TOWARDS A MORE SUSTAINABLE TOURISM IN THE HISTORIC TOWN OF FALMOUTH, JAMAICA.

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Presentation Outline

- Objectives of the study
- Research questions
- Findings
- Recommendations
OBJECTIVE OF THE STUDY

TO DETERMINE WHETHER THE COMMUNITY OF FALMOUTH HAS BENEFITTED SIGNIFICANTLY FROM CRUISE TOURISM
RESEARCH QUESTIONS

✓ Has cruise tourism within Falmouth been accompanied by the necessary infrastructural development and social services?

✓ To what extent has the arrival of cruise ships resulted in significant benefits (expansion of business and improved standard of living and quality of life) to the residents of Falmouth?
SUMMARY STATISTICS ON CRUISE TOURISM

- Caribbean – Market share over 30% of the global
- Direct Expenditure – 5% of the global
- Global Expenditure – US$54.11B
- Caribbean - US$3.16B
- Jamaica – US$198M
- Caribbean employment of 7.8% of total persons
### SUMMARY STATISTICS ON CARIBBEAN CRUISE TOURISM

<table>
<thead>
<tr>
<th>Destination</th>
<th>Total Cruise Tourism (US$ M)</th>
<th>Total Employment</th>
<th>Total Employee Wage Income (US$ M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Maarten</td>
<td>422.9</td>
<td>9,259</td>
<td>189.1</td>
</tr>
<tr>
<td>Bahamas</td>
<td>373.1</td>
<td>7,954</td>
<td>138.5</td>
</tr>
<tr>
<td>Cozumel</td>
<td>365.5</td>
<td>9,727</td>
<td>61.0</td>
</tr>
<tr>
<td>U.S. Virgin Islands</td>
<td>344.3</td>
<td>6,397</td>
<td>141.0</td>
</tr>
<tr>
<td>Cayman Islands</td>
<td>207.6</td>
<td>4,454</td>
<td>87.0</td>
</tr>
<tr>
<td>Jamaica</td>
<td>198.6</td>
<td>7,067</td>
<td>46.1</td>
</tr>
<tr>
<td>Puerto Rico (San Juan)</td>
<td>198.2</td>
<td>5,209</td>
<td>75.0</td>
</tr>
<tr>
<td>Other Caribbean Destination *</td>
<td>1,047.10</td>
<td>24,983</td>
<td>238.8</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,157.3</strong></td>
<td><strong>75,050</strong></td>
<td><strong>976.5</strong></td>
</tr>
</tbody>
</table>
SUMMARY STATISTICS ON JAMAICA

Jamaica cruise passenger arrivals

<table>
<thead>
<tr>
<th>Port</th>
<th>2012 %</th>
<th>2013 %</th>
<th>2014 %</th>
<th>2015 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Falmouth</td>
<td>43</td>
<td>51</td>
<td>54</td>
<td>48</td>
</tr>
<tr>
<td>Montego Bay</td>
<td>29</td>
<td>19</td>
<td>17</td>
<td>24</td>
</tr>
<tr>
<td>Ocho Rios</td>
<td>29</td>
<td>30</td>
<td>29</td>
<td>28</td>
</tr>
</tbody>
</table>

Jamaica Cruise Passenger 2011 - 2015
<table>
<thead>
<tr>
<th></th>
<th>Large collection of Georgian style buildings</th>
<th>Port represents partnership between GOJ and RCCL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Port has its genesis in 2002 Tourism Master Plan</td>
<td>First Ship in 2011</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8,686 residents</td>
</tr>
</tbody>
</table>
DEMOGRAPHICS

- 28.5% of the population in rural areas live below poverty line
- Estimated youth population in Falmouth (15-24 years) = 16.9%
- Adults (25 years and older) = 58.1%
- 72% of HHH’s are unemployed
- 10% of HHH’s reported have been victims of crime in their lifetime

SDC, 2010
METHODOLOGY

Sampling

- Quota sampling used
- 250 residents surveyed
- 10 in-depth interviews conducted with stakeholders

To collect data a combination of:

- In-depth interviews
- Surveys
- Official statistics
- Observations

Field work done over 2 months
SECTORS IN WHICH RESPONDENTS ARE EMPLOYED

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not specify any...</td>
<td>16%</td>
</tr>
<tr>
<td>Volunteer</td>
<td>0.4%</td>
</tr>
<tr>
<td>Student</td>
<td>1.2%</td>
</tr>
<tr>
<td>Agricultural sector</td>
<td>0.8%</td>
</tr>
<tr>
<td>Informal sector</td>
<td>9.6%</td>
</tr>
<tr>
<td>Private sector</td>
<td>16%</td>
</tr>
<tr>
<td>Public sector</td>
<td>6.4%</td>
</tr>
<tr>
<td>Tourism sector</td>
<td>49.6%</td>
</tr>
</tbody>
</table>
Has cruise tourism within Falmouth been accompanied by the necessary infrastructural development and social services?
STATUS OF PLANNED INFRASTRUCTURAL DEVELOPMENT

Development of mini-parks: Ongoing
Creation of parking lots with green spaces: Ongoing
Restoration of Georgian style buildings: Ongoing
Use of the Elleston Wakelands Centre: Meetings being held
Relocation of fisherfolks: Temporary relocation took place

Attract at least 667,000 passengers per annum: Goal surpassed since 2014

Renovate Hampden Warf and Street scape Project: Project to start January 2018
There has been a rapid desecration of the historical buildings. Twenty-one and twenty-two Market Street, these were once beautiful tourism buildings, but are now destroyed. Nap notes that the designs of the buildings are being changed to build supermarkets etc.
THE RESIDENTS VIEW

"Government has abandoned Falmouth residents; a Cafe Style development was promised for the town but look at Falmouth today, you have smelly and blocked drains, poor walkways and sidewalks and you name it. Six years after the port has opened the town is yet to be declared a resort town" (Christie, 2017).
Residents of Falmouth have mixed views about the extent to which the community benefits from the Port.

Benefits are examined in terms of business expansion and improvement in standard of living and quality.

To what extent has the arrival of cruise ships resulted in significant benefits to the residents of Falmouth?
EXTENT OF COMMUNITY BENEFIT

N=250

- Community benefits: 64.8%
- Community does not benefit: 35%
When the tourists go to Ocho Rios and Montego Bay they often return a few minutes before boarding time ends; therefore, they are often unable to walk the town of Falmouth and spend their monies, as a result businesses are unable to expand.
EXTENT TO WHICH BUSINESSES HAVE EXPANDED?

- Yes: 39%
- Not sure: 19%
- No: 42%

N=250
EXTENT TO WHICH BUSINESSES HAVE EXPANDED?

“The visitors refuse to purchase the liquor from local stores because they prefer obtaining it duty-free from the shops in the port.” (Participant 18, 2017).

“Most mornings crew members from the ship dine at [this] eatery” (Sophia, 2017)
EXTENT TO WHICH STANDARD OF LIVING AND QUALITY OF LIFE HAVE IMPROVED

- Yes: 46%
- No: 21%
- Not sure: 33%

N=250
EXTENT TO WHICH STANDARD OF LIVING AND QUALITY OF LIFE HAVE IMPROVED?

“Some employees are now going back to school especially since they have flexible work hours, others have acquired new homes”.

“The authorities promised to fix the market and to date no market. People are forced to work longer hours to send their children to school, and while at it running away from the police.”
WHY HAS FALMOUTH FAILED TO DEVELOP AS WAS EXPECTED?

- Not enough attractions for visitors (24.8%)
- Tourists are taken to more mature locations (14.2%)
- Lack of interaction between locals and tourists (9.7%)
- Not enough jobs available for residents (8%)
- Persons from outside the parish benefitting (7.1%)
- Cruise ship offers pre-booked packages (6.2%)
- Benefits are one sided (6.2%)
# OPPORTUNITIES

| Better regulated environment and traffic to improve attractiveness. |
| Integration of heritage sites into the attractions. |
| Involvement of more locals in the tourism sector. |
| Better and more secure town making it highly attractive to long stay visitors. |
PROPOSED MODEL- CARTAGENA

Cartagena is a small historical area of Colombia that combines residential communities with tourism.

Inner Cartagena features:

- Pedestrianized areas
- Cultural attractions and performances which permit close interaction between tourists and locals
- Low cost hotels
- Excellent security
RECOMMENDATIONS

• Engage all stakeholders
• Increase community based organizations for negotiation purposes
• Need to diversify craft products
• Create more tourist attractions
• Implement Falmouth Development Plan
Thank you