rate (41.4%). This does not suggest a drastic shift away from traditional hotel accommodation for the majority of visitors.

Whilst the number of total stopovers increased by 33.7% over this time period, the number of cruise ship passengers increased by 136%. However, there was a fall of 7.4% in the number of Cruise Ship Passengers arriving in 2001, a trend which is continuing in the first half of 2002, although industry sources (quoted in the *Daily Gleaner*, 22/05/02) expect that the industry will recover towards the end of the year. If present trends continue, the number of Cruise Ship visitors could exceed the number of stopover visitors relatively soon (Figure 1). However, it can also be seen that the number of visitors arriving on cruise ships tends to fluctuate more unpredictably than the number of stopover visitors, reflecting the flexible nature of this mode of tourism. In one sense this may benefit the country, as it means that it does not have to absorb the costs of empty rooms if there is a recession in the tourist sector; but on the other hand it removes the opportunity to compensate for a poor year by adopting other strategies. Over this time period the estimated total foreign travel receipts also rose, in this case by 80.1%. However, it is difficult to determine whether those who arrived were spending more money, because of the differences in time spent by cruise ship passengers and stopover visitors.

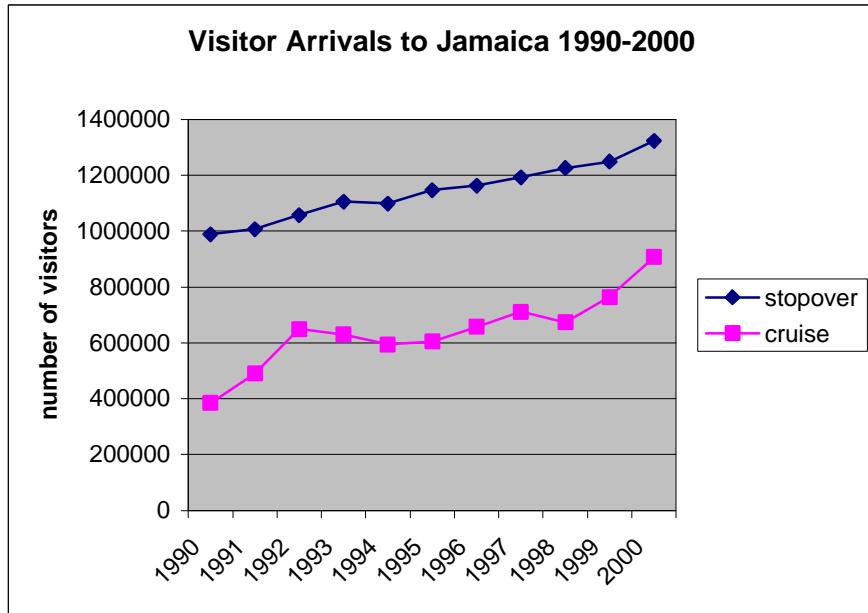


Figure 1: Number of Stopover and Cruise Visitors, 1990-2000

The average length of stay of visitors from the USA has remained fairly constant, and that for visitors from Canada appears to have increased slightly. However, there does appear to have been a reduction in the average length of stay of visitors from the UK and Europe (Table 2). The largest drop in average length of stay of visitors from the UK came between 1998 and 1999, where the average length of stay reduced from 20.3 to 18.1, possibly as a result of the increased traffic on charter flights which tend to be limited to 14 night stays. The more general reduction in the length of stay is probably associated with the increased ease of travel between Europe and Jamaica – in the mid-1980s there were only two or three direct flights each week between Jamaica and London, now there are two or three most days.

Table 2: Average length of stay of visitors from different locations, 1985-2000

	USA	Canada	UK	Europe	Total
1985	8.6	11.6	22.7	16.9	9.8
1990	8.8	11.3	21.9	16.2	10.9
1995	8.8	13.3	21.9	13.6	10.9
2000	8.4	12.2	18.6	13.2	10.1

However, these figures include all visitors, which could include a large number of Jamaicans living overseas visiting relatives (as many Jamaicans overseas have obtained foreign passports). Perhaps more revealing is the trend shown in the figures of nights spent by foreign nationals in hotel accommodation, as this is more likely to refer directly to tourists. Although this rose from 7.7 in 1990 to 7.9 in 1992, there was a decline each year between 1993 and 2000, when the figure was only 6.6. This appears to suggest that tourists visiting Jamaica are spending a shorter time in the island than previously – perhaps associated with a post-Fordist regime of accelerated consumption.

There was a general rise in the number of units offering rooms over the period 1990-2000. During this period, the total number of hotels rose from 119 to 197 (a 66%

increase), the number of guest houses from 211 to 313 (48%), the number of resort villas from 733 to 1208 (65%), and the number of apartments from 289 to 455 (57%). No one single type of accommodation appears to be growing much more rapidly than any other, although it does appear that the number of guest houses is lagging behind the other establishments. The room capacity also rose in all the main resort areas. In Montego Bay, it rose from 3816 to 4669 (a 22% increase), in Ocho Rios from 2526 to 3822 (51%), in Negril from 1272 to 3145 (147%), in Port Antonio from 148 to 295 (99%), in Kingston and St Andrew from 1221 to 1582 (30%), and in Mandeville and the South Coast from 86 to 352 (309%). It is at this point that we begin to have an inkling of a qualitative shift in the type of tourism, with the apparent increased development of Port Antonio and the South Coast. These areas are traditionally less ‘touristy’, but are each cultivating their own type of ‘alternative tourism’ (of which more will be said below). Although the total room capacity in these resort areas remains small, it is growing at a rapid rate.

However, this is not reflected in room occupancy rates, which have actually declined in these two areas, and which remain low in comparison to the other resorts. However, occupancy rates have declined across the board, with the single exception of Montego Bay (which incidentally had the lowest level of increase of room capacity over this time period). Room occupancy in Montego Bay rose from 59.6% to 62.8% between 1990 and 2000, whereas it declined in Ocho Rios (70.3% to 59.3%), Negril (68.6% to 63.9%), Port Antonio (23.2% to 17.3%), Kingston and St Andrew (52.4% to 45.1%), and Mandeville and the South Coast (40.4% to 38.3%). This therefore suggests that the resort areas of Port Antonio and Mandeville and the South Coast are doing well – as they have absorbed a relatively large increase in room capacity with only a small decline in room occupancy. In contrast, Ocho Rios has experienced only a moderate increase in room capacity, but has experienced the greatest drop in room occupancy rates.

But which types of hotel are being most successful? It appears that hotels of all sizes and types are suffering from declining occupancy rates, with the single exception of the very largest hotels (with more than 200 rooms) (Table 3). However, it is the smallest hotels which suffered the greatest decline in occupancy over this period – with the *Daily Observer*'s headline of 5/12/95 being particularly prescient: “Tough times ahead for non all-inclusives” (p5). Both all-inclusive and other hotels experienced a decline in occupancy over this period, but the non all-inclusives fared considerably worse. It appears that, for the moment at least, large all-inclusive hotels are still ‘kings of the castle’. However, many of the developments in the Port Antonio and the Mandeville and South Coast resorts are among these smaller hotels, and as these resorts experience lower occupancy rates it may be an issue of location rather than hotel size.

Table 3: Percentage Occupancy Rates for different sizes and types of hotels, 1990-2000

	1990	1995	2000
less than 50 rooms	50.0	47.1	36.9
51-100 rooms	48.8	44.6	41.6
101-200 rooms	75.4	67.4	65.0
more than 200 rooms	65.4	66.7	68.9
all inclusives	83.3	76.6	70.0
other hotels	54.8	51.6	39.3

The Propaganda of Postmodernity: representations of Jamaica's tourist industry in the media and advertisements

As hinted above, the figures do not tell the full story. According to hotel operator, Diana McIntyre-Pike (quoted in the *Daily Gleaner*, 20/4/98):

Some persons believe that tourism is only room occupancy and that you are doing well if you are able to full [sic] up a hotel. But it is not necessarily getting the revenue because a lot of the hotels have had to cut rates all over the island.

However, flexibility in room occupancy rates can also have important implications for the workers employed in these hotels, as the burden of flexibility is often borne primarily by these staff. Although they may not become entirely unemployed, many of these staff earn a substantial portion of their wages through tips, and the knock-on effects to the local informal sector can also be severe.

The phrase ‘community tourism’ has appeared frequently in Jamaican newspapers, which suggests that this form of ‘new’ tourism is becoming increasingly prevalent, particularly on the south coast. The *Sunday Observer* (23/03/97) observed that “community tourism takes root on the south coast”, and contrasts the high security regimes of traditional hotels with the open gates and lack of security guards at some of the new south coast facilities, whereas the *Daily Gleaner* (02/10/00) stated that “community tourism is key”. Various other ‘alternative’ tourisms are also being developed around Jamaica. The *Daily Observer* (01/08/01) reported a plan for a 124 room ‘health tourism’ hotel in Long Bay, Portland – a type of alternative tourism which can be added to the 25 already identified by Mowforth and Munt (1998), a list which goes from academic tourism to wildlife tourism.

There is also plenty of interest in Jamaica in the travel pages of the British broadsheets. A search of the *Guardian*’s travel pages shows that since 1999 these have contained no fewer than ten articles about travel to Jamaica⁴. Five of these were in the “I lost my heart in...” series, in which celebrities write about a place which they have visited with special significance to them. Two of these referred generally to Jamaica, whereas the others specified Oracabessa, Negril, and Port Antonio as the particular locations in which they had “lost their heart”. Whilst these destinations are not the biggest tourist destinations of Montego Bay and Ocho Rios, they are all mainstream destinations (with the possible exception of Oracabessa, although this town is only 20 minutes drive east of Ocho Rios).

The other stories, which fit more into the profile of ‘professional’ travel writing, have a somewhat different profile. Three of the five refer specifically to Chris Blackwell’s *Island Outposts* group of hotels, which include *Jake’s* (with recent visitors including Robbie Williams and Lennox Lewis), *Goldeneye* (the former retreat of James Bond creator Ian Fleming), and *Strawberry Hill* (a former coffee plantation in the Blue Mountains). All of these are small hotels – *Jake’s* has 13 one-bed cottages, and *Strawberry Hill* has 12 villas. Whilst this level of coverage is obviously at least partially due to Blackwell’s superb grasp of the art of promotion, it also indicates that these are the types of developments of interest to the western press – and by extension to their generally affluent, middle-class readers.

Another article (17/02/01) refers to similar properties such as the *Rockhouse* in Negril, which also boasts “chic but simple cottages” with four poster beds and outdoor showers. In order to avoid the “dreaded package holiday all-inclusives”, the author suggests that “the answer for the tourist is to go to extremes – rough it or spend top dollar”. The general impression gained from this coverage in the British press is a move away from mass tourism, towards a more customised vacation. Several of the articles also stress the various dichotomies observed by the authors, both in terms of the Jamaican society and of the types of resorts and vacations available.

Postmodern tourists or Postmodern tourism?

I have been deliberately vague about the definition of postmodernism which I have used. This is mainly because of the vagueness of the concept itself, although I would agree with the general definition of scepticism towards the grand claims of the modern era, and a focus instead on the socially constituted, contingent, and partial nature of interpretations with a consequent openness to a range of voices and perspectives. As a more general statement, I would suggest that “in an important sector of our culture there is a noticeable shift in sensibility, practices and discourse formations which distinguishes a post-modern set of assumptions, experiences and propositions from that of a preceding period” (Huysmans 1984 quoted in Harvey 1990).

However, simply noting a change in the pattern of tourism is not in itself a necessary or worthwhile aim – fashions change, and people choose spend their money in different ways. It is outside the scope of this paper to assess whether the changes in Jamaican tourist developments are indicative of some greater social, political or economic change. However, rather than simply using the definition given by Moe the Bartender in *The Simpsons*, who suggested that postmodern means “weird for the sake of weird” (a statement which is self-evidently true for anyone who has seen the grandiose monuments of the larger all-inclusive hotels) the question of postmodern tourism is of relevance in assessing the direction in which the industry is going and the likely impact of this on Jamaica’s economy.

Potter and Dann (2000) have written about some aspects of the postmodern tourist in the Caribbean (in this case, Barbados), which by use of some ambitious alliteration they have categorised as peddling paradise, commoditizing culture, hawking heritage, playful placelessness, and blurring boundaries. Whilst these are all clearly evident in the tourist experience, I would suggest that it is difficult to identify a previous form of the ‘modern’ tourist. Since its very beginning tourism has been “perhaps the most noteworthy single example in modern times for consumers... to devote a large proportion of their total resources to economic services, as distinct from goods” (Ogilvie 1933). In this respect, it could be argued that the experience of mass tourism has been a pre-condition of the movement which we choose to call ‘post-modernism’. However, in this paper I am more interested in examining the product consumed by tourists – that is, tourist development rather than tourist motivations, although the two are obviously closely linked. Whilst the motivations of the tourist appear to have been ‘postmodern’ long before the term came into use, the destinations which they ‘consume’ do appear to have shown change from a ‘modern’ (Fordist) phase to a ‘postmodern’ (post-Fordist) era.

Although from an ideological perspective I prefer to fly Air Jamaica between London and Kingston, I sometimes end up on a cheaper ticket on an alternative airline which I will not advertise here. The airline have recently changed the hotel in which their crew stay in Jamaica, to the newly built 430-room *Ritz-Carlton* east of Montego Bay. One of the cabin crew confided to me that one of the best aspects of this was that the hotel was exactly the same as one at another of their Caribbean destinations, so they didn't have to make any adjustments when they flew to Jamaica or there. In one respect, this is typical of the modernist regime of mass production, although the exclusivity of the product precludes mass consumption. However, the increasingly placeless character of developments such as this exhibits a more postmodern character in which the surface representation is of greater importance than the actual situation. Indeed, it agrees with Erik Cohen's (1995) assessment of post-modern 'contrived' attractions, in which tourists "seem to care less for the origins of an attraction as long as the visit is an enjoyable one" (p16), and "if the culturally sanctioned mode of travel of the modern tourist has been that of the serious quest for authenticity, the mode of the post-modern tourist is that of playful search for enjoyment" (p21).

It could also be suggested that the ever-increasing numbers of cruise ships also represent this mode of tourism. Whereas the first warm-weather cruise ships of the 1970s were less than 20,000 tons and had capacity for about 700 passengers, the newest ships are now over 100,000 tons and carry upwards of 3,000 passengers; and the cruise lines are committed to building more than 35 new ships between 1999 and 2004. These ships provide a tropical island vacation without the need for an island (some of them are even fitted out with wedding chapels and fake waterfalls), and in this sense are the zenith of simulation. They also eliminate all of the 'inconveniences' associated with staying in a foreign country, such as a native government and population.

This concern for an aesthetic enjoyment of the surface can also be seen at the opposite extreme of the hotel sector. Traditionally in Jamaica, rooms were offered either in hotel blocks or in villas, although there now appears to have been an upsurge in what I shall term 'micro-villas' – hotel rooms which stand on their own as small cottages. One example of this is the previously mentioned *Jake's*, best described by Andy Pietrasik in the *Guardian* (23/03/02) (Figure 2):

The rooms are all individually styled and basic but comfortable on the inside... The cottages are a riot of colour: blues, pinks, lavenders and ochres. One of the buildings has a Moorish look with a domed roof and cloth or brushwood awnings, others are Gaudiesque with their mosaic and tiling, and the Caribbean is represented by the painted tin roofs and hammocks in the trees.

Another part of the marketing strategy for *Jake's* involves dwelling on its location in Treasure Beach, described by the resort's own brochure as "a small fishing village on Jamaica's undeveloped South Coast". The *Jake's* formula is also strikingly effective – it boasts an extremely high occupancy rate (these figures are difficult to obtain, although word of mouth and the difficulty of making a reservation tend to confirm this observation), as well as the ability to charge luxury hotel rates for accommodation which does not include phones, TV or air-conditioning. A similar regime can be seen at *The Rockhouse* on the less-developed 'cliff' side of Negril, which was described in the *Guardian* (17/02/01) as "everything that's great about New York boutique-style hotels with none of the attendant attitude".



Figure 2: The Moroccan influence at Jake's in Treasure Beach (photo by the author)

These two aspects: an undeveloped location, and a plethora of different styles and influences, do reflect some of the qualities associated with ‘postmodernism’, particularly with regards to the level of ‘authenticity’. It is difficult to argue that the experiences gained at *Jake's* are any more ‘authentic’ than those at the new *Ritz-Carlton* – both are highly contrived to pander to the demands of the paying guests. However, they both produce a kind of existential authenticity, in which the authenticity is that which enables the individual to “resist or invert the dominant rational order” of modernity (Wang 1999: 361).

To link briefly with global trends, the search for these new forms of vacation can be seen to be associated with notions of habitus for the new middle classes in the western world. Whilst what Mowforth and Munt (1998, see pages 133-134) identify as the new bourgeoisie have high levels of economic and cultural capital, the new petit bourgeoisie do not have the economic clout but seek to obtain cultural capital from their vacations. This new petit bourgeoisie must differentiate themselves from the working classes below (mass packaged tourists), and the high spending bourgeois middle classes above. In summary, therefore, two different types of ‘postmodern’ development can be identified. One of these is epitomised by the *Ritz-Carlton* hotel. This type of large-scale, luxury development is symbolic of economic capital, and is characterised by simulation. *Jake's* and similar small-scale, ‘chic’ developments represent the second of these – symbolic of cultural capital, and characterised by reproduction and pastiche.

Conclusion

There are obviously major changes taking place in the nature of tourist developments in Jamaica (and indeed the rest of the world), along with the distinct sense that the travelling public is now “in search of something ‘new’” (Smith and Eadington 1992: 6).

These changes, and the future of the industry, appear to be taking place at both edges of the traditional hotel-based vacation. On one side, the large resorts and cruise ships are increasingly simulations rather than originals, and are involved in peddling paradise, commoditizing culture, hawking heritage, playful placelessness, and blurring boundaries. On the other side, smaller properties in more intimate surroundings represent the post-Fordist mode: in which individuality and character are perceived as more important than mass-produced consistency, in which place becomes more important than space, in which reproduction, pastiche and eclecticism are increasingly valued, and in which individuality is prized above all (Harvey 1990). It is for the people who choose to associate with the latter that the term ‘tourist’ is becoming more and more pejorative in its associations. In some ways this suggests that the tourist industry has come full circle, as before the 1930s the term ‘tourist’ was usually depreciatory (Ogilvie 1933), although it began to become accepted at about that time.

Perhaps the most striking portrayal of a postmodern perspective to Jamaican tourism is given by the author Chris Salewicz in his explanation of how he lost his heart in Port Antonio (*Guardian* 02/12/00). For him, “visually, sensually and spiritually, Jamaica is magic realism made real”. Magic realism involves treating the fantastic as normal, or including mythical elements in a seemingly realistic account. This strikes at the heart of the ‘authenticity’ debate, by suggesting that the tourist destination is constructed as a place in which anything can and does happen, and that the destination is in the eye of the beholder as much as in any more objective qualities.

There are more tourists spending more money in Jamaica than at any previous point in time⁵. These tourists are spending less time in the country, and a higher proportion of them are visiting on cruise ships rather than as stopover visitors. There are more rooms available than ever before, although the rate of room occupancy is declining islandwide. The hotels which are suffering the most from low occupancy rates are smaller hotels, and those which are not all-inclusive. In a 1998 overview, the Jamaica Tourist Board stated that highly packaged, destination based tourism is expected to continue to grow and to “attract the masses”, whilst experienced and wealthy travellers are expected to turn to “special interest” tourism. “Mass market tourism will continue to be important and is expected to grow, when it is considered that most North Americans are yet to travel to another country”.

However, the question remains: what sort of mass market? Many “mass market” tourists are likely to be extremely fickle in their choices, and are likely to make vacation choices with a high regard for financial cost. It appears that the sub-sectors within the industry that are currently successful are those at the margins of this traditional tourism – one extreme aiming at those tourists for whom economic capital is less of a constraining factor, and another aiming at those for whom the accumulation of cultural capital is a primary aim of a vacation. Thus far, spatial location has been an important aspect of developing these contrasting trends, with the North Coast (Montego Bay and Negril) and Port Antonio showing the best adaptations to the previous type, and the South Coast and Negril showing the best adaptations to the latter. These two modes, coupled with the continuing profitability of cruise shipping, do tend to suggest that the most promising types of tourism exhibit distinctive ‘postmodern’ tendencies. Although mass tourism may remain the ‘bread and butter’ of Jamaican tourism, it appears that long-term profitability may indeed depend on expanding the ‘postmodern’ margins of the industry.

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Special thanks to Alex Loftus for his insightful comments on a draft of this paper.

End Notes

¹ from Island Outpost publicity brochures

² Don’t take my word for this – *Vogue Magazine* (who should know about these things) proclaimed Jake’s to be “the chicest shack in the Caribbean”.

³ Unless otherwise stated, all figures are from the Jamaica Tourist Board’s comprehensive “Jamaica: Annual Travel Statistics”, published each year and available through the Tourist Board in Kingston.

⁴ Decca Aitkenhead 08/04/00; Jonathan Bouquet 17/09/00; Decca Aitkenhead 30/11/00; Amy Jenkins 17/02/01; Andy Pietrasik 23/03/02; “I lost my heart in...” 06/11/99, 02/12/00, 24/03/01, 26/01/02, 23/02/02

⁵ This statement needs to be qualified as a consequence of the September 11 attacks in 2001. However, although this had an adverse effect on the 2001-2002 tourist season, it appears that general trends of tourism growth are likely to have been set back rather than reversed due to this.

This paper was given at The Society For Caribbean Studies Conference held at The University of Warwick, 1st – 3rd July 2002

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