

# JAMAICA

A woman with curly hair, wearing a pink and yellow wetsuit, a diving mask, and a regulator, is scuba diving. She is positioned in the center-right of the frame, looking towards the camera. To her left are two large, dark-colored fish with yellow and white speckled patterns on their bodies and yellow eyes. They are swimming in a clear blue ocean with various coral reefs visible in the background.

*Jamaica Tourist Board*  
**ANNUAL REPORT**  
*APRIL 2015 - MARCH 2016*

**ANNUAL REPORT**

**OF THE**

**JAMAICA TOURIST BOARD**

**APRIL 2015 – MARCH 2016**

# **JAMAICA TOURIST BOARD**

## **MISSION STATEMENT**

*“To develop and market the tourist industry  
so that JAMAICA remains  
the premier Caribbean tourist destination”*

## **VISION STATEMENT**

*“To be the most efficient and respected public sector agency,  
dedicated to the marketing of the destination  
and to enabling the tourism industry to achieve  
sustainable growth and development.”*

**ANNUAL REPORT  
APRIL 2015 – MARCH 2016**

## **JAMAICA TOURIST BOARD**

### **BOARD OF DIRECTORS**

**APRIL 1, 2015 – MARCH 31, 2016**

Mr. Dennis Morrison	-	Chairman of the Board
Mr. Paul Pennicook	-	Director of Tourism
Mrs. Nicola Madden-Greig	-	President of the Jamaica Hotel & Tourist Association
Mrs. Evelyn Smith	-	Former President of the Jamaica Hotel & Tourist Association
Mr. Wayne Cummings	-	Hotelier, Sandals Resort International
Mrs. Zein Issa Nakash	-	Vice President – Corporate Marketing and Environmental Affairs, SuperClubs
Ms. Carolyn Wright	-	Hotelier
Mr. Kevin Hendrickson	-	Hotelier
Mr. Noel Sloely, Jr.	-	Ground Transportation Executive
Mr. Marc Melville	-	Attractions Operator
Mr. Gordon Brown	-	Attorney-at-Law

#### **Resource Persons:**

Mr. Josef Forstmayr	-	Hotelier; Managing Director, Round Hill Hotel
Ms. Justine Henzell	-	Events Consultant

## **INTRODUCTION / OVERVIEW**

April 2015 marked the 60<sup>th</sup> Anniversary of the establishment of the Jamaica Tourist Board (JTB). Over this period, the JTB has played a significant role in the development of our industry and indeed the nation.

During 2015, a number of initiatives were undertaken to celebrate this anniversary. Some of these were:

- An exhibition that moved through the library services to all parishes
- A lecture series on the history, development and growth of the tourism industry in Jamaica
- Partners' recognition events, both here at home as well as in the major markets, and
- A staff recognition event which was a Long Service Awards luncheon held on December 8, 2015.

As the JTB celebrated this milestone anniversary in 2015, the organisation had to contend with a rapidly changing landscape in travel generally, as well as changes here at home. The most significant change which was taking place locally was the trend by hotels to move upmarket. A number of three-star properties that changed hands were closed and refurbished/upgraded to five-star category. This change in the profile of hotels was timely, in that the profile of leisure travelers, the vast majority of the visitors to Jamaica, has also been changing. The big trend in leisure travel at this time was for a "curated travel experience". This vacation is one that has a blend of meetings with locals, visits to historical and cultural sites, and a wide variety of cultural experiences. Jamaica is well positioned to offer all of these things.

The Jamaica Tourist Board collaborated with the industry - with the Jamaica Hotel & Tourist Association (JHTA) in particular – to ensure that the industry in Jamaica recognized and was embracing these changing trends. Other changes with which the industry had to contend were:

- The changing ownership of the distribution system, specifically more vertical integration of travel companies and consolidation among the OTAs (On-line Travel Agencies)
- The continued growth and the use of low-cost airlines
- The prominence of the internet and the explosion of social media
- and, most important for the JTB, the way in which consumers digest information.

### **ADVERTISING**

Research shows that consumers are changing the way they access travel information. Whereas consumers are expected to consume and digest an average of 90.8 hours of

information per week through 2019, the difference will be in the channels through which this information is consumed.

As Digital Media continued to increase, we moved away from the traditional television-centric approach to using a mix of digital, mobile, cinema and OOH (Out-Of-Home) strategy. We adjusted our media strategy from an over 70% TV plan to less than 50% TV and to over 38% digital. During 2015, we also reintroduced some print advertising, specifically to target the luxury segment.

The advertising plan was developed to make the best use of the limited resources and therefore be the most cost-effective plan possible.

## **PUBLIC RELATIONS**

In the case of Public Relations, we emphasized increased use of the internet and significantly increased the use of social media in our PR activities. In August 2015 we appointed Burson-Marsteller out of the United Kingdom as our public relations agency of record for the UK, Ireland and Northern Europe.

Both the advertising and public relations programmes in 2015/16 continued to be based on the theme “JAMAICA – The Home of All Right”.

After all, there is no place in the world like JAMAICA. There is no place more optimistic, more at peace and more alive. That is why JAMAICA is the Home of All Right.

All Right is many things. It is the spirit of the people, the aroma from the jerk shacks, the sound of the reggae and the vision of green hills peering down on blue water. All Right is the feeling you get only in JAMAICA. It comes naturally to us. It is who we are. That feeling that all is right in the world. And not a single place in the world does it better.

Why? Well, there is something special about this place; that something special is called **All Right** and this is the **Home of All Right!**

## **2015 PERFORMANCE**

Stopover arrivals for 2015 were 2.12 million, with all regions showing growth except for Canada and Latin America.

- The US was up 3.7%
- Canada was down 6.8%
- UK/Europe was up 7.0% (UK specifically was up 12.3%)
- The Caribbean was up by 6.0%
- Asia was up 12.7%, and
- Latin America was flat - +0.4%

**Overall performance for calendar year 2015:**

- Stopover arrivals of 2,123,042 increased by 2.1%
- Cruise passenger arrivals of 1,568,702 increased by 10.2%
- Total Arrivals of 3,691,744 increased by 5.4%
- Gross foreign exchange earnings estimated at US\$2.402 billion, an increase of 7.0%.
- The average hotel room occupancy rate was 69.0%.
- Total capacity in the accommodation (excluding closed rooms) sub-sector stood at 28,408 rooms, of which 21,454 were in hotels and another 6,954 in villas, guesthouses and apartments.



## **ADVERTISING ACTIVITIES WORLDWIDE**

**FCB**, formerly called FCB Garfinkel, remained the advertising agency of record for the Jamaica Tourist Board on a worldwide basis, operating under a contract covering the five-year period April 2012 to March 2017.

The following summarizes FCB advertising activities on behalf of the Jamaica Tourist Board for FY 2015/2016 in the United States, Canada and United Kingdom.

### **OVERVIEW**

2015/2016 saw a continuation of the JTB's evolution toward the use of increased digital vs. traditional media as well as the first full year of "Home of All Right" as the campaign supporting the JTB's tourism efforts. (The campaign's tagline was modified in late 2014 from "Get All Right" to "Home of All Right". Also, the TV executions were re-edited to be more energetic and more reflective of the new line. Print and digital were refreshed as well, going into the high season). Successful out-of-home efforts using the PATH train in New York were expanded to include the other major New York commuter railroads: the LIRR and Metro North. A small radio effort was also launched for the first time. Additionally, paid digital advertising was implemented year round for the first time.

Jamaica continued to be the #5/#6 spender among Caribbean competitors despite a small decrease in spending. Within this context arrivals continued to grow year on year 2%+, exceeding the Caribbean as a whole which experienced a 2.7% decline in visitors. The efficient use of more digital media has enabled the JTB to maintain impact and to evolve to be in line with travelers' expanded use of digital for planning and booking their trips, particularly in the U. S. Moving forward, efforts will focus on increasing Jamaica's rate of growth to be more in line with other larger Caribbean and emerging Caribbean destinations.

### **UNDERSTANDING "WHAT WORKS"**

The growth of digital media has enabled much more accountability in determining the impact of advertising. For example, we can measure percent of people who "click through" from our advertising to our website; we can determine which content is most interesting and engages site visitors most deeply on our website; we know which digital creative units perform best against different metrics as well as which placements are most successful in driving engagement in Jamaica. All told, the impact of these analytics has enabled FCB and Initiative to improve on a continuing basis the effectiveness and efficiency of our digital advertising approach. This work has been a major focus for 2015/2016 and we will continue to provide future learning, ensuring that the JTB has state of the art, cutting edge strategies and execution.



## **FURTHER DEFINING “HOME OF ALL RIGHT”**

JTB has challenged us to give more, deeper meaning to “Home of All Right”. We began that process in late 2015/early 2016 by creating a printed manifesto that conveys the breadth of meaning intended by Home of All Right---a full 360 degree experience spanning how all five human senses are uniquely pleased, excited, calmed and liberated when in Jamaica. We also created a video manifesto, based upon this work, to amplify further the meaning of the idea. We continue to refine this today.

### **USA**

#### **Television**

In Q4 2015, we aired the Home of All Right campaign in an all National Cable plan, moving away from DRTV, for 4 weeks during the period from Oct 19<sup>th</sup> to November 29<sup>th</sup>. Additionally, we were able to secure 4 extra weeks of presence through our unwired partner, Telamerica. In Q1 2016, the campaign continued for 3 weeks starting January 11<sup>th</sup>. Our 70% :15s/ 30% :30s plan, delivered 361 GRPs across a wide breadth of channels including CNN, ESPN, HGTV, Discovery, E!, FX, HGTV, FOOD, HLN, DIY, TLC, TBS, and History. Advanced TV was also introduced to amplify our base plan, increasing targeted reach by an incremental 12.9%. TV delivered 178,000,000+ A25-54 impressions.

#### **Digital Activity/Social Activity**

Digital activity focused on three verticals throughout Q2’15– display, native, and video. The campaign was geo-targeted to our priority markets including New York, Chicago, Philadelphia, Atlanta, Washington D.C., Boston, Baltimore, Miami, and the additions of Houston and Los Angeles. Activity centered around the content and audience targeting tactics with Amobee for standard display, with Native and Video being served via partners such as Thrillist, Selectable and Jun Group. Native is the merger of content and advertising in which the “content” is consistent with the platform on which it appears. In Q3’15, the campaign continued previous successes and added a native bridal partner, Tripelift, to reach Brides searching for honeymoon or destination wedding locations. Q4’15 plans added programmatic buying, with partner Cadreon. Programmatic is an automated method of buying which leverages user-behavior data through the smart learning of technology to most accurately and efficiently reach the Jamaica target audiences wherever they engage online. Q1’16 campaigns continued on Q4’15 successes and tested native content building with the endemic partner Matador Network which produced 5 editorial pieces ranging from travel specific content to bridal editorial.

### **Paid Search**

For 2015/16, we continued to use the national “always on” approach to extend reach beyond broad, general search terms to capture targeted, intent-based queries or increasingly present “long-tail” queries.

We secured presence and high visibility across all devices, capitalizing on rising mobile queries, heavying up during key seasonality including winter travel from the Northeast. The introduction of Google Display Network helped to increase awareness. Cost per click and click through rate were the metrics continually optimized toward top performing keywords. We saw a CTR of 2.2% (as compared to 1.7% in the previous year).

### **Out-of-Home Activity**

In January 2016, Jamaica continued its high impact transit plan for the second year in a row with a train takeover on three major suburban New York rail lines: PATH, Metro North, and LIRR, including exterior train wraps, brand car takeovers, and banners. Messaging incorporated vanity URLs of a promotion through Expedia to motivate consumers to book. The PATH takeovers continued throughout Q1. OOH earned 40,624,352+ A25-54 impressions.

A cinema campaign was also in market for 4 weeks starting October 19<sup>th</sup>, featuring the :30s spot in New York theaters which over-index against affluent Caribbean-intender travelers. Cinema earned 3,855,788 A25-54 impressions.

### **Print**

Unlike years past when print was limited to local regional circulation, we moved away from that into a National, integrated Time Inc. partnership including 8 print insertions running in Q3, Q4 and Q1, on premier titles Travel+Leisure, Departures, Food&Wine, and Fortune Executive Traveler. With this buy we also received 2 custom advertorials in Travel+Leisure. The digital extension ran on the T+L, Departures, and F&W sites and social platforms throughout the winter. Print alone garnered 26,551,000 A25-54 impressions.

### **Radio**

Through an integrated partnership with Iheart Radio in New York starting October 19<sup>th</sup>, Jamaica ran a campaign with on-air traditional radio (4 weeks), a digital streaming extension (11 weeks), as well as a traffic and weather sponsorship in which DJs read Jamaica copy (4 weeks). On-air radio delivered 20,000,000 A25-54 impressions, and the digital extension added another 2,712,500 A25-54 impressions.

### **CANADA**

Advertising was in market during the high season from October 2015 through January 2016. Activity consisted primarily of digital media in relevant site placements: weather and travel,

as well as on Facebook. In addition, cinema supplemented the buy to extend reach. All creative used Home of All Right branding with relevant contextual ideas such as “Feel your temperature rise” and “Feel your spirit lift as the plane lands”. Versus the previous year, digital display and cinema are incremental media.

### **Digital and /Social**

We used the Weather Network, in peak season due to “weather obsessed” target engagement. High impact ad units combined with weather triggers delivered “click through rates” exponentially higher than all other tactics. Large ad units (300x600) drove CRTs at 5x the industry benchmark. Weather Network was our best performing placement

We also employed placements in travel sites. Although contextually relevant, our display banners underperformed. Yet video assets outperformed in terms of driving to site with high video completion rates

In Paid Social, Facebook was a successful reach driver, with large efficiencies average CPCV of \$0.02

Overall delivery in digital was more than 7.9MM Impressions and CTR of 0.52%.

### **Paid Search**

Overall traffic increased by 30% with 51% of search traffic coming from users looking for Jamaica and other “Jamaica” related search terms.

- Users visited 2.36 pages on average and spend 1 minute and 23 seconds on site
- Mobile users showed much stronger intent to click on our ad copy, with overall mobile CTR almost doubling compared to desktop
- “Dominican Republic” competitive keywords drove the most traffic, indicating a higher overall search volume

Overall paid search delivery was more than 1.4MM Impressions and CTR of 1.11%.

### **Out-of-Home Activity/Cinema**

Cinema served as our sole OOH tactic. Our preshow campaign delivered an attendance of 3.1MM. We rotated 4 creative units with alternating end tags. In addition, lobby digital screens delivered 174,083 impressions. We also ran companion print in Cineplex magazine:

- 1 English Full Page ad with a circulation of 750,258
- 1 French Full Page ad with a circulation of 200,000

## **UNITED KINGDOM**

The UK had a very limited production and media budget in 2015/16 so every activation that took place had to work even harder to compete with Jamaica Tourist Board’s competitors

and to give people a convincing reason to choose Jamaica as their long-haul travel destination:

### **Print**

Most of the activity FCB Inferno developed for Jamaica Tourist Board in 2015/16 was executed in print media using the Home of All Right creative campaign. Throughout the year, we reached a different number of key UK audiences through this medium:

We developed 3 trade executions that were run in top UK and Ireland Travel Publications: Travel Weekly and Travel Business Directory.

We still targeted the core couples market with a placement in Thomas Cook magazine.

Lastly, we identified a new audience for the Jamaica Tourist Board - sports tour holidays. We created a tailored cricket ad and a more general sports ad. Jamaica is well-known for their sporting prowess in the UK, so building on this association could be a future area of growth.

### **Partnership**

FCB Inferno worked with Turtle Bay (a Caribbean restaurant group) to develop table cards, website, email and menu collateral for an in-store promotion giving Turtle Bay's customers the opportunity to win a holiday to Jamaica. The competition was a huge success with more than 77k entrants. Jamaica Tourist Board and the partner hotels that supported the prize were able to follow up with entrants with email communications.

### **Collateral**

FCB Inferno helped Jamaica Tourist Board develop a lot of collateral in the year 2015/2016 for various purposes. FCB Inferno designed both a diaspora brochure and a romance brochure in the style of the Home of all Right creative. They also developed designs for the White Affair Trophy and banners for the Jamaica Rewards website.

## **PUBLIC RELATIONS – THE AMERICAS**

**Finn Partners** remained the JTB's public relations agency of record for **The Americas (North, South & Central)**, operating under a contract covering the five-year period April 2012 to March 2017.

### **SUMMARY**

The following report provides an overview of Finn Partners public relations activities for the period April 2015 – March 2016 in support of the Jamaica Tourist Board's marketing efforts to keep Jamaica top of mind in the U.S., Canada and Latin American markets. The Agency has utilized a combination of traditional and non-traditional public relations tactics to increase awareness of Jamaica's vast and diverse tourism offerings.

### **Press Releases**

Finn Partners wrote and distributed **78** press releases, media alerts and photo caption releases.

- A range of topics were showcased including on-island festivals, events, trade shows and conferences, seasonal packages, product launches, marketing programs, spokespersons, social media efforts, awards and accolades.
- Relevant press releases were translated and distributed to U.S. Hispanic and Latin America media.
- A sampling of these releases include:
  - *Nine Ways to Spend Your Ninety Days of Summer in Jamaica*
  - *Jamaica Hails The King Of Sprint*
  - *Discover Jamaica's Top Destination Wedding & Honeymoon Trends At The 2015 Jamaica Bridal Expo*
  - *An Insider's Guide To Negril, Jamaica's Capital Of Casual*
  - *Spice Up Your Jamaican Vacation With Authentic Jerk Cooking Classes, Farm-to-Table Rastafarian Meals And Island-Wide Culinary Events*
  - *Positive Outlook For Jamaica's Winter Tourist Season*
  - *Edmund Bartlett Appointed Jamaica's Tourism Minister*

### **Press Trips**

The Agency organized **19 Group Press Trips** covering niche areas and supporting JTB-sponsored events such as Reggae Sumfest and JAPEx. Niche areas included bridal, culinary, music, history, arts and culture, blogger outreach, travel trade and more. A sampling of media outlets that were secured for group press trips included the following:

## Consumer

*Huffington Post, Runner's World, Food & Wine, V Magazine, Hearst, The Daily Meal, Vogue, USA Today, The New York Daily News, FabFitFun, Blackbook, Elle Canada, Billboard, Metro, Examiner, Brides, Women's Running, The Root, Refinery 29, Destinations Weddings & Honeymoons, Daily Mom, Philadelphia Sun, Upscale and many more.*

## Trade

*Travel Weekly, Travel Agent, TravelAge West, JAXFAX, Travel Pulse, Travelweek, Canadian Travel Press, Tourism Plus, La Agencia de Viajes, and Turistampa*

The team secured **8 Individual Press Trips**. A sampling of media outlets includes the following:

- *Chicago Tribune, Fox News, Toronto Star, Intelligent Travel, National Post, Globetrotting Mama, Canadian Living, Family Vacation Critic, Taking the Kids and more.*

## Promotions

Arranged **30 national and regional magazine, radio, television, online, and retail promotions**, partnering with airline and on-island hotel and attraction partners. A sampling of promotional media opportunities included the following:

- **Radio:** G98.7 Good Morning From Jamaica; WSSR-FM/WCCQ-FM Chicago; WMGQ-FM/Central New Jersey; WOFX-FM Cincinnati; WRIF-FM/Detroit; WATL/ WXIA Atlanta;
- **Retail:** GoodLife Fitness Center, Patty Day 2016 in Toronto, Jamba Juice
- **Print:** *Best Health, Vacation Express*
- **TV Broadcast:** Boots on the Beach, The Wendy Williams Show, Steve Harvey Show

## Advertorials

Drafted copy for **4 national, regional and trade advertorials** with outlets such as:

- *Classical Pursuits, Caribbean Today, PGA Golf Guide, Our Jamaica Meeting Planner Guide*

## Events

Finn Partners supported special events in the U.S. and Canada, as well as on-shore in Jamaica. A sampling of these events includes:

- Praise on the Beach, April 2015
- MoBay City Run, May 2015
- Diaspora Appreciation Reception, May 2015
- JHTA Annual General Meeting, May 2015
- Styleweek Jamaica, May 2015

- Caribbean Fashion Week, June 2015
- Caribbean Week New York, June 2015
- Reggae Sumfest, July 2015
- Shaggy “Today Show” live performance & Twitter Chat, July 2015
- U.S. Open Taste Of Tennis, August 2015
- IAAF in Beijing, August 2015
- Jamaica’s Promotional Day at Yankee Stadium, August 2015
- Jamaica Bridal Expo, September 2015
- Reggae Marathon, December 2015
- Diaspora Media Holiday Reception, December 2015
- One Love Rewards ‘White Affair’, December 2015
- Bacchanal/Jamaica Carnival, January 2016
- Rebel Salute, January 2016
- New York Times Travel Show, January 2016
- Reggae Month, February 2016
- Jamaica Patty Day, February 2016
- Commuter Van & Port Authority Trans-Hudson (PATH) Activation in New York City, March 2016
- Kingston City Run, March 2016

### **Major Broadcast Initiatives**

- *Wendy Williams* (February 2016) – Jamaica was featured as the Hot Tropics Giveaway for a month-long on-air promotion with live and pre-recorded exposure as well as logo presence on the prize wheel. Wendy to provide at least 4 live hits encouraging entry. Moon Palace Jamaica Grande was the accommodations partner. 11 winners were selected; JTB was responsible for 10 trips.
- *Steve Harvey Show* (April 16, 2015) – Anniversary Game; JTB partnered with Hilton Rose Hall to offer a grand prize trip to Jamaica to the winners of the segment.
- *Chasing the Sun* (June 21 – 28, 2015) – Save Your Days Films filmed an episode of ‘Chasing the Sun’ TV series in Jamaica; the episode will feature a diverse mix of cultural, eco-tourism and sports-related experiences targeting Millennials and also feature interviews with Jamaican personalities.
- *Let’s Make a Deal* – Partnered with Sandy Haven, Foote Prints in the Sand and Holiday Inn to supply trip giveaways.
- *Wheel of Fortune* – Partnered with Grand Bahia and Holiday Inn to supply trip giveaways.



## **Special Events and Projects**

### **Diaspora Appreciation Reception**

The JTB partnered with the Norman Manley International Airport (NMIA) to host a reception in New York City for the Diaspora community. The reception, held in midtown Manhattan on Wednesday, May 13, 2015, was organized as a thank you for members of the Diaspora community, who play an important role in boosting tourism to Jamaica's capital city, Kingston. A number of travel partners including representatives from airlines that service Kingston: Caribbean Airlines, Delta, Fly Jamaica Airways, and JetBlue participated in the event. During the evening, airline partners had the opportunity to promote special summer packages, provide travel incentives and distribute information about the airline's offering to Kingston.

### **Caribbean Week NYC**

Finn Partners and JTB representatives were present at a variety of Caribbean Week in New York events including: Media Marketplace, Caribbean Awards Luncheon, Romance Pavilion, and chef demonstrations at Williams Sonoma and Bloomingdale's. In addition, to celebrate the JTB's 60th Anniversary, Finn Partners planned and coordinated two special events during the week: a cruise around NYC Harbor for travel agents and trade partners as well as the Sunset Jammin' Consumer event in Brooklyn Bridge Park. Tourism Director Paul Pennicook, Deputy Director Donnie Dawson and Regional Directors Tony King and Janice Allen were among the JTB executives in attendance at the major events. Agency provided on-site support during the week's activities and ensured Jamaica branding was visible at all events.

### **Shaggy Twitter Chat**

In support of Shaggy's TODAY Show performance on July 7, 2015, Finn Partners coordinated a Twitter chat co-hosted by Shaggy and the JTB on July 6. The team drafted the script and tweeted on behalf of Shaggy (@direalshaggy) and the Jamaica Tourist Board (@visitjamaicanow). The one-hour chat garnered 160,255 hashtag impressions (#JamaicanMusic) and 674,382 handle impressions for @VisitJamaicaNow.

### **Jamaica Promotional Day at New York Yankees**

Finn Partners secured a multi-faceted program with the New York Yankees, which included partnering with Palace Resorts to organize a day-long event featuring two VIP suites, Jamaica reception in the SAP Lounge and Delta Lounge for media and travel agents. Finn Partners secured radio giveaways with Z100 in New York City as well as select Diaspora radio stations. The Agency also worked with Palace Resorts to design a social media giveaway where participants won tickets to the game and a chance for a grand prize trip to the Grand Opening of the Moon Palace Jamaica Grande. JTB District Sales Manager Marcia Sinclair was on-site at in the SAP Lounge, delivered a welcome speech and participated in the photo

opportunity at home plate. JTB Business Development Managers Kenton Senior and Christopher Dobson were also on-site at the Great Hall Kiosk signing patrons up for a trip giveaway and at the Delta Lounge providing information for consumers, media and travel agents. The first 18,000 attendees received a Jamaica and Moon Palace Jamaica Grande branded canvas beach bag.

### **IAAF World Championships**

To capitalize on the victories of Jamaica's track & field team at the IAAF World Championships in Beijing, Finn Partners prepared quotes on behalf of the Honorable Minister of Tourism and Director of Tourism, drafted and distributed photo captions and press releases, and prepared creative social media posts to engage fans worldwide. Finn Partners also worked with freelance photographer Errol Anderson to secure athlete images from the Championships.

### **U.S. Open Taste of Tennis**

JTB sponsored the Home of All Right Lounge at Taste of Tennis at the W Hotel in New York City, a culinary event to unofficially launch the US Open (Tennis) tournament. Nationally renowned celebrity chefs and athletes were in attendance. The Agency drafted the media invite and secured the following ten (10) media to attend: *Daily Meal*, *Thrillist*, *xoJohn*, *NY Daily News*, *Ebony*, *Vetta Magazine*, *Epicure & Culture*, *Yahoo!*, *Forbes*, and *the Weekly Gleaner*. In addition, Finn Partners provided on-site support, coordinated goody bags, and liaised with photographer. Partners present in the experiential lounge included: Secrets Resorts and Appleton Rum. Secrets gave away two trips - one to a CitiGold lounge guest (\$5M and up net worth) and the other to the general attending public.

### **Radio Remote Program**

Agency worked with Delta Vacations and Moon Palace Jamaica Grande to coordinate promotion elements with Clear Results for a 10-market remote program. Cities included Atlanta, Baltimore, Cincinnati, Denver, Detroit, Indianapolis, Minneapolis, New York, Salt Lake City and St. Louis. Agency also facilitated meet and greet for radio staff and guests, worked with all partners to coordinate on-island itinerary including visits to Dunn's River Falls, Prospect Plantation, Chukka Caribbean Adventures and Miss T's and coordinated on-air interviews for client and partners.

### **Diaspora Public Affairs Campaign**

Finn Partners executed the Christmas 2015 flight of the *Home of All Right* Diaspora public affairs campaign. The campaign utilized radio and print advertising in the key Diaspora markets: New York tri-state, Washington, D.C. tri-state, Florida, Atlanta, New England and Toronto. During this phase of the campaign, we also utilized a grassroots/guerilla media approach - that of a commuter van outreach which was implemented in Brooklyn for a 6-8 week period.

### **Jamaica Patty Day**

Agency promoted Patty Day 2016 in Toronto through media and social activations including a “patty drop” to local media, hosting a consumer “Patty Party” at the Drake Hotel downtown (February 22) and Facebook trivia postings. Over 200,000 consumers were reached through social media without advertising.

### **PATH Station Activation**

To leverage the “Home of All Right” ad-buys inside and on the exterior of New Jersey PATH trains, the Agency planned and staged an on-site event on February 25 at the 33<sup>rd</sup> Street station in New York, and implemented a social media giveaway from February 25 – March 7. Finn Partners coordinated the on-site elements with the PATH team, drafted a press release announcing the activities, conducted media outreach, secured a hotel partner, and prepared social media postings for Facebook and Twitter. District Sales Manager Marcia Sinclair, as well as Business Development Managers Chris Dobson and Kenton Senior, were on-site distributing Jamaica materials including All-Inclusive Outlet flyers with Jamaica vacation offers.

### **Written Materials**

- Produced, designed and distributed quarterly eNewsletters *Home of All Right* and *Meet You in Jamaica* to travel specialists, media, and MICE market in the U.S. and Latin America.
- Submitted PR recommendations for President Obama’s visit to Jamaica, March 2015
- Submitted PR plan for Caribbean Week New York, June 2015
- Prepared nominee letters for the winners of the Marcella Martinez and Marcia Vickery-Wallace awards during Caribbean Week New York 2015
- Submitted PR plan in support of Shaggy “Today Show” live performance & Twitter Chat, July 2015
- Submitted event and PR plan for New York Yankees activation in partnership with Moon Palace Jamaica Grande, August 2015
- Prepared congratulatory letter to Marlon James, winner of the Man Booker Prize for Fiction for “A Brief History of Seven Killings,” on behalf of Director of Tourism, October 2015
- Submitted PR plan in support of Reggae Month events, February 2016
- Submitted PR plan in support of Paradise Lost EDM Festival, February 2016
- Submitted PR plan for Jamaica Patty Day, February 2016
- Submitted event and PR plan for the Commuter Van & Port Authority Trans-Hudson (PATH) Activation in New York City, March 2016
- Submitted thought leadership campaign for Minister Bartlett, March 2016

- Conducted daily media monitoring as well as special monitoring based on current or special events such as the Zika Virus, U.S. Missionaries Incident, Ocho Rios Bus Accident, and more
- Prepared letter to industry partners and to JTB staff on the state of the Zika Virus
- Prepared PR recommendations, statement and suggested media Q&A for Minister of Tourism on the incident with U.S. missionaries
- Prepared a comprehensive report on the outcomes and next steps from the various division meetings, including education, healthcare, voluntourism, Jewish heritage and media interviews
- Drafted remarks and corresponding PowerPoint presentation for the Director of Tourism for the JHTA Annual General Meeting
- Wrote destination copy and profile for World Routes Conference
- Prepared speaking points for Deputy Director of Tourism Sandra Scott for Bridal Expo
- Prepared message for Tourism and Entertainment Minister Hon. Dr. Wykeham McNeill, for TV Broadcast to mark the 2015/2016 Winter Tourist Season

## **Jamaicans Overseas Support**

- American Friends of Jamaica (AFJ) annual gala
- Children of Jamaica Outreach (COJO) Annual Scholarship Gala & Awards
- American Foundation for the University of the West Indies (AFUWI)
- Braata Productions
- Union of Jamaica Alumni Associations (UJAA)

## **Select Placements/Highlights**

### **Bridal**

- *Destination Weddings & Honeymoons*—August 2015—“5 Things We Love: Jamaica”
- *Once Wed*—October 21, 2015—“Start Planning Your Dream Destination Wedding with Hyatt Zilara in Jamaica”
- *Pretty Pear BRIDE*—December 2015—“Looking for Heaven on Earth? Honeymoon in Jamaica!”
- *BRIDE*—March 1, 2016—“Jamaica Getaway: Honeymoon Ideas for the Trip of a Lifetime”
- *Destination Weddings & Honeymoons*—March 2016—“Hot Destinations for 2016”
- *Martha Stewart Weddings*—January 29, 2016—“Bartenders Reveal Their Best Hangover Cures-Dougie’s Bar at Jakes Treasure Beach in Jamaica”

### **Culinary**

- *New York Daily News*—July 21, 2015—“From Festival to Jerk Pork: Where to Find the Best Jamaica Grub”

- *Food & Wine*—September 1, 2015—“The Best Caribbean Restaurants for People who Take their Food Pleasure Seriously”
- *Saveur*—October 2015—“Jamaica: How a Music Industry Icon and a Crop of Visionary Farmers are Revitalizing the Island’s Homegrown Food Scene”
- *The Daily Meal*—November 13, 2015—“Explore Jamaica’s Culinary Scene and NyamJam Festival”
- *Eat, Drink, Travel*—January 13, 2016—“Six Fabulous Foodie Experiences in Jamaica”
- *Sherman’s Travel*—January 29, 2016—“5 Foodie Favorites in Kingston, Jamaica”

## **Family**

- *MiniTime*—July 17, 2015—“Five Land and Water Adventures in Jamaica for Outdoorsy Families”
- *Travel Pulse*—September 2, 2015—“Family Fun at the Jewel Runaway Bay Resort”
- *Taking the Kids*—“January 18, 2016” —“A Private Villa in Jamaica with a Homey Feel and Lots of Space”
- *Family Vacation Critic*—February 27, 2016—“Editor’s Review of Hyatt Ziva Rose Hall”
- *Traveling Mom*—February 27, 2016—“Making the Most of a Port Day in Ochos Rios with Paradise Travels Tour Guides”
- *Today’s Parent*—February 29, 2016—“Caribbean Cool-Franklyn D. Resort, Jamaica”

## **General Travel**

- *USA Today*—April 14, 2015— “Only in Jamaica: 10 Can’t Miss Experiences”
- *About*—May 20, 2015— “11 Off-the-Beaten-Path Adventures in Jamaica”
- *AFAR*—August 10, 2015—“Where to Stay, Swim, and Eat Off the Beaten Path in Jamaica”
- *Recommend*—October 2015—“JAPEX: Parts 1 and 2”
- *Orbitz*—December 8, 2015—“The Absolute Top 10 Coolest Things to Do in Jamaica”
- *Fodor’s Travel*—February 19, 2016—“10 Things to Do in Jamaica This Winter”
- *Travel + Leisure*—March 20, 2016—“Best Beaches in Jamaica”

## **Music**

- *Billboard*—June 11, 2015— “Rave, Rap and the Remix: The Jamaican Sound System’s Influence on Popular Music”
- *CMT News*—June 26, 2015— “Chris Young Goes to Jamaica on *CMT Hot 20 Countdown*”
- *Forbes*— July 1, 2015— “Reggae, Roots & Luxury: Caribbean Music Festivals Paired with Plush Accommodations”
- *Men’s Journal*— December 10, 2016— “Chase Summer All Winter Long”
- *The New York Times*— January 10, 2016— “Where Music Lovers Should Go in 2016”

## **Sports**

- *Women’s Running*—April 3, 2015— “Running Off to Jamaica”

- *We Blog the World*—December 16, 2015— “Wellness Travel: Where to Get Your Yogi On Along the Jamaican Coast”
- *The Active Times*— February 8, 2016— “Hot vs. Cold: Valentine’s Day vs. President’s Day”
- *Yoga Journal*— February 17, 2016— “11 Yoga Retreats You Can Actually Afford”
- *FabFitFun*— April 6, 2016 — “Why Jamaica is the Hottest #Fitcation Spot Right Now”
- *Outside Magazine*— March 1, 2016— “The 28 Best Trips of 2016”

## **Trade**

- *Prevue Meetings*—August 11, 2015— “The Caribbean”
- *Recommend*— December 1, 2015— “Trending Now in the Caribbean”
- *Travel Pulse*— February 1, 2016— “3 Caribbean Festivals You Don’t Want to Miss”
- *Travel Agent Central*— February 4, 2016— “Taking the Kids—And Meeting the Locals in Jamaica”
- *Incentive Travel & Corporate Meetings*— February 25, 2016— “Marcia McLaughlin Heads Jamaica’s Marketing Department”
- *Travel Weekly*— March 15, 2016— “Bartlett to Take a Hard Look at Jamaica Strategies”

## **Canada**

- *WestJet Magazine*— April 30, 2015— “Chef Insider: Brian Lumley”
- *Yahoo! Canada*— May 26, 2015— “World’s Best Street Food Spots”
- *CP 24*— June 15, 2015— “Rock Out, Eat, and Dance, and Eat Some More at Jamaica’s Jamrock Summer Event”
- *Elle Canada*— August 5, 2015— “5 Must-See Move and Music Hotspots in Jamaica”
- *The Toronto Sun*— November 4, 2015— “10 Luxury Resort Escapes For Winter”
- *Food Network Canada*— November 5, 2015— “10 Foods You Absolutely Must Try in Jamaica”
- *Destination Weddings & Honeymoons*— February 25, 2016— “A Perfect Day in Montego Bay”

## **Hispanic**

- *Latina* – August 26, 2015 – “Must-See Pics: Aaron Diaz & His Familia Soak Up The Jamaica Sun”
- *Hombre* – October 20, 2015 – “Jamaica’s Spooktacular Attractions”
- *SC Latina* – October 21, 2015 – “Explore Montego Bay – Jamaica”

## **Latin America**

- *Entorno Inteligente* – April 1, 2015 – “Descubra La Costa Sur De Jamaica”
- *Diario de Los Andes* – May 4, 2015 – “JAMAICA ALL RIGHT”
- *A tribuna* – June 5, 2015 – “Escapada romântica para a Jamaica, que tal?”

- *O Globo* – October 22, 2015 – “O Som Do Reggae E O Sabor Do "Jerk" Nas Praias Da Jamaica”
- *El Nacional* – January 5, 2016 – “Jamaica empieza el año con reggae”
- *El Patagónico* – March, 13, 2016 – “La gran fiesta de Jamaica”

#### Other

- *Associated Press*—March 15, 2015— “Jamaica Hopes Jewish Tourism Can Help Fading Community”
- *The Tonight Show with Jimmy Fallon*—April 23, 2015— “Tonight Show: Shaggy Off”
- *NBC’s Today Show*—July 7, 2015— “Shaggy Live!”
- *U.S. News & World Report*—October 15, 2015— “9 Beach Destinations to Visit This Winter”
- *InStyle*— November 8, 2015— “Visit Where James Bond All Began”
- *Bravo! TV* — December 22, 2015— “Flee Winter (And Crowds!) at These 5 Under-the-Radar Caribbean Island Destinations”
- *Fox News*— February 5, 2016— “Program Lets Tourists Hang with the Locals in Jamaica”
- *Conde Nast Traveler*— March 1, 2016— “Where to Relive ‘The Bachelor’ in Jamaica (Tears Not Included)”
- *The New York Times*— March 31, 2016— “Jamaica, Beyond the Beach”

#### Media Impressions

Total media impressions by region are as follows:

- United States: **1,360,587,325**
- Canada: **112,059,841**
- Latin America: **168,618,899**
- **Total Impressions: 1,641,171,265**



## PUBLIC RELATIONS – UK / IRELAND

The public relations agency review which was conducted by the JTB in 2015 in accordance with Government's procurement regulations led to the appointment of **Burson-Marsteller** as the JTB's Public Relations Agency for the **United Kingdom and Ireland**, for the three-year period July 15, 2015 to July 14, 2018.

### Introduction

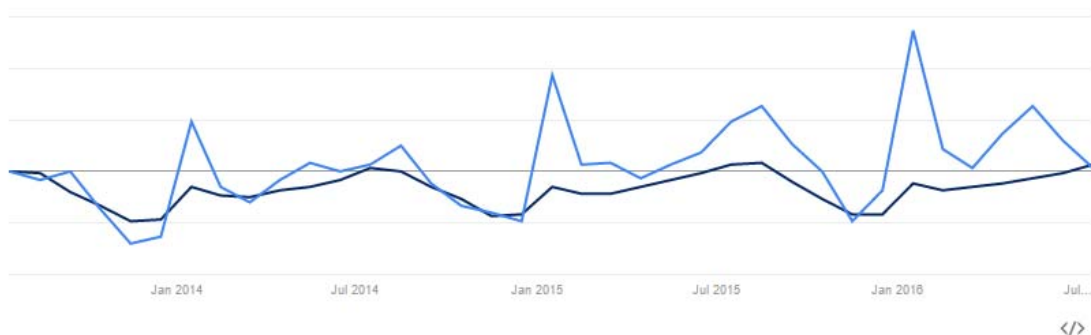
Burson-Marsteller (B-M) was responsible for all elements of PR/Communications for the Jamaica Tourist Board across the UK and Ireland. B-M PR activity supports all functions of the JTB marketing mix, including:

- Marketing/promotional activity
- Press trips (focus on consumer lifestyle)
- Social media and online activity – management of Facebook, Twitter and Instagram
- Influencer relations
- Media relations
- Video News Releases (VNR)
- Event support and organisation
- Proactive/reactive press office
- Profile building and brand awareness
- Hotels & airlines liaison and partnership
- Event management and promotions
- Crisis management

### Highlights from July 2015 – March 2016

**115** pieces of media coverage generated

Google Trends Analytics:



Seasonality is a clear factor in how people in the UK search for Jamaican holidays on Google, with an expected spike in January each year. Aware of this trend, B-M pushed for a wave of press trip coverage to appear in media over the key months (December and January). As a result, in January 2016 we observed a much higher peak compared with previous years, especially compared with the travel industry average (dark blue), which is indicative of the successful campaigns executed.

### **Social Media**

B-M took over the digital strategy and community management for Jamaica Tourist Board's UK social media accounts (Facebook and Twitter), and the global Instagram account, in July 2015.

### **Jamaica's Social Media Channels**

#### **July 2015**

Instagram: 3k

Facebook: 9k

Twitter: 1.1k

#### **31 March, 2016**

Instagram: 10k

Facebook: 27k

Twitter: 1.8k

### **Growth**

233.33% increase

200% increase

63.64 increase

- **Content Calendar:** One early and important change was changing the quarterly content calendar to monthly, allowing for more flexibility to cover key topics/themes and events
- **Twitter:** Ran a paid campaign around World Travel Market 2015 to grow the UK Twitter feed (<http://twitter.com/visitjamaicauk>). We activated a Twitter campaign around Britain's Next Top Model, a UK reality TV show, which was filmed at Sandals. This was a huge boost to the channel, with engagements from a number of judges and contestants driving new audiences to the Twitter page
- **Instagram:** Moved away from regionally focused Instagram accounts into one global account devising the digital strategy and community management while working closely with the US team to increase quality and grow reach. This has been tremendously successful, with the account growing from 3k to nearly 10k followers as of March 31 (<http://instagram.com/visitjamaica>)
- **Facebook:** Recommended switching to Facebook global pages, ensuring audiences see region-specific content as opposed to content not relevant to them. We've grown the UK audience to 27k. Our content on Facebook has been seen over 280k times through FY15/16 (<http://facebook.com/visitjamaica>)
- **Social media toolkit:** We developed a hotel partners social media toolkit, designed to educate on the principles of social media and provide tips for improving their brands' online presence, and increasing the reach of destination Jamaica

## Key PR Activations

### Press/Influencer Trips

B-M adopted a multi-channel approach when inviting media to the island to maximise each trip. This included:

- *Press Trip feature* – online and in print where applicable
- *Social Media amplification* - images on their own personal social channels and their publication's social channels

B-M also introduced an influencer relations programme to build relationships with digital media e.g. bloggers and vloggers. By doing this, B-M were able to build a library of exciting content for Jamaica's social channels, outside of traditional stock photography.

B-M team also staffed an island immersion tour and two of the group press trips.

B-M worked with the following media/influencers to organise/support press trips\*:

Irish Media Trip (focusing on new flight route)

- Irish Tatler Man (Alexander Fitzgerald) – October 2015
- Irish Independent (Thomas Breathnach) – October 2015

- Irish News (David Roy) – October 2015
- Anouska Blog (Anouska Brandon) – October 2015

#### Birdwatching (niche area of focus)

- Mail Online (Richard Hartley-Parkinson) – November 2015
- Sunday Mirror (Karin Wright) – November 2015
- Sunday Express (Jan Brierley) – November 2015
- Metro (Pamela Owen) – October 2015

#### Individual Press Trips

- Ok! Magazine (Amy-Beth Elice) – August 2015
- The Independent/Mail On Sunday (Jessica Barrett) – November 2015
- Conde Nast Traveller (Ondine Cohane) – February 2016
- BA High Life (Kerry Smith) – February 2016
- Cruise Miss Blog (Danielle Fear) – February 2016
- Escapism (Lucy McGuire) – February 2016

#### Annie's Revenge (Golf) Press Trip

- Golf Punk (George Stead) – November 2015

#### Reggae Marathon Trip

- Men's Running (Graham Williams) – December 2015
- Women's Running (Lisa Jackson) – December 2015

Outcome: Coverage across consumer and travel media, increasing positive brand awareness and positioning Jamaica as a premium destination.

*\*This doesn't include the list of press trips B-M orchestrated during this time period that will take place later this year*

#### **Pitches/Press Releases**

In addition to press trip coverage, B-M created proactive storytelling angles to secure stories around key priority initiatives; examples of these pitches/press releases include:

- Record visitors to Jamaica from UK & Ireland
- Best Jamaican events in 2016
- Jamaica's best ecotourism attractions and experiences
- JamRock goes to Shamrock (pushing Irish and Jamaican similarities and connections)
- NyamJam and Restaurant Week
- Britain's Next Top Model destination announcement
- Kingston designated a creative music city by UNESCO

- Experiential gifting: trend of travelling over collecting material things
- Press release on Minister's appointment
- Jamaica International Invitational Meet
- Destiny Film UK Premier
- JTB appoints B-M as PR agency for UK & Ireland
- Jamaica's Top Tourism Officials Hail Lightning Bolt

### **Select Placements/Highlights**

Highlights of coverage secured include:

- The Independent – October 18, 2015 – Clarks shoes: New Reggae album pays tribute to classic English footwear
- Vogue – October 28, 2015 – How Jamaica Fell for The Desert Boot: The Story of Reggae's Love Affair with Clarks
- GQ – October 28, 2015 – Listen to the reggae album inspired by Clarks shoes
- Daily Mirror – November 14, 2015 – UK Visitors to Jamaica increased year on year...
- Mail Online – December 9, 2015 – Think Jamaica is just beaches, Bob Marley and Bond?
- Sunday Mirror – December 12, 2015 – From Birds to bobsleds, Jamaica has much more to offer than just beaches and rum
- The Scottish Sun – December 20, 2015 – The Gift of Travel
- Metro – January 3, 2016 – 9 reasons why you should go to Jamaica immediately
- The Irish Sun – January 16, 2016 - Cool Running to Island Sun with an Irish Connection
- TNT – January 21, 2016 – The best of Jamaica
- Irish Independent – January 23, 2016 – Travel: Cool Runnings Jamaica
- Irish News – January 30, 2016 – Jamaica me crazy
- TTG – February 12, 2016 – Jamaica welcomes record-breaking tourist numbers
- The Sunday Times – February 28, 2016 – Jamaican ad put me on the path to being a lounge wizard (David Hall interview)
- Men's Running – March 1, 2016 – One Love
- Women's Running – March 1, 2016 – Don't Worry Be Happy
- The Independent – March 4, 2016 – Jamaica's laid-back living: From bohemian Negril to rural Treasure Beach
- Wanderlust – March 23, 2016 – Jamaica for Teenagers

### **Clarks – Celebrating style and culture**

As part of our brief, B-M uncovered unique stories to promote Jamaica outside of traditional travel media. Clarks has been featured in songs and namechecked by many of the island's style icons. B-M partnered with British DJ, Al 'Fingers' Newman, an expert on Clarks shoes. With a book and album chronicling the love affair between Clarks and Jamaica available for release, B-M set about telling this extraordinary story.

*Outcome:* In total, B-M secured 11 pieces of coverage across national and lifestyle press including lengthy features in *Vogue*, *GQ* and *The Independent on Sunday*. A large number of cultural, musical and style publications also covered the story.

### **Irish Media**

B-M supported the JTB's attendance at the Irish Holiday Shows in Belfast and Dublin to increase awareness of the new flight route launch in the key January booking period.

- Developed a pitch to target media attending the shows and ensured they covered the new flight route
- Drafted press pack material including fast fact sheet
- Worked with the show's PR agency to ensure JTB was promoted on their social channels and that JTB was included in their media activity
- Secured radio interview for JTB to drive traffic to the JTB stand at the shows
- In addition to this, focused on profiling David Hall, Irish businessman and former CEO of Digicel, who opened the airport lounges in Jamaica. Secured interviews profiling his Jamaican success in nearly every Irish national publication, along with messaging around the new flight route

*Outcome:* B-M secured 16 key placements across the largest Irish nationals and travel verticals – achieving blanket coverage on social, print, online and radio. In total, B-M achieved 958,742 total reach in Ireland.

### **Sport**

- Jamaica House Beijing/ Bolt – social media buzz around Bolt's success at the games
- Drafted and executed social plan around Bolt World Games in August 2015
- Worked with our sister offices in EMEA and US to develop a global Olympics PR and Digital plan (activity not progressed)
- Developed social media ideas to support BREDS T20 Tournament and worked with Cricket UK Bloggers to support
- Executed Lashings social media contest via Twitter

- Provided counsel and social media recommendations surrounding House of Lords and Commons Cricket Team who travelled to Jamaica 24-28 September

### **Country Reputation Management Support**

B-M has a country reputation specialist team available for support when issues arise in our markets.

- Liaised with JTB
- Rewrote Jamaica's safety statement for reactive use
- Complete weekly social media audits in our market to find any potential crisis issues
- Complete daily monitoring reports combing through stories for any negative sentiment written in articles about Jamaica
- Drafted reactive statements for media around several issues, including Zika Virus
- Provided client counsel on anything from Zika to the influx of Sargassum on a number of Caribbean beaches

### **World Travel Market (WTM) 2015**

B-M supported JTB pre-WTM, during WTM and post event; activity included:

- Liaised with JTB regarding focus for WTM and drafted a PR and digital strategy
- Created content including press pack and video of iconic Jamaica visuals
- Working beyond travel trades: Press Association interview secured for Minister
- Full media schedule secured for Director with top travel media at the show
- Developed digital strategy and content including Spotify playlist of 60 iconic Jamaican songs
- Worked with partners to curate news update
- Media management and staffing support at WTM

*Outcome:* BM secured 7 pieces of coverage across national and travel media which achieved 1,198,247 total reach. B-M reached 45,000 impressions on social media

### **Other**

B-M continuously supports JTB's in-market activities and events. Below is a snapshot of such support:

- Staffed TravMedia Awards 2015 Event alongside JTB to liaise with Irish media
- Staffed Meet the Media trade event 15 September



- Worked with our design team and JTB to redesign the Island Vibes newsletter template. Drafted six-month newsletter plan to support JTB team
- Presented plans to hotel partners based in the UK to ensure open communication
- Rewrote Jamaica's core press materials to develop a clear style guide / tone of voice
- Draft a weekly status report on all PR and social elements (ongoing)
- Drafted letter for Director Pennicook to send to Marlon James congratulating him on his Man Booker win
- TUR Stockholm 26 – 27 September
  - Worked with our sister office in Sweden and developed a plan with activation ideas (budget did not permit execution of the bigger ideas)
  - Created a press kit and drafted press materials to support the event
  - Invited Swedish media to attend and visit Jamaica's stand
  - While Sweden is not in scope, B-M supported this event as an extra incentive should budget arise to work with our Sweden office in the future

## **SALES ACTIVITIES**

### **USA MARKET SUMMARY**

After a record breaking year, expectations were once again high for the US market to deliver extraordinary arrivals for 2015/2016. The ingredients were in place...

- over 50K additional airline seats for winter 2016
- New gateways with non-stop service
- Hobby Field in Houston
- Los Angeles
- Increased service from traditional winter cities
- Minneapolis
- Chicago
- Hotel rooms that were not in service last year were back with new branding

### **OUR OBJECTIVES WERE**

- Meet and exceed the target set for visitor arrivals
- Increase the membership of the Jamaica Travel Specialist, One Love Rewards Program
- Increase the number of travel agents recording their bookings on the JTS site

- Increase consumer awareness of the destination's product offering
- Target and encourage the Diaspora to vacation in Jamaica
- Attend Honeymoon/Bridal shows to target clients of this recession-proof market
- Use Social Media more effectively and cost effectively

## **STRATEGIES**

**Fall/Winter Sales Calls Blitzes.** Blanket the Northeast and Midwest (winter markets) with sales calls blitzes, with the assistance of supplier partners and tour operators. The US Team was on the road, connecting with and updating over 1,500 travel agents in all winter markets during the period September – December.

### **JTB Seminars and Workshops.**

A series of events across the entire US regions

**The Jamaica Travel Specialist** program has been a catalyst for measuring and steering travel agent bookings. It also gives the JTB leverage in the travel market by way of information distribution, motivation & reward and direct on-the-island learning about the tourism product. The site was re-launched on January 5, 2016 with a more interactive learning portal and a wealth of updated information.

### **The Jamaica Travel Specialist, One Love Rewards training programme**

[www.oneloverewards.com](http://www.oneloverewards.com) continues to be the nucleus of the working relationship between the US Sales Team and the travel agent community. The managing company of the program is now Travel Agent Academy which comes with technologically savvy approach to encourage and incentivize the agents to register to become a specialist, record their bookings and receive rewards for their loyalty. Currently, over 17,500 travel agents have successfully completed the course.

**The JTS Online store** has proven to be very popular with the agents, whether they are redeeming points for gifts for themselves or to share with their clients. Other incentives include: Monthly award to the top booking agent; on-island VIP service; preferred agent listing on [www.visitjamaica.com](http://www.visitjamaica.com), VIP fam tours; Quarterly e-newsletter and the coveted opportunity to be among the top 50 booking agents to attend the annual awards ceremony 'The White Affair'. The program is highly beneficial to our supplier partners as they have the opportunity of communicating through the JTB, with the entire database of agents.

**Fam Trips** were key as we continued the process of educating our agents on Jamaica. The designated Fam Tour Months are September and November and the JTB worked closely with our tour operator partners in organizing fam tours during this period.

**Zip code analysis** continued to play an important role as we looked at where the business was coming from and considered opportunities to grow market share, especially in regions that have the potential to garner additional visitor arrivals.

### **Education/Training**

In-house training of tour operator partners' reservations agents, JTB-hosted seminars/updates, familiarization trips, webinars and presenting sponsorship of trade associations events, etc. continued to sharpen selling skills.

### **Social Media**

This medium remained a high priority in engaging both consumers and trade partners. The emphasis this year was on content integration with lead generation tactics to deliver travel-intending consumers directly to Jamaica Travel Specialists.

### **Integrate Social into Traditional Activities**

We create activations that bring persons offline social experiences together with our social media to deliver instant value for both parties; the consumer responds to the value proposition (deals, information, giveaways) and the brand gets their data to trigger responses.

### **Webinar Series**

The Jamaica Travel Specialist program Webinar series brings together tour operators and tourism partners with travel agents to discuss new opportunities. The Webinars are always free and offers travel professionals a chance to hear best practices, offers, specials, new developments about winter season packages for travel to Jamaica.

### **TRAVEL AGENT OUTREACH**

We maintained a very strong relationship with the travel agent community that plays a pivotal role in in our sales endeavors. During the year under review, the JTB USA team participated in various major activities as outlined below:

**Updates/Training/Seminars/Blitzes/Joint Sales Calls/Product Launches** – Over 7,600 agents were visited during sales calls and/or hosted during training and product seminars during the execution of over 168 events.

**Familiarization Tours** were offered to specially selected Jamaica Travel Specialists and 13 were conducted which updated over 200 agents on the destination's product offering.

#### **TRADE/CONSUMER SHOWS**

Over 764,800 **Trade Personnel and Consumers** were reached during JTB's participation at some 201 shows. Through the aid of social media, the communication continued long after the end of the events.

#### **WEDDING/HONEYMOON SHOWS**

This 'recession-proof' niche continued to provide excellent returns on our invested time and resources. The JTB participated in over 16 events targeting this group and networked with over 15,100 potential brides, friends and families.

#### **WEBINARS**

One of the most cost effective and proven methods used to reach hundreds of agents. Over 1,000 agents were updated on the product during this fiscal year.

#### **DIASPORA EVENTS**

The Diaspora remains a very important segment in our effort to increase visitors to Jamaica. In our continued support, JTB participated in over 30 events reaching some 63,400 members of this group.

#### **SPORTING EVENTS**

In support of the local marathons in Jamaica, the JTB partnered with organizers to showcase the events to some 133,000 sports enthusiast at 2 overseas marathons.

#### **AIRLIFT UPDATE**

JTB's USA team continued to work closely with all airline and tour operator partners but more so with preferred partners who we believe will better facilitate the growth we desire. As a major sponsor of the American Airlines Vacations (AAV) product launch series across major US cities this year, Jamaica has achieved significant brand exposure and support from some of the more successful travel agent partners of AAV. Similarly we have increased our partnership and

visibility through sponsored events with Delta/MLT Vacations to further advance our goal of increased production.

Proposal for a major promotional campaign with JetBlue was under review and we expect to get approval in time for launching during 2016.

Plans with all other major partners continued to progress.

## **GROUPS AND CONVENTIONS**

The Groups & Conventions department, which is based in Miami, is headed by a Regional Director. The objectives of the department are as follows:

- to promote Jamaica globally as the preferred Caribbean destination
- to maintain brand exposure through the appropriate trade industry events in the marketplace
- to identify new opportunities that provide strong brand visibility to corporate end users and decision makers
- to increase sales activity in key sectors
- to develop on-island events/site inspection programmes that target industry sectors.

### **Target markets are :**

**Primary :** Incentive Travel and Corporate meetings

**Secondary:** Association meetings, SMERF (Social, Military, Educational, Religious, Fraternal) and African American.

High activity in the Department continued during the year under review, with emphasis placed on highlighting the Montego Bay Convention Center.

The Department continued its efforts to keep Jamaica as the preferred Caribbean destination for MICE (Meetings, Incentives, Conferences, and Exhibitions/Events) travel. This resulted in our participation at some 14 events where over 10,405 meeting planners were provided with information on our meetings facilities.

The department also facilitated several site visits of planners considering Jamaica for upcoming group programs.

## LATIN AMERICA

The Jamaica Tourist Board continued to be represented in the Latin American region by **Global Marketing & Sales, Inc.**, (GMS) led by its President, Mr. Alex Pace, under a five-year contract for the period April 1, 2013 to March 31, 2018.

GMS's direct responsibilities include the development of the marketing, sales and public relations initiatives for the region. Key markets had been identified as:

- Primary markets: Mexico, Brazil, Colombia, Ecuador, Chile, Argentina, and Peru
- Secondary markets: Panama and Costa Rica

The economic landscape in Latin America made the 15/16 fiscal year challenging, as Latin America remains trapped in recession. The expected contraction in Latin America's GDP this year reflects a projected contraction in Argentina, Brazil, Ecuador and Venezuela, which together account for 50% of the region's GDP.

Also impacting the regional outlook are weak exchange rates across Latin America. This weakness is having implications for tourism flows in all directions, but is particularly problematic for outbound tourism from the region. International trips have become too expensive for many consumers, driving many to travel domestically or regionally.

Nevertheless, 2015/16 saw continued expansion in Latin America with increased trade activity. Among the activities conducted by GMS during this period were **seminars, trade shows and familiarization trips**. Our initiatives continued to focus on the "Home of All Right" vacation experience of Jamaica in our sales calls and trainings.

Additionally, during the 15/16 term, JTB Latin America continued to focus on developing new airlift to the region. While COPA remains a leader and a critical component of our regional strategy, our goal was to create new flight options from key South and Central American hubs such that flight options are abundant, accessible, and diversely sourced. With that in mind, JTB LATAM will also continue to approach the region's top tour operators to develop new destination products with these new flight opportunities.

## ACTIVITIES OVERVIEW

- **Product Update seminars**  
12 seminars - Approximately 4,473 trade/media participants

- **Trade/Consumer Shows**  
8 shows - Approximately 30,960 participants
- **Fam Tours**  
11 trips - 115 participants

## **OBJECTIVES**

- Meet 2015/2016 visitation goal
- Develop dual-destination program with Miami via American Airlines
- Increase Tour Operator package sales
- Develop Spanish-language Jamaica website
- Position Jamaica as a value-driven, convenient, and unique destination option
- Develop new strategic airline partnerships for key markets
  - Aeromexico, interjet, Volaris
  - Avianca
  - LATAM Airlines (Formerly LAN Airlines)
- Develop an OTP for Tour Operators and Travel Agents
- Coordinate charters from Colombia in August and September
- Plan new charters from Peru

## **MARKET STRATEGY**

- Focus on our key markets
  - Mexico, Brazil, Colombia, Ecuador, Chile, Argentina, and Peru
- Strengthen consumer “Pull” of Push/Pull strategy
- Develop and promote new airlift opportunities
- Focus on the “Home of All Right” Jamaica experience based on price/value, convenience, and uniqueness of the destination
- Develop new “Home of All Right” experiential product opportunities
- Encourage the “Home of All Right” sales drive and theme
- Leverage COPA relationship
- Create in-market strategic partnerships for maximum leverage
- Develop new co-ops with in-destination partners
- Target mid- to high-end TOs and TAs for less cost-sensitive consumer base

## **TACTICAL STRATEGY**

- Increase destination trainings
- Increase TO package development

- Increase COPA package options and Advertising Campaign
- Conduct “Home of All Right” sales drive
- Increase co-op relationships with tour operators and travel agencies
- Increase product sales and training seminars
- Create sales incentive programs with top TOs and TAs

#### **CONSUMER “PULL” RECOMMENDATIONS**

- Increase social media Spanish-language content
- Strengthen consumer public relations and tailor per country vs just translating releases
- Develop a media e-newsletter

#### **NEW OPPORTUNITIES**

- Airline Partnerships:
  - The COPA Partnership presents an excellent opportunity for Jamaica and we will continue to work to develop this opportunity with the airline and COPA Vacations agents.
  - The JTB Latin America team is also already in conversation with American Airlines to develop a dual-destination program with Miami. We believe this will open new opportunities for consumers to visit Jamaica, and then go to Miami to shop and visit family.
  - We will also reach out to Aeromexico, Avianca, LATAM Airlines, interjet, and Volaris to develop further partnership opportunities.
- Increase strategic alliances with in-destination partners
  - In-destination partners are absolutely essential in increasing visitation. They make the Jamaica destination offering complete. The JTB Latin America team will expand its outreach to in-destination partners, especially hotels, to provide a broad selection of immediate options to Tour Operators.



## **CANADA**

### **Highlights**

In 2015, for the tenth consecutive year, the Jamaica Tourist Board's Canadian operation was honoured with the coveted Agents' Choice Award for the Favourite Tourist Board in Canada.

Coming out of a record breaking year in 2014, 2015 proved to be challenging. This was so because of declining oil prices, devaluing Canadian dollar and an overall lack of economic confidence on the part of the Canadian consumer.

### **Travel Agents**

- We continued our incentive program for agents where they won monthly prizes for bookings to Jamaica. This was part of the ongoing Jamaica Travel Specialist Programme.
- Canada produced 14 of the top 50 selling Jamaica Travel Specialists for 2015.
- We participated in over 70 trade shows and engaged over 20,000 retail travel professionals directly.
- Fam trips are still very effective. Agents sell what they have experienced. We hosted 101 travel agents on 7 fam tours.
- We engaged over 20,000 travel agents through the very popular Island Vibrations quarterly newsletter.
- We continue to utilize social media to increase our interaction with trade and consumers.

### **Consumer Direct**

- We participated in over 43 consumer shows and engaged approximately 2.5 million consumers.
- This included interacting with 60,000 future brides at wedding shows across Canada. This has helped to increase our summer business.
- Conducted a series of social media promotions that engaged over 4 million consumers.

### **Diaspora**

We participated in 7 diaspora initiatives across Canada with a direct reach of 37,000 diaspora members.

### **Airlines/Tour Operators**

We continued to work closely with our airline and tour operator partners, the four major ones being Air Canada Vacations, Sunwing, Transat and Westjet Vacations. All co-op marketing plans were designed and approved on a cooperative basis. Airline and tour operator reservations centres' training were also included in our B2B (business to business) activities.

### **Jamaica House at PanAm Games 2015**

The exposure from Jamaica House was more than expected. We enjoyed coverage across Ontario through CBC Television, City TV, G98.7 radio, travel trade media and all social media platforms. We estimated that we engaged approximately 3 million consumers indirectly and 3,000 directly. The event was planned and executed by the JACANA Group with lead sponsorship from Jamaica Tourist Board. Other sponsors included Sunwing, Royalton White Sands, Jamaica National Building Society, Grace Kennedy, and others. Attendees included members of the travel community, numerous celebrities and members of the media.

## **UNITED KINGDOM**

During the period under review the Jamaica Tourist Board London office was actively involved in numerous consumer shows, trade shows and other events including the activities and promotions as summarised below.

Fam trips	6 Fam Trips	43 Travel agents were hosted across 6 fam trip visits. 5 of the participants were top sellers attending "The White Affair". 9 were wedding and honeymoon specialists. 20 were Jamaica Travel Specialists on destination updates. 18 were Irish travel agents and tour operator staff who are part of Falcon (TUI) to launch the direct Dublin Montego Bay service.
Trade Seminars	49 events	Over 3,000 travel agents and wholesale staff across the UK, Ireland & Scandinavia were updated on destination Jamaica in the reporting period. With established direct flights from Stockholm, Copenhagen, Helsinki and new departures from Gothenburg and Oslo planned for winter 2015-16.  The team participated in significantly more activity across the Nordic region, additionally in the partnership with TUI Thomson

		and their series of Thomson Ticket Roadshows combined with our own “Home of All Right” roadshows. The seminars and blitzes were arranged to support new regional departures and saw the number of agent seminars double, reaching over 50% more agents and sellers.
Trade Shows	10 events	<p>360,000 visitors.</p> <p>The Meeting Show, London – July 2015</p> <p>The Northern Travel Ball, Manchester – September 2015</p> <p>TUR, Stockholm , Sweden – Sep 2015</p> <p>The Wedding Show, Manchester – Oct 2015</p> <p>The Wedding Show, Birmingham – Oct 2015</p> <p>World Travel Market, London - Nov 2015</p> <p>International Luxury Travel Market, Cannes France – Dec 2015</p> <p>The Holiday Show, Dublin, Ireland – Jan 2016</p> <p>The Holiday World, Belfast – Jan 2016</p> <p>MATKA, Finland – Jan 2016</p> <p>FERIE, Denmark – Feb 2016</p>
Tour Operator Launches	2 events	<p>Thomson is the UK’s largest tour operator and retail travel agency chain. In 2015-16, we continued to work closely nationally with their retail stores as a preferred destination partner. Through an association with their Thomson Tickets division, Jamaica has been showcased at over 25 events nationally as Thomson prepares to launch their brochures and premium booking windows.</p> <p>In June 2015, the JTB worked closely with Barrhead Travel, Scotland’s largest travel company on a month long campaign which featured Jamaica on radio and across all their 17 shops. This was a follow on to the 2014 consumer activation for Jamaica around the Glasgow 2014 Commonwealth Games.</p>
Product Launches	2 launches	<p>During 2015 Jamaica Sport sponsored <b>The BREDS Cup</b>, a T20 cricket tournament hosted at Jakes in Treasure Beach. The event was centred on an all stars team “Lashings” playing in the tournament and visiting teams playing in a round robin against them. As part of the agreed sponsorship by Jamaica Sport, the JTB was invited to attend and host clients at some of the 30 Lashings summer events around the UK. The events formed a platform for</p>

		consumer engagement and promotion across the summer and over 3,000 VIPs and 10,000 spectators had positive impressions from Jamaica.
Sales Calls	290	Regular blitzes across all the key UK cities, both in the North and the South, have been done over the reporting period. We recently introduced a new Business Development Officer into the market and as part of her training and induction, blitzes, sales calls and client events had been arranged. Particular attention was paid to the Midlands and Northern region primarily due to her jurisdiction but also the increased capacity from regional airports by TUI and the need to be visible once again.

## **EUROPE (East, West, Central & Southern Europe)**

The German market remained relatively flat given the factor of excessively strong demand for Cuba as well as no growth in air capacity from Germany. Italy and Spain grew by 30% and 22% respectively in the fiscal year. The Netherlands recorded an increase of 17% primarily during the Winter, while Belgium had an increase of 11% primarily during the Summer. France with strong potential continues to under-perform due to lack of direct air service. Russia continues to be compounded by its dramatic decline in economic performance due mainly to sanctions imposed and the massive drop in prices for its main export, oil.

Direct flights are not readily available from Continental Europe, except for Condor, Jetair and Arkefly, which account for 32%, 18% & 9% of total arrivals from the region, while same day west bound connections are difficult. American and Delta through their respective affiliations have reach into every major Continental European city and have increased market share with competitive pricing, accounting for just over 20% of the loads from Continental Europe into Jamaica. Neos from Milan to Jamaica has been well received and resulted in an increase of over 3,000 additional seats from Italy primarily in Winter of the fiscal year, and phenomenal growth in the months of Jan-Mar 2016.

We continue to focus on twin destination offerings combining North America, Panama, Curacao and St. Martin. We welcome any moves to improve non-stop service between Cuba and the DR in this regard.

Advertising was effected mainly through coop support with tour operator partners. The regional office participated in more than 25 major trade and consumer shows across Europe including Top Resa and ILTM in France; TTG, BMT and No Frills in Italy; BMW Golf Open, CMT, FREE and ITB in Germany; FITUR in Spain; Vakantiebeurs and KLM Golf Open in Holland; Vakantiesalon in Belgium, as well as Travel Meeting Point in the Czech Republic. The JTB also participated in two new trade shows in Poland, that is, the Luxury Travel Show in Warsaw and The Lodz International Trade Fair in Lodz.

Some of our coop activities include Travel Agents Workshops and Roadshows with tour operator partners. Over 9 such activities were done with some of our main partners including FTI, Thomas Cook and Der Touristik in Germany, Eden Viaggi in Italy, as well as SelectAir and TUI in Belgium. The JTB also participated for the first time in the TTR Baltic Roadshow involving all 3 Baltic States. Additionally, a mini European roadshow put on by the JTB was held in January 2015 covering the cities of Dusseldorf, Frankfurt, Munich and Milan. In all, a total of 20 cities across Europe reaching over 5000 agents.

It should be noted that Jamaica was selected as the destination to host the DSDS TV programme (Germany's 'American Idol'), filming for which took place from 11-25 November 2015. The programme, which was aired from 5 March – 9 April 2016 (5 episodes), showcased a wide array of Jamaican scenery, attractions and culture. In addition, a string of promotional campaigns were orchestrated to run concurrently with the airing of the show which included Facebook online promotions, as well as online campaigns with TUI and ASNM Media to the tune of EUR 67,914. Showtime has a real value of approximately US\$56 million.

Fam and press visits from both key and emerging markets were carried out. Some key press visits included the 7Gold TV crew and Kilimagiaro from Italy, German national television channel, RTL2, as well as TV2 from France, all of whom did travel programs for their respective markets. Editorials and published articles resulted from the detailed press visits which were targeted.

Digital engagement primarily focused on growing facebook pages for key markets. We utilized this medium to increase collaboration with Online Travel Agencies participating with Rumba, Spain in Summer of 2015.

## **MARKETING REPRESENTATION**

In addition to the JTB's offices in Jamaica (Kingston and Montego Bay), USA (Miami), Canada (Toronto), United Kingdom (London - covering the United Kingdom, Ireland and Northern Europe), and Germany (Berlin - covering rest of Europe), marketing representation services were maintained in the following markets:

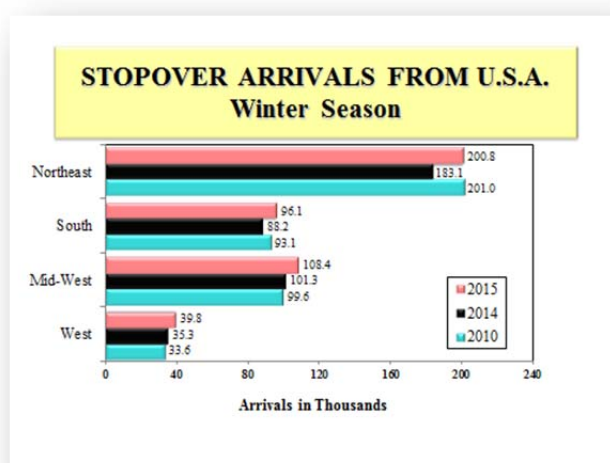
- |   |                  |   |  |
|---|------------------|---|--|
| ▪ | Latin America    | - | Global Marketing & Sales (Alex Pace)     |
| ▪ | Germany          | - | fastforward-marketing (Gabi Romberg)     |
| ▪ | Spain & Portugal | - | Sergat Espana (Marc Meister)             |
| ▪ | Italy            | - | Brian Hammond Associates                 |
| ▪ | Holland )        |   |  |
|   | Netherlands )    | - | Hans van Wamel/Color Travel Services     |
|   | Belgium )        |   |  |
| ▪ | Japan            | - | Fourth Valley Concierge Corporation      |
| ▪ | India            | - | TRAC Representation (India) Private Ltd. |
| ▪ | China            | - | China Business Network                   |

## **PERFORMANCE IN THE MARKETPLACE**

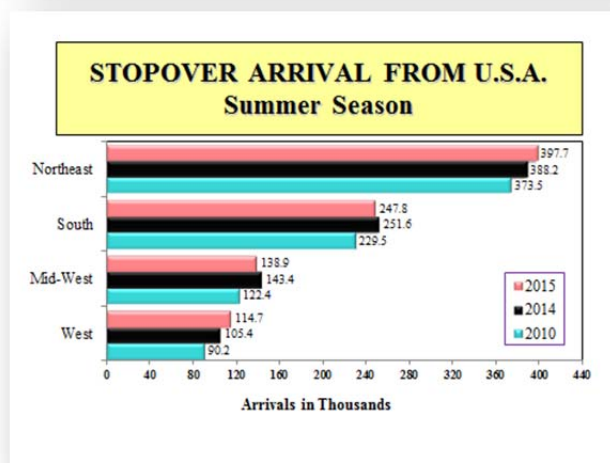
### **UNITED STATES**

The U.S. economy grew by 2.4% in 2015 (that is, from the 2014 annual level to the 2015 annual level), this was the same level of increase in 2014.<sup>1</sup> Travel by 32.8 million US citizens during 2015 to overseas regions indicates that outbound travel from the USA increased by 6.5% over outbound travel during the corresponding period in 2014. Travel to the Caribbean region increased by 6.6% during this period also, reflecting a market share of 23.3% of the USA outbound travel market. Of the 73.5 million total outbound travelers for 2015, 40.7 million traveled to Canada and Mexico.<sup>2</sup>

With regard to Jamaica, during the winter season (Jan. – Apr.), stopover arrivals in 2015 were 9.1% higher than those in 2014 and 4.2% higher than in 2010. In comparison to 2014, stopover arrivals in the 2015 winter season from the Northeastern and Southern regions increased by 9.6 and 11.1% respectively. The Western and Midwestern regions of the U.S grew during this period by 7.0 and 7.6% respectively.



For the summer period (May – Dec.), the US market grew by 1.2% compared to 2014 and rose 10.2% over 2010 stopover arrivals. Summer arrivals in 2015 were 899,044. In 2014, 888,503 stopover arrivals came during summer and in 2010, 815,623 stopover arrivals visited. Stopover arrivals from the US regions were mixed in 2015. The strongest growth was recorded in the Western region, with 114,691 arrivals up 8.8%, followed by



<sup>1</sup> Bureau of Economic Analysis, U.S Department of Commerce - News Release – April, 2016

<sup>2</sup> U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries “U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico March 2016”

the Northeastern region where the most US arrivals originate from, with 397,694 arrivals, up 2.4%. The Southern region, recorded 247,805 arrivals and the Midwestern region recorded 138,854 arrivals; both declined by 1.5% and 3.1% respectively.

The Northeastern and Southern regions contributed 70.1% of the US stopover visitors to Jamaica during 2015. This represents 2.0 percentage points less than its contribution in 2010. The Midwest region contributed 18.4% of the stopover arrivals and the remaining 11.5% of the stopover visitors came from the Western region. The Northeast market region with 598,474 arrivals increased by 4.8%, the South with 343,952 arrivals increased by 3.5%, the Midwest with 247,278 grew by 1.1% and the Western region with 154,445 increased by 4.3%. Overall, arrivals from the USA market increased 3.7% in 2015 with 1,344,149 over the 1,296,457 stopovers in 2014. This performance was 5.7% more arrivals than the 1,271,262 arrivals recorded in 2013 and 6.9% more than the 1,257,669 in 2012.

### **USA Visitor Summary**

- The average length of stay for Foreign Nationals US visitors in 2015 was 7.6 nights, which is lower than the average of 8.8 nights for all visitors.
- In 2015 a total of 1,031,462 or 76.7% of US visitors came to Jamaica for leisure, recreation and holiday, 186,624 or 13.9% came to visit friends & relatives, 49,390 or 3.7% on business and 76,673 or 5.7% for other or unstated purposes.
- The annual average growth rate for visitors from the USA over the past five years from 2011 to 2015 was 2.3%.
- In 2015 the age distribution of US stopover visitors indicated that 10.8% were aged less than 18 years, 6.8% were between 18 and 24 years, 49.4% were between 25 and 49 years, 24.6% were between 50 and 64 years and 8.4% were over 64 years.
- The Gender mix of visitors from USA, were 599,805 males (44.6%) and 744,344 females (55.4%). The gender ratio of visitors from the USA is 124 females per 100 males.
- The peak periods of US stopover visitors to Jamaica in 2015 were: Summer (June – July), Easter (March) and Christmas (December). The months with the highest numbers of stopover arrivals in 2015, in descending order, were: July, June, December and March. This pattern has been holding strong for the past three years (2013 – 2015).
- The most popular resort region to which US stopover visitors stayed in 2015 was Montego Bay with 482,293 or 35.8% of US visitors. 20.4% or 274,011 of the US visitors stayed in Ocho Rios and 19.4% or 261,197 stayed in Negril.



## **CANADA**

Canada's economic activity slowed down in 2015 with GDP at constant prices growing by 1.2% after increasing by 2.5% in 2014<sup>3</sup>. Outbound trips reached an estimated 32.270 million in 2015<sup>4</sup>. Arrivals from Canada in 2015 totaled 391,409 representing 28,489 less Canadian visitors to Jamaica than in 2014, a 6.8% decrease.

The Canadian market fell during the (January – April) winter period, decreasing by 5.3%. During this period, a total of 184,237 stopovers came from that market compared to 194,625 in winter 2014. This is below the record number of 211,925 that came in winter of 2012, and is 27,688 less visitors. All the months of winter recorded decreases: January (-4.0%), February (-5.0%), March (-7.3%) and April (-4.8%).

This trend continued into the summer period; an 8.0% decrease was recorded for the May – December summer period, with a total of 20,172 stopovers arrivals compared to the 225,273 arrivals in summer 2014. The following months recorded double digit percentage decline in arrivals: June (10.5%), and December (11.0%).

The main province of Ontario contributed 261,859 or 66.9% to the Canadian stopover arrival total, which was a decrease of 3.6% over the 271,654 who came from that province in 2014. Quebec, the second leading visitor producing province, (with 12.5% of the visitors), produced 13.6% less stopovers. The other two leading provinces, Alberta and British Columbia also recorded declines. Alberta declined by 15.8%, while British Columbia declined by 8.4% in 2015 compared to 2014.

### **Canada Visitor Summary**

- The average length of stay for Foreign National Canadian visitors in 2015 was 9.0 nights.
- In 2015 a total of 327,794 or 83.7% of Canadian visitors came to Jamaica for leisure, recreation and holiday, 40,532 or 10.4% came to visit friends & relatives, 9,562 or 2.4% came on business, and 13,521 or 3.5% came for other or unstated purposes.

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<sup>3</sup> Statistics Canada, Industry Accounts Division (March 2015). Canadian Economic Accounts Quarterly Review.

<sup>4</sup> Canadian Tourism Commission (December 2015). Tourism Snapshot: A focus on the markets that the CTC and its partners are active Vol, 11, Issue 12

- The annual average growth rate for visitors from the Canada region over the past five years from 2011 to 2015 was 0.8%.
- In 2015 the age distribution shows 12.6% were aged under 18 years, 5.9% were between 18 – 24 years, 46.0% were between 25 – 49 years, 27.0% were between 50 – 64 years and 8.5% were 65 and over.
- The Gender mix of visitors from Canada, were 179,744 males (45.9%) and 211,665 females (54.1%). The gender ratio of visitors from Canada is 118 females per 100 males.
- January through March and December are the peak months for visitor arrivals from Canada in 2015. This coincides with the cold winter climate experienced in Canada during this period
- The most popular resort regions to which Canadian visitors stayed in 2015 was Montego Bay with a total of 132,748 or 33.9% of Canadian visitors. 30.2% or 118,031 Canadian visitors stayed in Ocho Rios and another 19.8% or 77,585 stayed in Negril.

### **United Kingdom/Europe**

The number of visits abroad by UK residents grew by 8.8% in 2015 from 60.1 million in 2014 to 65.4 million. This growth occurred in relation to visits to North America which grew by 5.4%, Europe grew by 9.3%, while visits to and Other Countries grew by 6.4%.<sup>5</sup>

Stopover arrivals to Jamaica out of the European region recorded positive growth in 2015. Arrivals from Europe increased by 6.0% in 2015, moving from 261,081 arrivals in 2014 to 279,332 arrivals in 2015. The United Kingdom, Germany, Italy and Sweden are the most important visitor producing countries within this regional market, in descending order of importance.

### **United Kingdom Visitor Summary**

- The United Kingdom, with 199,002 stopover arrivals, registered an increase of 12.3% over the 177,216 recorded in 2014. This is higher than the previous record level of visitors from the UK in 2008 when 188,436 were registered. The performance for winter was up by 27.5%; this trend continued in the summer with a lower level of increases to end the season with a 6.6%.

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<sup>5</sup> UK National Statistics – Travel Trends -2015, February 2016

- The average length of stay for Foreign National UK visitors in 2015 was 15.3 nights, which is higher than the average of 8.8 nights for all visitors.
- In 2015 a total of 129,946 or 65.3% of UK visitors visited Jamaica for leisure, recreation and holiday, 45,746 or 23.0% visited friends & relatives, 12,495 or 6.3% came on business, and 10,815 or 5.4% visited for other or unstated purposes.
- The annual average growth rate for visitors from the United Kingdom over the past five years from 2011 to 2015 was positive 3.5%.
- In 2015 the age distribution shows 12.4% were aged under 18 years, 6.9% were between 18 – 24 years, 43.5% were between 25 – 49 years, 28.1% were between 50 – 64 years and 9.1% were 65 and over.
- The Gender mix of visitors from UK, were 91,119 males (45.8%) and 107,883 females (54.2%). The gender ratio of visitors from the United Kingdom is 118 females per 100 males.
- July, August and December were the peak months for visitor arrivals from UK in 2015 with July being the highest month with 21,455 visitors.

### **Continental Europe**

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 20,528 stopover arrivals in 2015, the German market decreased by 3.8% over the 21,346 recorded in 2014. This is 52.3% below the peak of 43,018 German visitors recorded in 1998.

During 2015, Italy was the second main visitor producing country from Continental Europe with 9,482 arrivals; however this was below the 29,187 Italian arrivals recorded in 1992.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway and Sweden) represents 77.3 per cent of the total European market and contributed an additional 25,762 arrivals to the European total in 2015.

The performances of the following European countries albeit small numbers recorded mixed growth in 2015 compared to the corresponding period in 2015;

- Finland 14.7%
- Norway 28.22%
- The Netherlands 9.1%
- Denmark 104.7%
- Spain 18.1%
- Switzerland 4.4%
- Belgium 7.9%
- Poland 0.6%
- Czech republic 3.6%

### **Latin America**

Latin America continues to be a market which holds much potential for Jamaica. The strengthening of flight connections within this market through direct airlift via Copa Airlines facilitated service out of many countries through the airline's hub in Panama. Stopover arrivals out of the Latin American market region were flat, moving from 29,263 in 2014 to 29,387 in 2015.

Of the top three visitor-producing countries in the South American sub-region, Chile with 5,348 visitors increased by 18.1%; Argentina with 3,431 visitors decreased by 15.0% and Brazil with 3,249 increased by 11.1%.

From the Central American sub-region, Mexico with 4,351 visitors increased by 39.6%; Panama with 2,141 decreased by 14.2%; and Costa Rica with 1,299 increased by 9.7%

### **Caribbean**

Arrivals from Caribbean territories to Jamaica increased in 2015, Jamaica welcomed 62,612 arrivals from this market, which is 3,604 less arrivals than the 66,216 Caribbean nationals who visited Jamaica in 2011, but it is a 6.0% increase over the 59,057 who visited in 2014.

The Cayman Islands, with 16,825 stopovers, Trinidad and Tobago with 11,282, The Bahamas with 5,581 and Barbados with 4,350, continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 36,053 stopovers or 60.8% of the total Caribbean arrivals.

## **Other Countries**

China, Australia, Japan and India are the main visitor producing countries from other parts of the World. When compared to 2014, China with 3,744 grew by 41.6%, Australia, with 2,999 stopovers grew by 19.3%, Japan with 2,163 was up by 7.0% and India with 1,833 fell by 7.6%.

## **CRUISE PASSENGERS**

According to the Florida-Caribbean Cruise Association (FCCA), 23 million passengers sailed the oceans on FCCA and/or CLIA Member Lines in 2015, up 4.1% from the 22.1 million passengers in 2014. In 2015 the growth of the cruise industry continued with twenty-two new ships that sailed the world's waters for the first time, totalling 20,000 new beds and an investment of more than US\$4 billion.

The current cruise ship order book extending through 2020 includes 33 new builds, with over 100,000 berths at a value of over US\$25 billion.<sup>6</sup>

Today's cruise ships offer a world of innovations that align with cruise lines' brands from sky-diving simulators and robotic bartenders to celebrity chef kitchens and all-suite staterooms and facilities that accommodate family members of all generations traveling together or passengers cruising solo. Cruise ships' facilities and services continue to exceed the expectations of a growing population of travelers, and cruisers can easily find a cruise brand, ship, stateroom and itinerary to suit them.

The Caribbean continues to lead as the number one cruise destination, accounting for more than a third (35.5%) of the entire global deployment capacity market share. The passenger numbers for the Caribbean continues to be consistent and high, despite other rising cruise destinations.

Jamaica recorded a double digit growth in cruise passengers during 2015. This total of 1,568,702 cruise passengers who visited our shores was a 10.2% increase over the 1,423,797 recorded for the corresponding period in 2014. It was also 17.3%, or 231,708 passengers ahead

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<sup>6</sup> Source: Florida-Caribbean Cruise Association – Cruise Industry Overview 2015

of the record year 2006, when 1,336,994 cruise passengers visited our shores. Seasonally, cruise arrivals recorded an increase of 11.2% in the winter period (January to April) with 654,564 cruise passengers, up from the 588,691 for 2014. During the summer period (May to December), with the exception of the months of July and October, which recorded declines of 3.8% and 17.9% respectively, every other month recorded increases in cruise passenger arrivals, ranging from as low as 3.1% in August to 28.9% in September. For this summer period 914,138 cruise passengers visited Jamaica and grew by 9.5% from 247 ship calls, compared to 835,106 passengers and 224 ship calls in 2014.

The port of Falmouth contributed 752,205 cruise ship passengers or 47.9% of total passengers to Jamaica from 190 cruise ship calls.

The port of Ocho Rios, which in the past provided the largest share of Jamaica's cruise arrivals, accounted for 444,780 or 28.4% of the 1,568,702 who arrived at our shores in 2015. The port of Montego Bay accounted for 371,487 passengers or 23.7%.

The cruise ships carrying the most passengers to Jamaica in 2015 were all from the Royal Caribbean Cruise family of ships, the *Oasis of the Seas*, *Independence of the Seas*, and *Freedom of the Seas*, all calling to the Port of Falmouth. The *Oasis of the Seas* made 26 calls with 159,727 passengers. The *Independence of the Seas* also made 26 cruise ship calls with 105,935 cruise passengers and the *Freedom of the Seas* made 25 cruise ship calls and provided 105,521 passengers. The combined total of 371,183 cruise passengers from these three ships represents 23.7% of Jamaica's total cruise passenger market.

## **JAMAICA**

The Jamaica Tourist Board's local offices are responsible for on-island marketing and communication programmes and support the initiatives of the overseas offices and public relations and advertising agencies in promoting Jamaica's tourism interests.

### **The Marketing Department**

The JTB's Marketing Department is responsible for worldwide marketing and communication programmes. The marketing of Jamaica's tourism product is achieved through advertising, public relations and in today's world making the best use of social media. The Department includes several units including Marketing Communications, Website/E-Commerce, Tourism Awareness, Research & Market Intelligence and the Information and Resources Centre.

The **Marketing Communications Unit** of this department provided support in the areas of media relations, message management, and crisis communication. Supported activities included radio remotes, trade shows, international events, conferences and festivals. Providing day to day supervision to the international public relations agencies, the unit identified opportunities for the JAMAICA brand to be represented in major markets, generated exposure for Jamaica through promotional activities, facilitated press trips and media attending special events.

#### **Press Releases:**

A total of one hundred and sixty (160) press releases were distributed through our representative agencies in Germany, India, China, Japan, North America, Latin America, and UK/Europe. The releases were shared with media houses and freelance journalists in order to generate coverage.

- 2015 April – June: 18 *press releases*
- 2015 July – September: 36 *press releases*
- 2015 October – December: 86 *press releases*
- 2016 January – March: 20 *press releases*

#### **Press trips:**

The Jamaica Tourist Board (JTB) hosted several journalists on island to experience the culture, cuisine, attractions, hotels and other aspects of Jamaica's tourism offerings. Press trips were also coordinated to cover JTB sponsored events (*See listing below*). A total of fifty three (53) press trips were managed through the Marketing Communications Unit.

- 2015 April – June: 7 *press trips*
- 2015 July – September: 14 *press trips*
- 2015 October – December: 23 *press trips*
- 2016 January – March: 9 *press trips*

#### **Press Trips in support of events:**

In an effort to provide coverage for major events in Jamaica, the JTB hosted media trips around major events and invited several international journalists to participate. Journalists from the various regions participated in a total of twelve (12) press trips.

- Reggae Sumfest Media Trip
- Culinary Press Trip
- Fat Tyre Media Press Trip
- Jamaica Product Exchange (JAPEx) Media Trip
- Jamaica Bridal Expo Media Trip
- Mobay City Run Media Trip
- Reggae Marathon Media Trip
- Rebel Salute Media Trip
- The Diaspora Conference
- Kingston City Run
- Jamaica Pro am - Annies Revenge
- Makka Pro

#### **Other projects:**

A total of fifteen (15) special projects were executed by the Marketing Communications Unit. The projects undertaken would include the hosting of VIP's and special events, as well as conferences. Destination Jamaica received great exposure from these activities.

- **Welcome Reception for the Chartered Institute of Arbitrators Caribbean Branch** - The Jamaica Tourist Board (JTB) hosted a welcome reception for 200 international delegates who visited the island to attend an international conference which was organized by the Chartered Institute of Arbitrators Caribbean Branch. The event occurred on Wednesday, 2015 July 8 at the Devonshire, Devon House.
- **Tourism Presentation ( 2015 July 17)** – The Marketing Communications Unit made a presentation about Jamaica at the University of the West Indies to the Venezuelan Engineers who participated in the English Language Programme at Latin American Caribbean Centre.



- **Experience Jamaica:** This year the campaign was broken in two. The second half started mid-August with a trade show on Aug 19. The 2015 campaign ended in November.
- **Burson-Marsteller Immersion Trip:** The team from the new UK Public Relations Agency visited Jamaica for a 1 week immersion from Aug 9- 14.
- **South West Airlines:** South West Airlines had their inaugural flight from Houston to Montego Bay and was hosted over the period Nov 1- 4.
- **Cliff Energy Adventure:** A collaboration with Cliff Energy Adventure, a competition was hosted with prize winners on island Nov 4- 11.
- **DSDS (German TV Show):** This is a major singing competition in Germany; the production team, contestants and judges were on island Nov 11- 26 for filming.
- **Mini Miracles:** JTB to facilitate confidential activity to capture video footage on island.
- **UK Popular Reality TV Show:** Jamaica Tourist Board facilitated a recce for the popular show on Aug 28. The Jamaican episodes were filmed on Oct 10- 22.
- **Die Geissens:** This is a popular German show that follows the Geissens on luxury vacations around the world. The family and TV crew were on island in Negril October 30 - November 2.
- **Tourism Awareness Week:** Tourism Awareness Week was celebrated from Sept 27- Oct 3. The theme for World Tourism Day 2015 was “One Billion Tourists: One Billion Opportunities”. The activities focused on a public education programme, using radio and print predominantly. A mini expo was held in the breezeway incorporating Experience Jamaica and the Tourism Linkages Hub.
- **JTB 60<sup>th</sup> Anniversary Celebrations:** The first in the lecture series was held at the Kingston and St. Andrew Library during Tourism Awareness Week. The exhibition continued to be seen at libraries across the island, moving to Manchester on Oct 7.
- **JAPEX:** The trade show took place at the Montego Bay Convention Centre (MBCC) from Sept 20- 23. As co- host with JHTA, we were involved with planning and implementing the event.
- **Bridal Expo:** JTB was a major sponsor of the Bridal Expo. The Marketing Department mounted a booth at the expo and facilitated a presentation to travel agents. Expo was Sept 19- 20 with a seminar on Sept 18.
- **G98.7 Radio Remote:** Moon Palace was the host hotel that facilitated the remote that broadcasted to Canada over 7 days.

#### **Presentations/Speeches/Remarks/Messages/Fact Checking:**

The marketing communications unit provided fact checking information for all major travel guides. Presentations, speeches, messages and editorial content were also crafted for executives of JTB to deliver at several events:

**Messages/ Speeches****TOTAL:*****Breakdown:*** April – June (5)

July – September (20)

October to December (9)

January – March (8)

**Editorial Content**

Bi-Weekly editorial content for Hospitality Jamaica publication.

**Fact Checking**

The unit assists with continuous fact checking in support of media trips and publications about destination Jamaica.

**Marketing Collaterals:**

The unit conducts research for editorial content and marketing collaterals as required.

**Website / E-Commerce Unit**

The Website/E-Commerce unit continued to use the unique experiences that are associated with Jamaica to encourage visitors to take a trip to Jamaica, or keep the destination top-of-mind for their future travel plans. The team utilized the resources assigned to the unit to acquire content and image assets representing the varied events and activities that were part of the wealth of experiences available on the island. The content and images were then used to engage our varied audiences and generate positive conversations about the destination and brand Jamaica.

At the end of the 2015-2016 year, the assets of the JTB, managed by the Website/E-Commerce Unit were:

***Website:***

- [www.visitjamaica.com](http://www.visitjamaica.com)

***Facebook:***

- [www.facebook.com/visitjamaica](https://www.facebook.com/visitjamaica); [www.facebook.com/jamaicajerktrail](https://www.facebook.com/jamaicajerktrail)

*YouTube:*

- [www.youtube.com/aboutjamaicajtb.com](http://www.youtube.com/aboutjamaicajtb.com),
- [www.youtube.com/myjamaicajtb.com](http://www.youtube.com/myjamaicajtb.com),
- [www.youtube.com/vibesjamaicajtb.com](http://www.youtube.com/vibesjamaicajtb.com).

*Twitter:* deals and tips about Jamaica and activities happening now

- [@VisitJamaicaNow](http://www.Twitter.com/VisitJamaicaNow)
- [@AskJamaica](http://www.Twitter.com/AskJamaica)
- [@WeddingsinJa](http://www.Twitter.com/WeddingsinJa)

*Pinterest:*

- [www.pinterest.com/myjamaica](http://www.pinterest.com/myjamaica)

*Instagram:*

- [www.instagram.com/visitjamaica](http://www.instagram.com/visitjamaica)

*Blog:* News form content on Jamaica with images and video as appropriate

- [www.islandbuzzjamaica.com](http://www.islandbuzzjamaica.com)

The work of the Website/E-commerce unit was integrated into the other initiatives of the JTB. The Website/E-commerce unit supports the wider marketing efforts of the JTB including:

- Media opportunities: trips for media, bloggers and photo shoots where participants were encouraged to share their experiences with the JTB via their preferred social media platform. Where appropriate, the unit shares/re-tweets/reposts their comments/images with the wider community audiences.
- Event Support: members of the team are dispatched to cover major events sponsored by the JTB
- Competitions, trivia and give-always are used to heighten awareness of events and significant activities in the markets.
- Support for Special Promotional activities in the marketplace

These activities are primarily used to heighten awareness of the wealth of experiences that is uniquely Jamaican and ultimately stimulate travel to the island.

## **Tourism Awareness Unit**

The Tourism Awareness Unit has as its objective the development of comprehensive appropriate programmes to promote the industry primarily among Jamaicans.

Over the 2015-2016 period the unit engaged in several activities geared towards informing the Jamaican public about the industry. Valuable opportunities to share the tourism message took the form of meetings, tourism talks, exhibitions and other fora organized by the unit or participated in. The primary destination promotion activities for the period were interactions with Tourism Actions Clubs members, tourism competitions and support of national programmes within the tourism industry.

Through the information desk the Unit continues to provide information to Jamaicans at home and abroad as well as tourists. In-house consultations, telephone exchanges and responses to queries received through the [www.visitjamaica.com](http://www.visitjamaica.com) information request contact were the general methods of exchange.

### **Tourism Action Clubs**

More than 105 tourism clubs were operational in primary, secondary and tertiary educational institutions across the island. Students continue to see the industry as one providing great employment prospects and through which they can achieve accelerated professional development. The Unit was increasingly involved in the delivery and extension of the curriculum and sharing career opportunities with club members and general student populations.

Upper level secondary and tertiary institutions' students benefitted from continued coaching and mentoring as they were being prepared to enter the workforce generally and tourism jobs specifically. The Unit was integral in the coordination of internship experiences for hospitality and tourism students, including eleven students placed across departments at the JTB. It participated in career/ job fairs and assisted persons with general tourism interest in their research on the industry.

### **Tourism Competitions**

The Tourism Awareness Unit guided the participation of students islandwide in various tourism and related competitions. These included the Jamaica Environmental Trust's Research competition, Florida Caribbean Cruise Association Environmental Poster and Essay competition, Global Travel and Tourism Research Award, Travel Writing, Travel Photo and student of the

year competition, CTO Youth Tourism Congress and JTB's 60<sup>th</sup> Anniversary Essay and Poster competition.

Jamaica did well overall in all the competitions, highlighted by its copping of 2<sup>nd</sup> place among the 19 countries which entered the Florida Caribbean Cruise Association Essay competition. The JTB's 60<sup>th</sup> Anniversary Poster (Primary Level) and Essay (Secondary Level) competitions were won by Tre-Sean Manaderson of Corinaldi Avenue Primary School and Thalia Morris of Ferncourt High School respectively.

### **Other Programmes**

The Tourism Awareness Unit also participated in celebrations to mark World Tourism Day and Tourism Awareness Week, facilitated the participation of over 700 students in the JTB's 60<sup>th</sup> Anniversary Lecture Series and the promotion of the Experience Jamaica programme. Over 250 Tourism Action Club students were facilitated in their participation in the Jamaica Environmental Trust's Clean Coast initiatives. The Unit also assisted JSIF along with TPDCo and MOTE with the implementation of the Community Tourism Bootcamp aimed at capacity building and business planning and supported the UWI TVET's development of Technical Vocation in Jamaica and the wider Caribbean.

### **The Clive E. Taffe Information and Resources Centre**

The IRC continues to maintain its reputation as a leading special library in the Caribbean and has as its mission the maintenance and management of access to accurate, relevant and current information sources, necessary to support the organisation in the achievement of its goals and objectives, and to facilitate researchers of the tourism trade and the wider society.

The Centre focusses on five primary areas of activities: acquisition of, or access to, current tourism material; recovery and conversion of materials to ensure that they are prepared in formats which facilitate efficient access; research and publishing of information to complete collections and publishing; managing collections of images to support the Board's activities; and assisting in the management of the business records of the organisation in accordance with the requirements of local and international legislation, standards and guidelines.

*Acquisition and Access* – Sources available in the physical collection grew by almost 300% to just under 7000 items, while access to electronic collections including Ebsco Host's Hospitality and Tourism Complete, UNWTO's E-library, ProQuest's Ebrary, Social and Economic Information Network and our Jamaica digital collections accounts for well over a 1,000,000 sources of

information. Open Access Databases were also used to compliment the information stock used. These include Google, World Bank, Edward Seaga Research Institute and the USA Central Intelligence Agency. In June of 2015, the physical collection of the Ministry of Tourism and Entertainment was merged with that of the IRC, making the IRC the library for both entities.

These sources were used to supply just over 1300 current awareness pieces and satisfy some 324 information research requests. 242 images were provided directly to tourism researchers, publishers and other interests. Just over 100 persons visited the physical facility which included staff of the Ministry of Tourism and other sister agencies.

*Recovery and Conversion-* Work continued in adjusting physical and electronic information sources and converting then to more accessible formats. Primarily, work continued on converting VHS tapes to digital media due to their vulnerability. Just under 100 pieces of documentation were also prepared for digital processing. Several of the converted media were used in creating electronic presentations for different departments.

*Research and Publishing-* The bulk of the information search activities surrounded the mounting of the JTB's 60<sup>th</sup> Anniversary Exhibition and Lecture Series. The display chronicles the marketing and promotion of the Board over the 60 years, divided by the different major campaigns. Indications of the different directors and highlights of the periods were included. The exhibit was mounted in physical formats across the island through the island's public library network and electronically on the Tourism Information Publishing Site (TIPS) at [www.jtbonline.org](http://www.jtbonline.org). The exhibit complimented the 60<sup>th</sup> anniversary Lecture Series which also was hosted across the resort areas. The lectures were conducted by noted historian Arnold Bertram and drew audiences of well over 1000 persons.

*Images Management-* Increasingly, images are provided to users via TIPS and, as such, over the period many persons were referred to that resource. The web site is being redeveloped to account for persons using these assets and also other resources provided by the site. Discussions continue with tourism partners to ensure that the collection is refreshed with new images of the island tourism product.

*Records Managements-* the IRC supported the Administration Department in the continued development of systems to manage the records and information programme of the JTB. Activities included the identification of a pilot department- Administration, the development of preliminary departmental coding and the development of a general sensitisation presentation for staff.

## **Research & Market Intelligence**

The RMI Unit is tasked with conducting research and providing statistical data to inform and facilitate the strategic management process of the Board. These activities include the development of methodologies and deployment of instruments to measure, according to international standards, relevant variables within the tourist industry. Annually, the unit publishes the Annual Travel Statistics, Visitor Satisfaction Survey and The Visitor Expenditure Survey, as well as other reports developed to gather market information.

The island recorded total arrivals of 3.7 million persons for the year 2015, from which it earned US\$2.4 billion. Just over 35,000 persons were employed directly by the industry to host our visitors, 63% of whom are from the United States. Please see **Appendix I** for a summarized report of the statistical data for the period under review.

## **CRUISE, EVENTS AND ATTRACTIONS DEPARTMENT**

### **ATTRACTIONS:**

The main objectives of the Attractions, Cruise & Events Unit remains that of developing a marketing strategy for attractions, inventory management by way of product quality assessment and/ or compliance monitoring in collaboration with TPDCo., and facilitation of new investment in the attractions sub-sector in collaboration with JAMPRO.

### **CRUISE SHIPPING:**

The JTB has been designated the responsibility for marketing Jamaica as a cruise destination. However, the modality of this and funding is still to be worked out with Port Authority of Jamaica. Interagency collaboration and communication on all cruise related matters is to be strengthened.

### **EVENTS:**

Events continue to be integrated in the marketing mix to provide additional “visitor pull” and leveraged to generate positive international media exposure. Among the many events which the JTB sponsored and/or endorsed during the year under review were the following, grouped according to the respective “passion points”:

### **CULTURE & ARTS:**

- Jamaica Ocho Rios International Jazz Festival, May 31 - June 7, Ocho Rios St. Ann and Kingston

- Talking Trees Literary Fiesta, May 23, Treasure Beach, St. Elizabeth
- DRP Writers Retreat, June 5 – 7, Lime Hall, St. Ann
- Sweatfest, June 26 – 28, Montego Bay, St. James
- Reggae Sumfest, July 12 - 18, Montego Bay, St. James
- Kingston on the Edge (KOTE) Urban Art Festival, June 19 - 25, Kingston
- Merritone Homecoming & Family Reunion, October 11 - 19, Kingston & Montego Bay, St. James
- Jamaica Sound System Festival, October 22 – 24, Richmond, St. Ann
- Rastafari Rootzfest, November 12 – 15, Negril, Westmoreland
- Spaces, December 1, Kingston
- Wickie Wackie Music Festival, December 5 – 6, Bull Bay, St. Thomas
- Rebel Salute, January 15 - 16, Richmond Estate, St. Ann
- 24<sup>th</sup> Annual Bob Marley Birthday Bash, February 1 – 6, Negril, Westmoreland
- Earth Hour Concert, March 19, Kingston

#### SPORTS:

- Tennis Events in Jamaica ITF Senior Championship, April 21 – 28, Montego Bay, St. James
- JHTA Charity Golf Tournament, April 26, Montego Bay, St. James
- Arthur Wylie Foundation Celebrity & Global Leader Golf Tournament, January 14 – 16, Montego Bay, St. James

#### ADVENTURE SPORTS:

- St. Ann Kite Festival, April 21, Seville Heritage Park, St. Ann
- 52<sup>nd</sup> Port Antonio International Marlin Tournament, October 16 – 26, Port Antonio, Portland
- Jamaica Fat Tyre, February 13 - 20, St. Mary, St. Thomas, Portland

#### ENDURANCE, HEALTH & WELLNESS:

- Mobay City Run, May 13, Montego Bay, St. James
- Disabled Peoples' International North America & Caribbean (DPINAC) Inc. Regional Assembly, June 16 – 18, Kingston
- RuJohn Foundation – Celebrity Sports Camp, June 21 - 27, Kingston

#### CULINARY:

- Westmoreland Mango Jam, April 19, Savanna La Mar, Westmoreland
- PAN X, June 23 – November 1, various locations Islandwide
- Portland Jerk Festival, July 5, Port Antonio, Portland
- Denbigh Agricultural Industrial & Food Show, July 31 – August 2, May Pen, Clarendon



- Montego Bay Jerk Festival, August 1, Montego Bay, St. James
- Port Morant Banana Festival, October 19, Port Maria, St. Mary
- Kingston Jerk & Gospel Music Festival, October 19, Kingston
- Nyam Jam Food & Music Festival, November 13 – 15, Oracabessa, St. Mary
- Annual Milk River Seafood & Jerk Festival, December 20, Milk River, Clarendon

#### FAITH BASED:

- Praise on the Beach, April 25, Montego Bay, St. James
- Spring Praise, March 31 – April 3, Folly, Portland

#### HERITAGE:

- St. Ann Kite Festival, April 21, Seville, St. Ann
- Misty Bliss, November 29, Holywell, St. Andrew
- Jamaica Kite Festival, March 27, Richmond, St. Ann
- St. Ann Kite Festival, March 28, Seville, St. Ann

#### FASHION/ BEAUTY/ LIFESTYLE

- Styleweek, May 19 – 24, Kingston
- Caribbean Fashion Week, June 11 – 15, Kingston
- Miss Jamaica World Beauty with A Purpose Pageant, June 21 – Dec. 31, Kingston
- Fashion Showcase Weekend, October 22 – 24, Montego Bay, St. James

#### CONFERENCE/ CONVENTION/ EXPO:

- JAMPRO Film Festival, July 7 – 11, Kingston
- Jamaica Bridal Expo, September 20 - 22, Montego Bay, St. James
- Jamaica Product Exchange (JAPEX), September 21-23, Montego Bay, St. James
- Florida Caribbean Cruise Association (FCCA), October 5 – 9, Miami, Florida USA
- The Women of the Diaspora Leadership Conference, October 9 – 11, Montego Bay, St. James
- Annual Seatrade Cruise Global, formerly known as (Seatrade) Cruise Shipping Miami Conference, March 14 - 17, Ft. Lauderdale, Florida, USA

#### EMANCIPENDENCE & DIASPORA HOMECOMING REUNIONS:

- Appleton Estate Dream Weekend, August 5 – 9, Negril, Westmoreland

#### CONTINGENCY/ SPECIAL PROJECTS:

- JAMAICA House 2015 at the 2015 IAAF World Championships, Beijing, China

## **JAMAICA SPORT**

Jamaica Sport is a unit within the Jamaica Tourist Board, the core objectives of which is to invest in sporting opportunities that will generate positive returns for Jamaica and promote the island as the premier sport tourism destination in the region. This will focus on four (4) key areas:

1. To develop mechanisms to bid on/host strategically important sport events and indicate the number, type and allocation of funding for each category of sport events that will be hosted/supported/facilitated over the short (1-3 years), medium (4-10 years) and long (over 10 years) term.
2. To develop a methodology and system to identify and select key sport events to be endorsed/sponsored by JAMAICA SPORT, which is aimed at boosting tourist arrivals and raising the stature of Jamaican athletes and Jamaica as a major sport destination in the region.
3. To coordinate the development of an economic model to assess sport events and their impact on Jamaica's economy.
4. To nurture world class talent as an important component of an Athlete Ambassador type programme that capitalises on Brand Jamaica and raises the public relations profile of elite athletes for the country's economic benefit.

Presently, Jamaica Sport is targeting various sport events that will give Jamaica the competitive advantage as a potential host at both the professional and amateur levels; working closely with a number of special sport tour operators in source markets across North America, UK and Europe as well as our strategic airline and hotel partners to develop competitive packages. Jamaica Sport also wants support from local sporting bodies to look at mitigating their respective capacity constraints and identifying areas for growth/development within the context of sport tourism readiness. Jamaica Sport also has plans to acquire a tool to capture and measure both economic impact of events as well as media exposure value generated by events.

### **JAMAICA SPORT EVENTS SPONSORED:**

- JAKES OFF ROAD TRIATHLON, April 18, Treasure Beach, St. Elizabeth
- ITF SENIOR CHAMPIONSHIP, April 21 - 26, Montego Bay, St. James
- CARIBBEAN BEACH VOLLEYBALL CHAMPS, April 30 – May 4, Ocho Rios Bay Beach, St. Ann
- JAMAICA INT'L INVITATIONAL MEET (JIIM), May 9, Kingston
- WI VS ENGLAND/AUSTRALIA TEST SERIES, June 2015, Kingston
- Makka Pro Surf Contest, July 20 - 27, Yallahs, St. Thomas

- Caribbean Amateur Golf Championship, July 27 - 31, Montego Bay, St. James
- Jamaica International Masters Tournament, August 1, Montego Bay, St. James
- The BREDS Treasure Beach T20 Cup, September 13 – 27, Treasure Beach, St. Elizabeth
- Caribbean Gymnastics Championship, November 14 - 15, Kingston
- UWI Volleyball Invitational, November 18 - 20, Kingston
- Reggae Marathon, December 3 - 5, Negril, Westmoreland
- 2nd Female Beach Volleyball Olympic Qualifier, January 29 – February 1, Ocho Rios, St. Ann
- AISK Sports Feva, February 26 - 27 & March 6, Kingston & Portmore, St. Catherine
- Kingston City Run, March 13, Kingston
- Badminton International, March 17 - 20, Kingston
- Venus Invitational (Volleyball) Tournament, March 18 - 20, GC Foster College, St. Catherine

## **MANAGEMENT INFORMATION SYSTEMS**

The main functions of the unit (which is a division in the Corporate Services Department) are:

- To deploy applications and tools to facilitate the timely distribution of critical information used for decision making within the organization and by extension the tourism industry
- To initiate technological innovations and that will allow the JTB to significantly improve its in-house operations as well as employ new and emerging technologies to enhance the marketing process
- To liaise internally and with external partners in the development of technology based initiatives in support of the marketing and advertising efforts of the Board
- To provide support for the in-house IT infrastructure and applications along with the related business processes

During the course of the year under review, the unit carried out the following activities/operations:

- ❖ Cloud based service migrations
  - Completed email services migration from Lotus Domino to MS office 365 E1 service plan
  - Completed setup and migration of email archives facilities to the cloud
  - Consolidated all JTB email domains under single visitjamaica.com

- Leveraged office productivity utilities within the MS office 365 E1 plan – include file sharing and collaboration utilities
- Assessed / recommended data mining and business intelligence utilities
- ❖ Websites
  - Developed revised templates and workflows for redesign of jtbonline.org (TIPS)
  - Commenced TIPS data migration exercises to move to new platform
  - Conducted visitjamaica.com technical review
- ❖ Customer Relationship Management (CRM)
  - Prepared RFP for selection of corporate CRM solution
  - Conducted assessment and recommendation of CRM
  - Commenced CRM planning and implementation exercises
- ❖ Data entry / MIST
  - Conducted revised immigration card data entry simulation exercise to assess potential to reduce turnaround time using PICA captured data
  - Explored upgrade path for Management Information System for Tourism used to support the immigration card data entry activities
- ❖ General Administration
  - Conducted and monitored health/security checks to maintain integrity of systems and data
  - Provided technical support to staff worldwide and responded to help desk issues
  - Provided operational support to functional units

## **REGIONAL OFFICE**

**The JTB's Regional Office** continued to provide support at the local level to various JTB programmes by facilitating:

- Travel agent familiarization trips
- Visitor Relations
- Press Trips (in support of the Marketing Department)
- Meet the People Programme
- Special events and promotions
- Industry liaison (with JHTA and Resort Boards)

- Community liaison (with Chambers of Commerce, Service Clubs, local schools' career day activities, etc.)
- Information and facilitation services at the island's international airports (mainly MBJ)

### **2015/2016 Travel Agent/Tour Operator Arrivals**

Travel agents and tour operators were guests of the Jamaica Tourist Board. These tours served mainly to update the travel agents and tour operators on the destination (accommodations/ attractions/other offerings)

**United States – 330**

**Canada – 139**

**United Kingdom & Europe – 140**

**Caribbean – 27**

**Latin America - 225**

Greater emphasis has been placed on the Caribbean market (hence the increase in the number of Travel Agents visiting) to ensure that there is growth seen from the region. As such, the JTB partnered with the JHTA on a specialized Sales Blitz in the Cayman Islands. In 2016/17 there will be even more sales blitzes carried out and reported on. These blitzes will be in collaboration with the JHTA and will, in some instances, centre around special events in the markets of interest - Trinidad, Cayman Islands and the Bahamas.

**The Visitor Relations Unit** continued to provide the following:

- Assistance to visitors in need, islandwide, on a wide-ranging basis
- Handle all complaints from visitors against hotels/other accommodations/ transportation/ attractions etc.
- Airport (MBJ):
  - Provide information on Jamaica's product to arriving visitors
  - Assistance with hotel reservations and other needs
  - Execute VIP meet/greet to arriving guests and VIP cardholders
  - Assist with the monitoring of immigration line to expedite the process
  - Escort and assist groups/individuals to Customs and ensure clearance of equipment
  - Liaise with Customs on re-exportation of equipment in bond
- Preparation of all documents to Customs regarding clearance of items taken in by groups/persons for events on island.
- Preparation of requisite letter to Customs for In bond trade

- Extend Airport Meet & Greet Courtesies to:
  - VIP Card Holders - 300
  - Travel Specialists - 395
  - Others: - 5,780
  - Groups/Weddings, Honeymoon/Conventions, Meeting Planners
- Hotel Reservations - 85 reservations for 70 visitors

### **Meet- The-People Unit**

Since the inception of the Meet-The-People programme in 1968 its objective has been to foster an exchange of cultures with our overseas visitors, thereby promoting a positive image of Jamaica and creating lasting friendships. The Programme continues to expand with a greater awareness and participation through social media.

This year, 287 persons participated in the Meet-the-People experience. The visitors were entertained by the MTP Volunteers at their homes, places of business, restaurants, hotels, educational and health institutions etc. Participating media groups throughout the year resulted in positive feedback and publicity.

Most enquiries were received from the United States, Canada and the United Kingdom.

The Meet-the-People programme is promoted on the Board's website, in the regional offices, the hotels and at special promotional events. It remains one of the most outstanding and vibrant programmes developed by the Board. The Meet-the-People programme has impressed other destinations, some of which have developed similar concepts in their tourism programme.

## **AWARDS & RECOGNITION**

The Jamaica Tourist Board and Jamaica continued to reap accolades and worldwide recognition during the year under review, including several top awards at the internationally recognized **World Travel Awards** in November 2015:

- Caribbean's Leading Tourist Board (Jamaica Tourist Board)
- Caribbean's Leading Airline (Caribbean Airlines)
- Caribbean's Leading Airport (Sangster International Airport)
- Caribbean's Leading Airport Lounge (Club Mobay, Sangster International Airport)

- Caribbean's Leading Cruise Destination (Jamaica)
- Caribbean's Leading Cruise Port (Ocho Rios)
- Caribbean's Leading Destination (Jamaica)
- Caribbean's Leading Meetings & Conference Centre (Montego Bay Convention Centre)
- Caribbean's Leading Tour Operator (GO! Jamaica Travel)

#### **OTHER AWARDS:**

##### **BAXTER TRAVEL MEDIA AWARDS**

Favourite Tourist Board in Canada

##### **DESTINATION WEDDINGS & HONEYMOONS MAGAZINE**

Category: Best Wedding Destinations

##### **EXPEDIA**

Caribbean Destination Campaign of the Year: Jamaica Tourist Board

##### **TRIPADVISOR TRAVELERS' CHOICE AWARDS**

Category: Best Destination – Caribbean; Winners: Ocho Rios and Negril

## **PRODUCT/LICENSING**

Although Product-related matters are under the portfolio responsibility of the Tourism Product Development Company Limited (TPDCo.), the Jamaica Tourist Board retains the authority for licensing of tourism entities, as required by the Tourist Board Act. In 2015/16, licences were approved for 5,883 entities as set out hereunder:

<b>ENTITIES</b>	<b>RENEWAL</b>	<b>NEW</b>	<b>TOTAL</b>
ATTRACTION	18	10	28
BIKE	05	-	05
CAR RENTAL	43	09	52
CONTRACT CARRIAGE	4,445	122	4,567
DOMESTIC TOUR	107	19	126
WATERSPORTS	91	10	101
HOTELS	-	02	02
NON HOTEL	-	08	08
TRAVEL HALT	-	01	1
PLACE OF INTEREST	-	01	01
CRAFT	926	66	992
TOTAL	5,635	248	5,883



## **STATISTICS**

### **INTERNATIONAL**

The year 2015 was the sixth consecutive year of above-average growth, in international travel. The World Tourism Organization (UNWTO) reported that International tourist arrivals grew by 4.4% in 2015, reaching a 1,184 million.<sup>7</sup> Tourism demand was strong overall, with mixed results across individual destinations.

All world regions, with the exception of Africa, recorded growth in international tourist arrivals for 2015. The strongest growths were registered in Europe, the Americas and Asia and the Pacific with 5.0%, 4.9% and 4.8% respectively. At slightly lower rate of growth was the Middle East with 3.1%, and Africa with a decline of 3.3%. Europe, the most visited region with over half the world's international tourists, saw an increase of 29 million arrivals in 2015, reaching a total of 609 million. The second most visited region in the world, Asia and the Pacific, increased by 13 million more arrivals to a total of 277 million. The Americas, to which Jamaica is a part, with a growth of 4.9%, welcomed an additional 9 million international tourists, raising the total to 191 million. Growth was driven by the Caribbean posting a growth of 7.0%, with 28.7 million arrivals.

### **CARIBBEAN**

The Caribbean Tourism Organization (CTO) reported that in 2015 there was a strong demand for travel to the region and a record 28.2 million visitors came to 'enjoy the un-equalled and diverse experiences' the Caribbean had to offer. This was 1.7 million more tourist arrivals, a 6.4% increase over in 2014<sup>8</sup>

The Caribbean region demonstrated that it's diversity of cultures to its authentic natural experiences, offered numerous enjoyable, refreshing and relaxing encounters. This is an indication that stability has returned to the main tourist generating markets and consumer confidence continues to grow. The United States remained the most important supplier of tourists to the region with a growth of a 6.3% increase in arrivals. Approximately 14 million Americans visited the region with most arriving in Dominican Republic, Jamaica, Puerto Rico

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<sup>7</sup> UNWTO World Tourism Barometer – Volume 14 January 2016.

<sup>8</sup> Caribbean Tourism Annual Statistical Report 2015.

and The Bahamas. Canadian arrivals showed increased growth in arrivals of 4.5%, arrivals from Europe increased by 4.3% and Intra-regional travel as a whole grew by 11.4%.

CARIBBEAN TOURISM PERFORMANCE BY MAIN MARKET REGIONS						
MAJOR MARKET	2011	2012	2013	2014	2015	%CH.
USA	11,390.6	11,972.7	12,329.9	13,325.5	14,133.5	6.1%
CANADA	2,869.8	3,057.4	3,075.9	3,277.0	3,424.1	4.5%
EUROPE	4,602.4	4,600.6	4,596.8	4,870.6	5,060.1	3.9%
CARIBBEAN	1,560.3	1,552.6	1,568.3	1,549.4	1,653.2	6.7%
SOUTH AMERICA	1,189.8	1,393.5	1,530.7	1,744.6	2,021.9	15.9%
OTHER	1,433.0	1,549.6	1,805.0	1,702.5	1,861.2	9.3%
<b>TOTAL TOURIST ARRIVALS ('000)</b>	<b>23,045.9</b>	<b>24,126.4</b>	<b>24,906.6</b>	<b>26,469.6</b>	<b>28,154.0</b>	<b>6.4%</b>
Source Caribbean Tourism Organization						

The top three most visited islands in the region were: Dominica Republic, Cuba, and Puerto Rico, in descending order of importance. Overall, the CARICOM countries recorded a 3.9% growth for 2015; the Dutch Caribbean, aided by the performances of Aruba (14.3%), had one of the highest growth rates, much more than the regional growth, recording an 8.1% increase over 2014. The performance of the Spanish speaking Caribbean upheld its dominance in total arrivals, receiving 46.9% of tourist arrivals, with a positive growth of 9.4% increase over 2014.

The Caribbean Cruise sector is estimated to have increased by 2.5% in passenger arrivals during 2015, to approximately 26 million. Sixteen of the twenty-six destinations recorded increased cruise activity in 2015 over 2014. The Bahamas Islands, Cozumel, St. Maarten, US Virgin Islands, and Cayman Islands are the top five most popular Caribbean Cruise ship destinations within the region, which is approximately 52% of the market and over 13.4 million passengers.

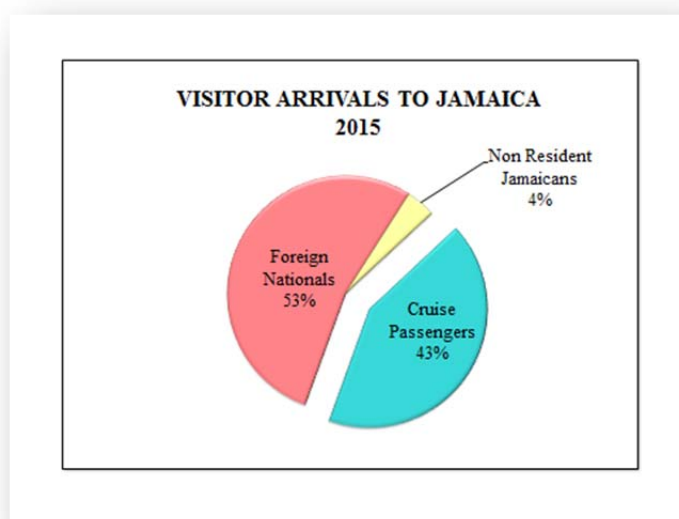
A subset of the cruise passenger arrivals in 2015 are compared with 2014 figures<sup>9</sup>.

<sup>9</sup> Caribbean Tourism Annual Statistical Report 2015

<b>Cruise Passenger Arrivals - 2015 &amp; 2014</b>			
<b>Destination</b>	<b>2015</b>	<b>2014</b>	<b>% Change</b>
Bahamas	4,513.5	4,804.7	-6.1%
Cozumel	3,396.1	3,404.9	-0.3%
St. Maarten	1,901.6	2,002.0	-5.0%
US Virgin Islands	1,878.8	2,083.9	-9.8%
Cayman Islands	1,716.8	1,609.6	6.7%
Jamaica	1,568.7	1,423.8	10.2%
Puerto Rico	1,457.2	1,356.8	7.4%
St. Kitts & Nevis	990.4	694.7	42.6%
Belize	958.0	968.1	-1.0%
Turks & Caicos Islands	929.7	971.8	-4.3%
St. Lucia	677.4	641.5	5.6%
Haiti	673.5	662.4	1.7%
Antigua and Barbuda	644.3	522.3	23.4%
Aruba	607.0	667.1	-9.0%
Barbados	586.6	557.9	5.1%
Curacao	565.8	629.1	-10.1%
Dominican Republic	529.0	435.5	21.5%
British Virgin Islands	516.4	360.9	43.1%
Bermuda	370.8	355.9	4.2%
Grenada	280.5	235.1	19.3%
Dominica	279.5	286.6	-2.5%
Martinique	241.6	177.8	35.9%
Source: CTO data supplied by member countries			

## **VISITOR ARRIVALS TO JAMAICA**

- Total stopover arrivals of 2,123,042 increased by 2.1%
  - Foreign Nationals of 1,973,217 increased by 2.3%
  - Non-resident Jamaicans of 149,825 decreased by 0.6%
- Cruise passenger arrivals of 1,568,702 increased by 10.2%



## **STOPOVERS**

Total stopover arrivals in 2015 exceeded the 2 millionth marker to reach a record of 2,123,042, which was 2.1% above the 2,080,181 arrivals recorded in 2014. This figure represents 42,861 more stopovers than in 2014. In the first quarter of 2015, Jamaica recorded a 0.2% negative growth in stopover arrivals over the 2014 figures. During the second quarter this growth rose to 3.1%. In the third quarter this growth was 5.0%. In the last and final quarter of 2015, this strong growth continued and ended with a growth of 7.0%. This growth was led by the increase of 9.8% in arrivals during the month of October.

Tourist arrivals in 2015 outperformed those in each quarter of 2014, with growth rates of - 2.1%, 4.5%, 6.8% and 15.9%, for quarters 1 to 4, in that order.

The main factors that may be identified as having had an impact on Jamaica's stopover arrivals during 2015 were as follows:

- Maintaining high visibility in the traditional market places of North America, Latin America and Europe through an integrated promotional and communications programme.
- The advertising campaign “Home of All Right” continued to be a major support for enticing visitors with the message that Jamaica is more than a vacation destination; instead it is a brand that feeds a greater world need. The campaign was used in all opportunities to support the proposition that Jamaica is a place to visit and be seen.
- Jamaica’s destination website continued to be used as the primary “call to action” for advertisements and promotion. The website is considered to be a repository of destination activities, accommodations, and the unique elements that make the island appealing to the traveler, but also the trusted source of information about all things Jamaican. In 2015, the Jamaica Tourist Board focused on enhancing the content on [www.visitjamaica.com](http://www.visitjamaica.com), paying special emphasis on sports and culture, as well as utilizing the new tagline “Jamaica: Home of All Right”.
- Representation at major trade events in emerging markets such as Brazil, other Latin American Markets, Continental Europe and China.
- Increased airlift and Visa facilitation for nationals were strategies used to develop and increase market share from these emerging markets.
- A number of hotels that changed ownership and management in 2013 re-opened, resulting in the availability of more rooms in 2015.
- On-island Travel Agents’ Familiarization tours with reps from the USA, Canada, Europe and Latin America, continued to educate travel agents on the Jamaican Tourism Product.

Destination Jamaica continues to offer a diverse product of very high quality to its visitors, through its expansive and inclusive nature in 2015. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations, unequalled visitor experiences and provide value for money.

### **Average Length of Stay**

In 2015 the overall average intended length of stay for foreign nationals was 8.8 nights; compared to 8.7 nights recorded in 2014. This is two less nights spent in Jamaica than those visitors who stayed in Jamaica during the early 1990’s, when the intended length of stay was over eleven nights. Those 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.

American visitors, on the average, stayed 7.6 nights, while Canadians stayed an average of 9.0 nights. Visitors from the United Kingdom recorded an average length of stay of 15.3 nights and those visitors from Continental Europe stayed 12 nights.

### **Purpose of Visit**

Of the 2,123,042 stopover arrivals who visited the island during 2015, a total of 1,604,302 or 75.6% were visiting for the purpose of leisure, recreation and holiday; 13.8% were visiting Friends and Relatives, 4.7% were on business, and the remaining 5.9% were on other or unstated purposes.

### **Hotel Room Occupancy**

The average available room capacity rose by 3.2% in 2015, moving from 18,409 rooms in 2014 to 19,005 rooms in 2015. Total room nights sold of 4,783,862 in 2015 was up 4.6% above the 4,572,184 room nights sold in 2014. Hotel room occupancy grew by 1.0 percentage point to 69.0%, compared to the 68.0% level in 2014. The number of stopovers that intended to stay in hotel accommodations increased from 1,426,002 in 2014 to 1,434,750, an increase of approximately 1% in 2015.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 73.0%, which was up by 1.0% from the 72.3% recorded in 2014. The total number of room nights sold increased by 15.5%, moving from 1,686,627 in 2014 to 1,947,392 in 2015. The average room capacity increased by 14.3% in 2015, moving from 6,388 rooms in 2014 to 7,304 rooms in 2015. The number of stopovers that intended to stay in hotel accommodations increased from 569,653 in 2014 to 609,442, an increase of 7.0% in 2015.

The average hotel room occupancy rate for Ocho Rios was 69.0%, which was 2.5 percentage points lower than the 71.5% recorded in 2014. The total number of hotel room nights sold moved from 1,333,362 in 2014 to 1,252,434 in 2015 a decrease of 6.1%. The number of stopovers that intended to stay in hotel accommodations recorded a similar decrease, moving from 405,164 in 2014 to 379,021, and a decrease of 6.5% in 2015.

The resort area of Negril recorded an average hotel room occupancy rate of 66.8% in comparison to the rate of 63.5% in 2014. The number of hotel room nights sold in this resort area increased by 0.7%, recording 1,190,791 room nights sold compared to 1,182,882 sold in 2014. The average room capacity decreased by 4.3% in 2015, moving from 5,103 rooms in 2014 to 4,885 rooms in 2015. The number of stopovers that intended to stay in hotel accommodations decreased from 356,731 in 2014 to 352,270, a decrease of 1.3% in 2015.

In the Mandeville/Southcoast resort area, average hotel room occupancy rate decreased by 1.2 percentage points, moving from 60.0% in 2014 to 58.8% in 2015. Room nights sold increased from 119,316 in 2014 to 126,956 being sold in 2015.

Kingston & St. Andrew achieved a hotel room occupancy level of 62.3%, which was 5.2 percentage points higher than the 57.1% recorded in 2014. The number of room nights sold in Kingston & St. Andrew increased by 5.5%, moving from 245,290 in 2014 to 258,799 in 2015.

Hotel room occupancy for the resort area of Port Antonio was 18.0%, which was 2.6 percentage points above the level of 15.4% recorded in 2014. The number of room nights sold in Port Antonio increased from 4,707 in 2014 to 7,490 in 2015.

Overall, the all-inclusive hotel room occupancy rate increased to 75.8% which was 1.1 percentage points above the level of 74.7%, as recorded in 2014. Non all-inclusive room occupancy rate moved from 44.2% in 2014 to 45.3% in 2015.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 35.7%. Hotels with 51 – 100 rooms, achieved a rate of 46.7%. The number of stopovers that intended to stay in hotels with less than 100 rooms increased from 123,270 in 2013 to 127,453, an increase of 3.4% in 2015. Hotels in the size range of 101 – 200 rooms recorded an occupancy rate of 68.2%, and hotels with over 200 rooms achieved a room occupancy rate of 76.9%. The number of stopovers that intended to stay in hotels with more than 100 rooms was 1,298,660 which was the same level as in 2014 of 1,298,785.

## **Visitor Expenditure**

Gross visitor expenditure in 2015 was estimated at approximately US\$2.402 billion. This represents an increase of 7.0% against the estimated US\$2.244 billion earned in 2014.

Total expenditure of Foreign Nationals amounted to US\$2.188 billion. Cruise passenger expenditure totaled US\$0.137 billion while US\$0.077 billion was estimated as the contribution of Non-Resident Jamaicans.

Foreign Nationals spent on the average US\$126 per person per night while cruise passengers spent an average of US\$87 per person per night.

## **Direct Employment in the Accommodation Sector**

The number of persons employed directly in the accommodation sub-sector moved from 35,166 in 2014 to 39,255 in 2015, an increase of 11.6%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 34,700 persons or 93.1% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 15,530 direct jobs represented 39.3% of those employed, Negril with 9,712 direct jobs, accounted for 24.7%, and Ocho Rios with 9,458, was responsible for 21.1%. Kingston, Port Antonio and the South coast accounted for the remaining 11.5% of employment in the accommodation sector.

The average number of employees per room in 2015 was estimated at 1.22.

## **New Developments 2016**

### **Airlift**

- Jet Blue Airlines is scheduled to increase operations out of New York in both International Airports.
- Southwest Airlines is to begin operations out of Hobby, Houston during the summer months.
- American Airlines will be offering non-stop service out of Los Angeles, California.
- Thomsonfly to introduce service into Sangster's International Airport from Dublin, Ireland.



## Accommodations

- The former 232 room Braco Beach Resort & Spa Hotel has been renovated and re-opened under the new brand name Melia Braco Village.
- Construction began on a new hotel on Cornwall Beach consisting of 142 rooms; upon completion it will be opened under the Royal Decameron brand.
- An additional 225 rooms are undergoing construction at the Royalton Whitesands resort in Trelawny.
- Sandals Royal Caribbean began construction of five (5) "Over-the-Water" Bungalows.
- The former Breezes Montego Bay began renovations and is to be re-named Spanish Court II.
- Azul Sensatori in Negril began construction of 150 additional rooms.
- The former Grand Lido Negril resort has been demolished, to make grounds for the new Royalton Negril.
- Breathless (AM Resort) and RIU Reggae are two new resorts under construction, with 150 and 450 rooms respectively. Both are expected to be completed by the end of 2016.
- The 705 room Moon Palace resort re-opened in early 2015.
- The Courtyard Marriott opened with 130 rooms in Kingston.



# **APPENDIX I**

**See Tables taken from the**  
**Jamaica Tourist Board's Annual Travel Statistics for 2015**  
**on the following pages**

## SUMMARY OF MAIN INDICATORS

	2014	2015	%Change 2015/2014
<b>TOTAL STOPOVERS</b>	<b><u>2,080,181</u></b>	<b><u>2,123,042</u></b>	<b><u>2.1</u></b>
Foreign Nationals	1,929,454	1,973,217	2.3
Non-Resident Jamaicans	150,727	149,825	-0.6
<b>MARKET REGION</b>	<b><u>2,080,181</u></b>	<b><u>2,123,042</u></b>	<b><u>2.1</u></b>
From U.S.A.	1,296,457	1,344,149	3.7
Canada	419,898	391,409	-6.8
Europe	261,081	279,332	7.0
Caribbean	59,057	62,612	6.0
Latin America	29,263	29,387	0.4
Asia & Pacific	8,194	9,238	12.7
Other Countries	6,231	6,915	11.0
<b>CRUISE SHIP PASSENGERS</b>	<b><u>1,423,797</u></b>	<b><u>1,568,702</u></b>	<b><u>10.2</u></b>
<b>TOURIST ACCOMMODATION</b>	<b><u>26,888</u></b>	<b><u>28,408</u></b>	<b><u>5.7</u></b>
<b>Hotel Rooms *</b>	<b><u>20,310</u></b>	<b><u>21,454</u></b>	<b><u>5.6</u></b>
All-Inclusive	15,418	16,360	6.1
Non All-Inclusive	4,892	5,094	4.1
<b>Other Rooms</b>	<b><u>6,578</u></b>	<b><u>6,954</u></b>	<b><u>5.7</u></b>
Guesthouses	3,162	3,396	7.4
Resort Villas & Cottages	2,805	2,944	5.0
Apartments	611	614	0.5
Hotel Room Nights Sold	4,572,184	4,783,862	4.6
Average Hotel Room Nights Available	6,719,285	6,936,825	3.2
Average Hotel Room Occupancy	<b><u>68.0</u></b>	<b><u>69.0</u></b>	<b><u>1.3</u></b>
All-Inclusive Hotels	74.7	75.8	1.5
Non All-Inclusive	44.2	45.3	2.5
<b>AVERAGE LENGTH OF STAY</b>			
Foreign Nationals	8.7	8.8	1.1
Non-Resident Jamaicans	16.5	16.4	-0.6
<b>VISITOR EXPENDITURE (US\$ MILLION)</b>	<b><u>2,244</u></b>	<b><u>2,402</u></b>	<b><u>7.0</u></b>
Stopovers	2,126	2,265	6.5
Cruise Passengers	118	137	16.5
<b>EMPLOYMENT IN ACCOMMODATION SECTOR</b>	<b><u>35,166</u></b>	<b><u>39,255</u></b>	<b><u>11.6</u></b>

\* Excluding Closed Rooms

**TABLE 1**  
**VISITOR ARRIVALS TO JAMAICA**  
**2001 - 2015**

	STOPOVERS	CRUISE PASSENGERS <sup>1</sup>
2001	1,276,516	841,412
2002	1,266,366	866,226
2003	1,350,285	1,133,411
2004	1,414,786	1,102,510
2005	1,478,663	1,137,250
2006	1,678,905	1,337,993
2007	1,700,785	1,180,733
2008	1,767,271	1,093,273
2009	1,831,097	923,234
2010	1,921,678	909,976
2011	1,951,752	1,127,012
2012	1,986,085	1,320,547
2013	2,008,409	1,265,693
2014	2,080,181	1,423,797
2015	2,123,042	1,568,702

<sup>1</sup> Includes Armed Forces on Naval Vessels

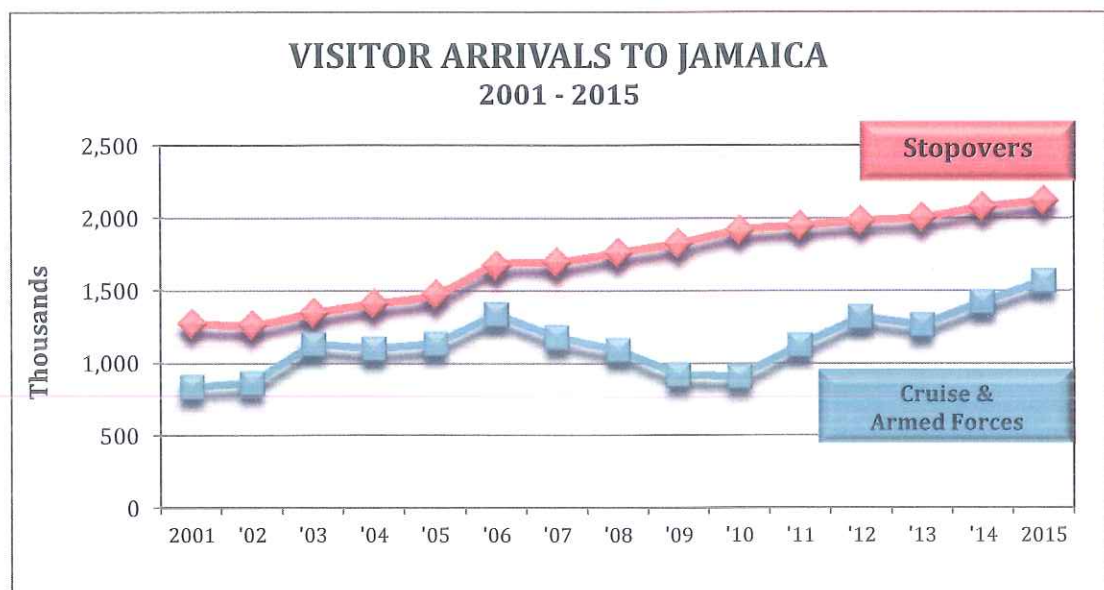
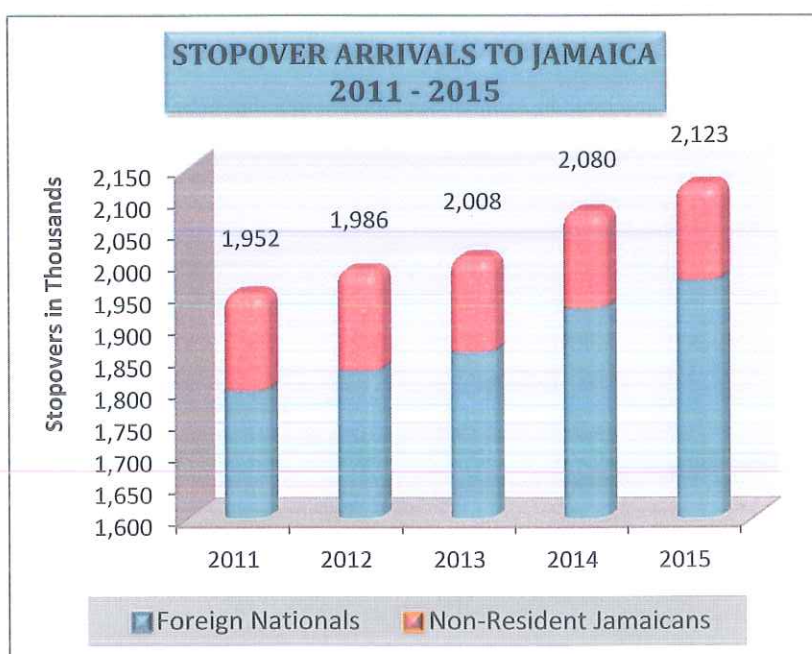


Fig. 1

**TABLE 2****TOTAL STOPOVER ARRIVALS BY MONTH: 2011 - 2015**

	2011	2012	2013	2014	2015
<b>January</b>	174,144	169,355	161,455	169,280	176,621
<b>February</b>	175,114	180,595	166,010	169,328	177,805
<b>March</b>	204,046	204,724	213,109	200,732	212,134
<b>April</b>	179,444	180,511	171,630	181,664	189,903
<b>Jan.-Apr.</b>	<b>732,748</b>	<b>735,185</b>	<b>712,204</b>	<b>721,004</b>	<b>756,463</b>
<b>May</b>	146,583	157,233	160,785	166,249	168,347
<b>June</b>	166,545	179,814	186,481	187,083	182,364
<b>July</b>	202,493	209,824	205,655	221,006	220,662
<b>August</b>	155,133	157,863	164,336	171,486	169,063
<b>September</b>	98,280	104,360	105,426	106,757	114,280
<b>October</b>	112,536	111,253	123,663	135,730	134,317
<b>November</b>	139,721	138,395	148,512	157,737	158,450
<b>December</b>	197,713	192,158	201,347	213,129	219,096
<b>May - Dec.</b>	<b>1,219,004</b>	<b>1,250,900</b>	<b>1,296,205</b>	<b>1,359,177</b>	<b>1,366,579</b>
<b>Jan. - Dec.</b>	<b>1,951,752</b>	<b>1,986,085</b>	<b>2,008,409</b>	<b>2,080,181</b>	<b>2,123,042</b>
<b>% Inc./Dec.</b>	<b>1.6</b>	<b>1.8</b>	<b>1.1</b>	<b>3.6</b>	<b>2.1</b>

**Fig. 2**



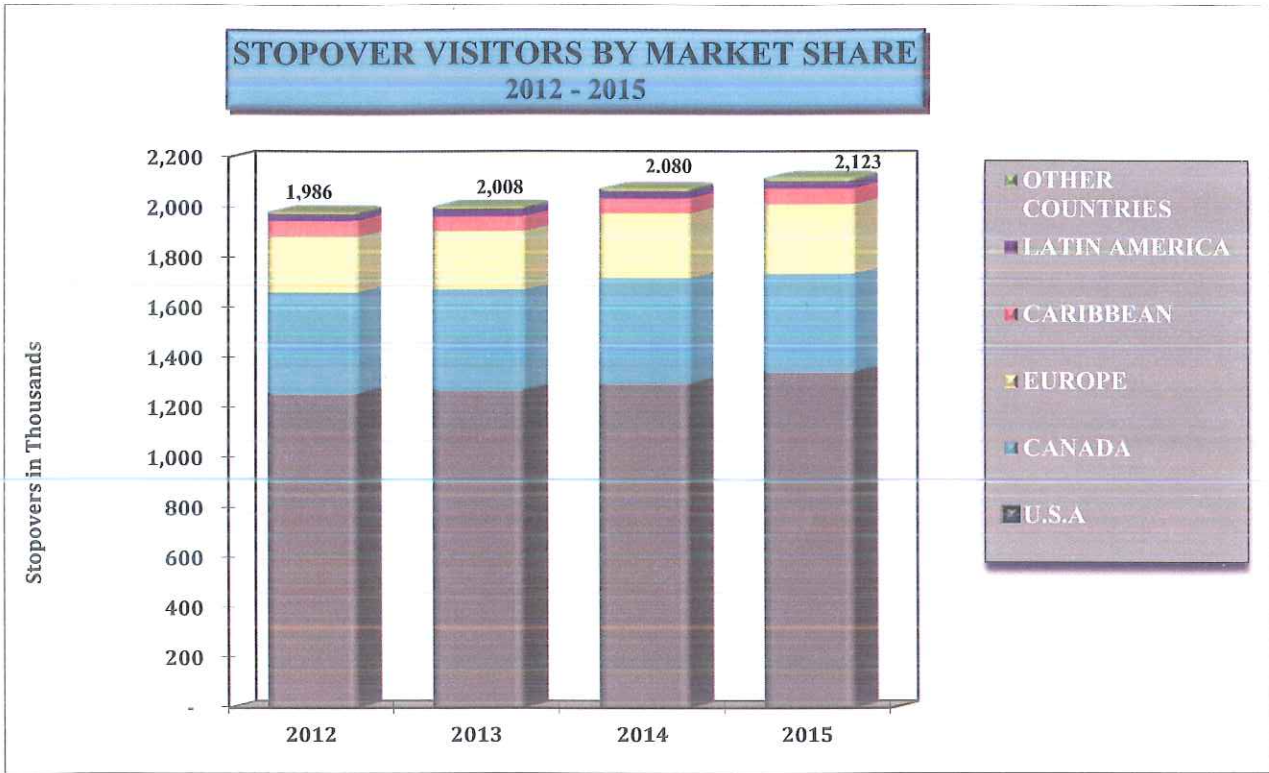


Fig. 4

Countries	Stopovers in Thousands								%Change 2015/14
	2012	%Share	2013	%Share	2014	%Share	2015	%Share	
U.S.A.	1,257.7	63.3	1,271.3	63.3	1,296.5	62.3	1,344.1	63.3	3.7
Canada	403.2	20.3	399.3	19.9	419.9	20.2	391.4	18.4	-6.8
Europe	222.4	11.2	235.8	11.7	261.1	12.6	279.3	13.2	7.0
Caribbean	65.0	3.3	58.2	2.9	59.1	2.8	62.6	2.9	6.0
Latin America	25.0	1.3	30.5	1.5	29.3	1.4	29.4	1.4	0.4
Other Countries	12.8	0.6	13.2	0.7	14.4	0.7	16.2	0.8	12.0
Total	1,986.1	100.0	2,008.4	100.0	2,080.2	100.0	2,123.0	100.0	2.1

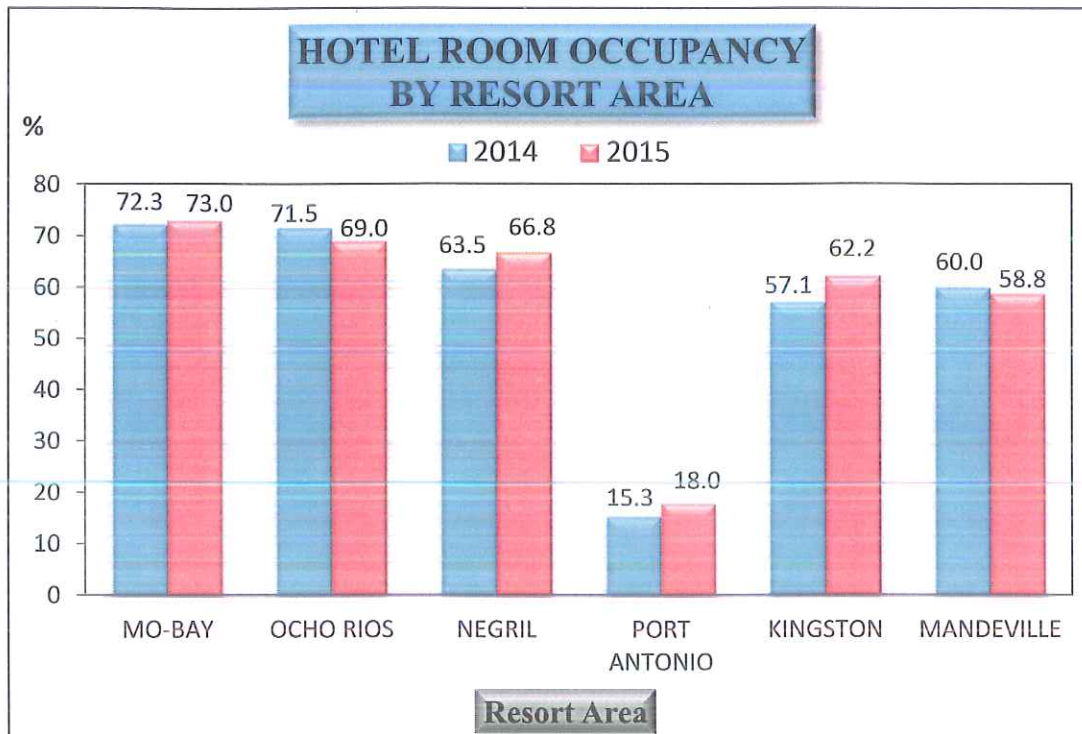


Fig.14

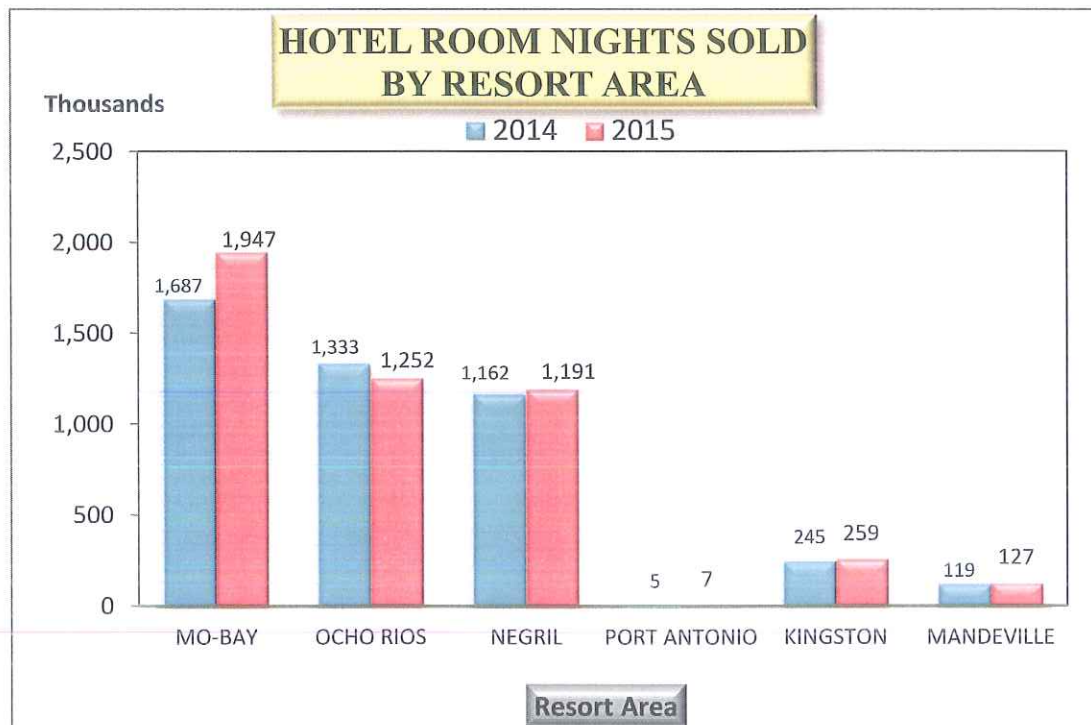


Fig.14a



**TABLE 26**  
**VISITOR ACCOMMODATION BY YEARS AND AREA**

**2012 - 2015**

	<b>R O O M S</b>				<b>%Change 2015/14</b>	<b>%Share 2015</b>	<b>B E D S</b>				<b>%Change 2015/14</b>	<b>%Share 2015</b>
	2012	2013	2014	2015			2012	2013	2014	2015		
<b><u>HOTELS</u></b>												
Kingston	1,728	1,446	1,446	1,668	15.4	7.8	3,495	2,931	2,937	3,367	14.6	7.6
Montego Bay	7,113	6,927	7,558	7,684	1.7	35.8	14,701	14,267	15,499	15,575	0.5	35.3
Ocho Rios	5,829	5,836	5,023	6,014	19.7	28.0	12,813	12,574	10,898	12,926	18.6	29.3
Negril	5,350	5,175	5,283	5,076	-3.9	23.7	10,844	10,475	10,697	10,296	-3.7	23.3
Port Antonio	209	182	183	173	-5.5	0.8	408	354	356	336	-5.6	0.8
Southcoast	745	793	817	839	2.7	3.9	1,530	1,626	1,624	1,644	1.2	3.7
<b>Total</b>	<b>20,974</b>	<b>20,359</b>	<b>20,310</b>	<b>21,454</b>	<b>5.6</b>	<b>100.0</b>	<b>43,791</b>	<b>42,227</b>	<b>42,011</b>	<b>44,144</b>	<b>5.1</b>	<b>100.0</b>
<b><u>GUEST HOUSES</u></b>												
Kingston	557	586	616	608	-1.3	17.9	1,105	1,233	1,293	1,277	-1.2	18.5
Montego Bay	499	525	531	565	6.4	16.6	980	1,045	1,055	1,133	7.4	16.4
Ocho Rios	433	363	390	458	17.4	13.5	872	726	782	918	17.4	13.3
Negril	766	737	772	787	1.9	23.2	1,534	1,476	1,550	1,582	2.1	22.9
Port Antonio	296	302	315	323	2.5	9.5	599	611	637	653	2.5	9.5
Southcoast	510	574	595	655	10.1	19.3	1,005	1,129	1,211	1,331	9.9	19.3
<b>Total</b>	<b>3,061</b>	<b>3,087</b>	<b>3,219</b>	<b>3,396</b>	<b>5.5</b>	<b>100.0</b>	<b>6,095</b>	<b>6,220</b>	<b>6,528</b>	<b>6,894</b>	<b>5.6</b>	<b>100.0</b>
<b><u>RESORT VILLAS</u></b>												
Kingston	12	0	0	0	-	0.0	24	0	0	0	-	0.0
Montego Bay	1,452	1,087	1,063	1,098	3.3	37.3	2,867	2,133	2,084	2,154	3.4	37.2
Ocho Rios	1,050	631	652	728	11.7	24.7	2,145	1,274	1,316	1,468	11.6	25.4
Negril	833	671	694	665	-4.2	22.6	1,652	1,327	1,373	1,331	-3.1	23.0
Port Antonio	294	235	248	261	5.2	8.9	592	456	483	512	6.0	8.8
Southcoast	160	148	181	192	6.1	6.5	297	273	318	322	1.3	5.6
<b>Total</b>	<b>3,801</b>	<b>2,772</b>	<b>2,838</b>	<b>2,944</b>	<b>3.7</b>	<b>100.0</b>	<b>7,577</b>	<b>5,463</b>	<b>5,574</b>	<b>5,787</b>	<b>3.8</b>	<b>100.0</b>

**TABLE 26a**  
**VISITOR ACCOMMODATION BY YEARS AND AREA**

**2012 - 2015**

	R O O M S				%Change		%Share		B E D S				%Change		%Share	
	2012	2013	2014	2015	2015/14	2015	2015/14	2015	2012	2013	2014	2015	2015/14	2015	2015/14	2015
<b>APARTMENTS</b>																
Kingston	71	71	78	78	0.0	12.7			142	142	156	156	0.0		12.5	
Montego Bay	198	128	128	128	0.0	20.8			396	256	256	256	0.0		20.5	
Ocho Rios	366	347	330	333	0.9	54.2			772	704	676	682	0.9		54.6	
Negril	35	49	49	49	0.0	8.0			76	104	104	104	0.0		8.3	
Port Antonio	10	10	10	10	0.0	1.6			20	20	20	20	0.0		1.6	
Southcoast	20	16	16	16	0.0	2.6			40	32	32	32	0.0		2.6	
<b>Total</b>	<b>700</b>	<b>621</b>	<b>611</b>	<b>614</b>	<b>0.5</b>	<b>100.0</b>			<b>1,446</b>	<b>1,258</b>	<b>1,244</b>	<b>1,250</b>	<b>0.5</b>		<b>100.0</b>	
<b>ALL TYPES OF ACCOMMODATION</b>																
Kingston	2,368	2,103	2,140	2,354	10.0	8.3			4,766	4,306	4,386	4,800	9.4		8.3	
Montego Bay	9,262	8,667	9,280	9,475	2.1	33.4			18,944	17,701	18,894	19,118	1.2		32.9	
Ocho Rios	7,678	7,177	6,395	7,533	17.8	26.5			16,602	15,278	13,672	15,994	17.0		27.5	
Negril	6,984	6,632	6,798	6,577	-3.3	23.2			14,106	13,382	13,724	13,313	-3.0		22.9	
Port Antonio	809	729	756	767	1.5	2.7			1,619	1,441	1,496	1,521	1.7		2.6	
Southcoast	1,435	1,531	1,609	1,702	5.8	6.0			2,872	3,060	3,185	3,329	4.5		5.7	
<b>Total</b>	<b>28,536</b>	<b>26,839</b>	<b>26,978</b>	<b>28,408</b>	<b>5.3</b>	<b>100.0</b>			<b>58,909</b>	<b>55,168</b>	<b>55,357</b>	<b>58,075</b>	<b>4.9</b>		<b>100.0</b>	

Note: 1) Visitor Accommodation excludes closed properties.

The Jamaica Tourist Board in consultation with the Tourism Product Development Co. continues to update the listing of accommodations offered.

Some accommodations have been removed from the listing because they are no longer being used as tourist accommodation.

2) The Guesthouse accommodation category since 2001 includes properties that offer Bed & Breakfast facilities.

**TABLE 27****EMPLOYMENT IN ACCOMMODATION SECTOR**

	2011	2012	2013	2014	2015
<b>MONTEGO BAY</b>	12,198	12,203	12,041	12,777	15,530
<b>OCHO RIOS</b>	8,964	9,306	8,609	8,406	9,458
<b>NEGRIL</b>	9,407	9,365	9,215	9,810	9,712
<b>KINGSTON</b>	2,182	2,203	1,679	1,760	1,982
<b>PORT ANTONIO</b>	1,118	1,072	1,094	1,113	1,182
<b>SOUTHCOST</b>	1,052	1,048	1,300	1,300	1,391
<b>TOTAL</b>	<b>34,921</b>	<b>35,197</b>	<b>33,938</b>	<b>35,166</b>	<b>39,255</b>

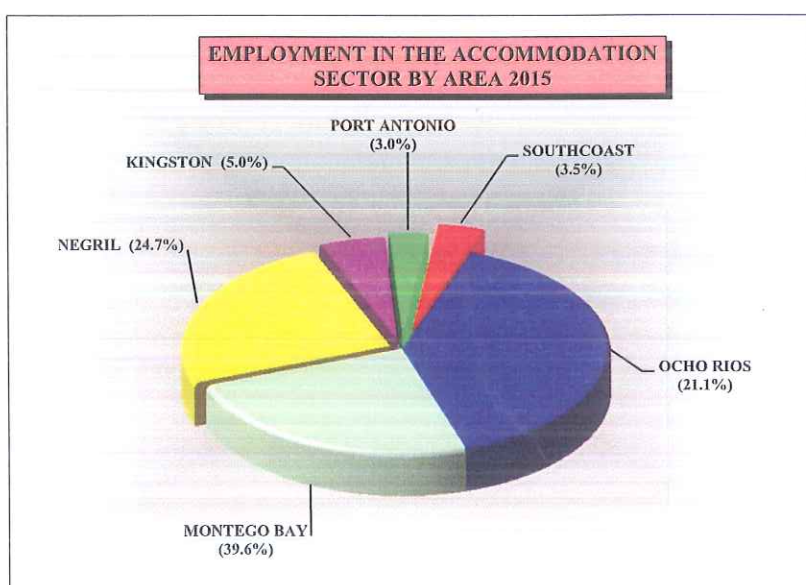




TABLE 28

**TOURIST BOARD BUDGET**

	APPROVED	
	J\$,000	US\$,000
1994/95	914,329	27,293
1995/96	1,154,037	30,189
1996/97	1,208,713	33,905
1997/98	1,254,860	35,428
1998/99	1,189,116	32,138
1999/00	1,535,950	38,351
2000/01	1,378,430	34,098
2001/02	1,951,764	41,527
2002/03	1,671,751	34,828
2003/04	1,487,926	29,759
2004/05	1,648,176	25,753
2005/06	1,905,380	30,244
2006/07	2,190,759	33,193
2007/08	2,594,236	39,011
2008/09	2,737,796	38,561
2009/10	3,113,302	37,523
2010/11	2,568,510	28,539
2011/12	2,401,040	27,598
2012/13	2,610,941	30,011
2013/14	2,823,516	29,108
2014/15	3,066,662	28,395
2015/16	3,971,506	35,193



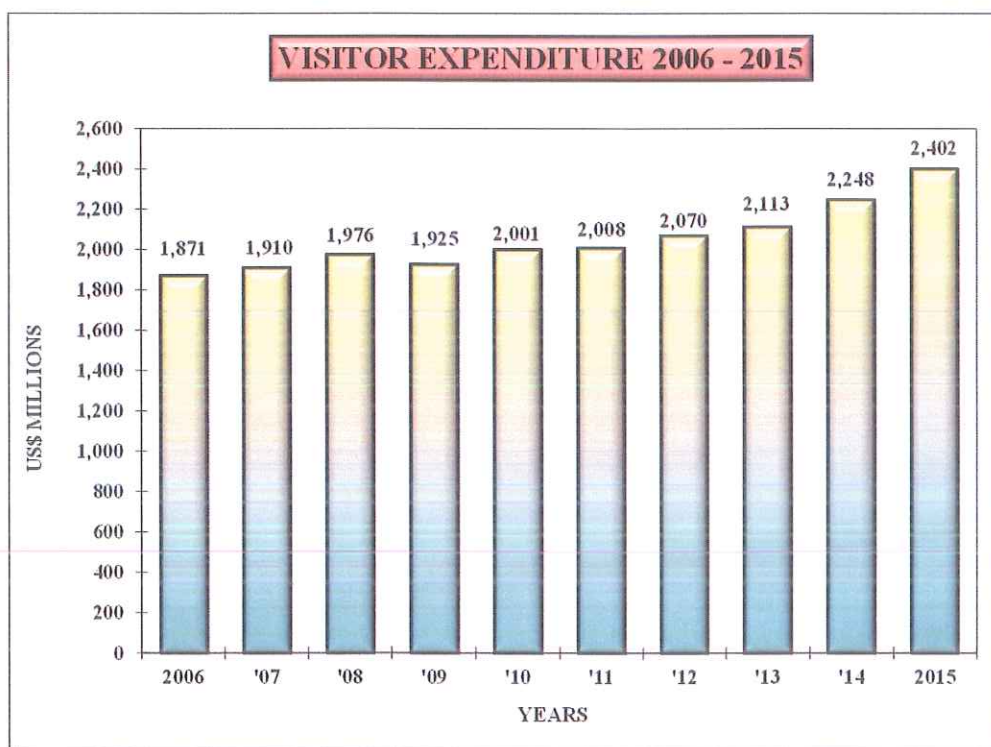
Fig. 21

- Note: 1. The Tourist Board's Budget is given on a fiscal year basis, i.e. April in one year to March 31 of the following year.
2. Exchange Rate for 2015/16 US\$1 = J\$112.85
3. Budget includes Funds from the Tourism Enhancement Fund as of 2008/09
4. Budget excludes the Budget for Jamaica Vacation Ltd.

**TABLE 29****ESTIMATED GROSS FOREIGN EXCHANGE EARNINGS**

	JS\$,000	US\$,000
		**
1998	43,875,181	1,197,140
1999	50,157,654	1,279,532
2000	57,408,286	1,332,597
2001	56,814,781	1,232,960
2002	58,708,353	1,209,484
2003	78,271,656	1,351,142
2004	88,119,633	1,436,577
2005	96,565,925	1,545,055
2006	123,232,473	1,870,560
2007	131,911,828	1,910,105
2008	144,054,881	1,975,519
2009	170,380,650	1,925,423
2010	174,868,701	2,001,244
2011	172,878,165	2,008,343
2012	184,170,856	2,069,568
2013	212,903,531	2,112,767
2014	250,004,097	2,247,834
2015	281,818,505	2,402,340

\*\* Exchange Rate used is taken from the Bank of Jamaica's published Average Annual Exchange Rate

**Fig. 22**

## **APPENDIX II**

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JAMAICA TOURIST BOARD

FINANCIAL STATEMENTS

MARCH 31, 2016



KPMG  
Chartered Accountants  
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Kingston  
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## INDEPENDENT AUDITORS' REPORT

To the Board of Management  
JAMAICA TOURIST BOARD

### **Report on the Financial Statements**

We have audited the financial statements of Jamaica Tourist Board ("the Board"), set out on pages 3 to 22, which comprise the statement of financial position as at March 31, 2016, the statements of profit or loss and other comprehensive income, changes in reserves and cash flows for the year then ended, and notes, comprising a summary of significant accounting policies and other explanatory information.

#### *Management's Responsibility for the Financial Statements*

Management is responsible for the preparation of financial statements that give a true and fair view in accordance with International Financial Reporting Standards, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

#### *Auditors' Responsibility*

Our responsibility is to express an opinion on the financial statements based on our audit. We conducted our audit in accordance with International Standards on Auditing. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance as to whether or not the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence relating to the amounts and disclosures in the financial statements.





Page 2

INDEPENDENT AUDITORS' REPORT (CONT'D)

To the Board of Management  
JAMAICA TOURIST BOARD

**Report on the Financial Statements (cont'd)**

*Auditors' Responsibility (cont'd)*

The procedures selected depend on our judgment, including our assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, we consider internal control relevant to the entity's preparation of financial statements that give a true and fair view in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

*Opinion*

In our opinion, the financial statements give a true and fair view of the financial position of the Jamaica Tourist Board as at March 31, 2016, and of its financial performance and cash flows for the year then ended in accordance with International Financial Reporting Standards.

**KPMG**

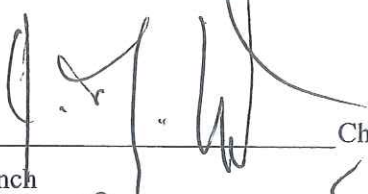
Chartered Accountants  
Kingston, Jamaica

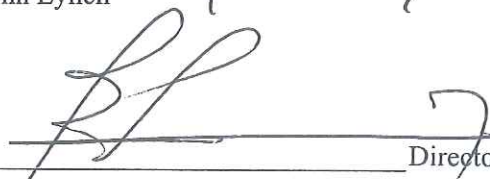
October 18, 2016

JAMAICA TOURIST BOARDStatement of Financial Position  
March 31, 2016

	<u>Notes</u>	<u>2016</u> \$'000	<u>2015</u> \$'000
<b>CURRENT ASSETS</b>			
Cash and cash equivalents	3	189,254	136,913
Trade and other receivables	4	<u>34,066</u>	<u>14,697</u>
		<u>223,320</u>	<u>151,610</u>
<b>CURRENT LIABILITY</b>			
Trade and other payables	5	<u>306,956</u>	<u>372,082</u>
<b>NET CURRENT LIABILITY</b>		( 83,636)	(220,472)
<b>NON-CURRENT ASSET</b>			
Property, plant & equipment	6	<u>4,906</u>	<u>6,889</u>
		( <u>78,730</u> )	( <u>213,583</u> )
Financed by:			
<b>RESERVES</b>			
Surplus from Tourism Trade Development Board		19	19
Capital expenditure fund	7	4,906	6,889
Accumulated deficit		( 83,655)	(220,491)
		( <u>78,730</u> )	( <u>213,583</u> )

The financial statements on pages 3 to 22 were approved by the Board of Management on October 18, 2016 and signed on its behalf by:

  
\_\_\_\_\_  
Chairman of the Board  
John Lynch

  
\_\_\_\_\_  
Director of Tourism  
Paul Pennicook

The accompanying notes form an integral part of the financial statements.

JAMAICA TOURIST BOARD

Statement of Profit and Loss and Other Comprehensive Income  
Year ended March 31, 2016

	<u>Notes</u>	<u>2016</u> \$'000	<u>2015</u> \$'000
Government Grants:			
Ministry of Tourism		1,050,458	903,585
Caribbean Tourism Organisation (CTO)		25,631	15,339
Tourism Enhancement Fund (TEF)	9	2,426,824	2,216,880
Sports Tourism		<u>37,827</u>	<u>14,766</u>
		<u>3,540,740</u>	<u>3,150,570</u>
Less: Grants used for capital expenditure		<u>2,621</u>	<u>7,208</u>
Amount available for operational expenditure		<u>3,538,119</u>	<u>3,143,362</u>
Operational expenditure:			
United States of America		533,456	514,667
Canada		114,730	130,579
Germany		67,426	61,527
Deputy director – United Kingdom/Europe		123,633	114,409
Overseas advertising		1,520,610	1,508,254
Overseas public relations		210,869	202,588
Overseas special projects		145,344	114,141
Familiarisation tours		4,167	20,430
Marketing representatives		88,251	93,315
Membership – International Organisation		<u>27,225</u>	<u>25,582</u>
Balance carried forward		<u>2,835,711</u>	<u>2,785,492</u>

The accompanying notes form an integral part of the financial statements.

JAMAICA TOURIST BOARDStatement of Profit and Loss and Other Comprehensive Income (continued)  
Year ended March 31, 2016

	Notes	2016 \$'000	2015 \$'000
Operational expenditure:			
Balance brought forward		<u>2,835,711</u>	<u>2,785,492</u>
Local offices expenditure:			
Executive office			
- Director emoluments		19,069	22,487
- Director of Tourism Department		29,680	23,473
Destination marketing		105,403	107,777
Corporate services		227,867	211,807
Finance and administration			
- Director fees		857	802
- Auditors' remuneration		1,300	1,200
- Other		68,551	64,041
Internal audit		9,320	9,842
Sports tourism		36,424	8,956
General manager – regional offices		69,514	78,785
Cruise, marine & attractions		<u>24,953</u>	<u>22,001</u>
		<u>592,938</u>	<u>551,171</u>
<b>TOTAL EXPENDITURE</b>		<u><b>3,428,649</b></u>	<u><b>3,336,663</b></u>
Other income:			
Gain on disposal of motor vehicle		-	1,462
Interest income		580	386
Foreign exchange gain/(losses)		1,604	( 10,358)
Miscellaneous income		<u>25,182</u>	<u>31,810</u>
		<u>27,366</u>	<u>23,300</u>
Surplus/(deficit) for the year, being total comprehensive income/(loss)		<u><u>136,836</u></u>	<u><u>( 170,001)</u></u>

The accompanying notes form an integral part of the financial statements.

JAMAICA TOURIST BOARD

Statement of Changes in Reserves  
Year ended March 31, 2016

	Surplus from Tourism Trade Development <u>Board</u> \$'000	Capital expenditure fund \$'000 (note 7)	Accumulated deficit \$'000	Total \$'000
Balances at March 31, 2014	19	4,198	( 50,490)	( 46,273)
Net capital expenditure	-	2,691	-	2,691
Total deficit recognised in 2015	<u>-</u>	<u>-</u>	<u>(170,001)</u>	<u>(170,001)</u>
Balances at March 31, 2015	19	6,889	(220,491)	(213,583)
Net capital expenditure	-	(1,983)	-	( 1,983)
Total surplus recognised in 2016	<u>-</u>	<u>-</u>	<u>136,836</u>	<u>136,836</u>
Balances at March 31, 2016	<u>19</u>	<u>4,906</u>	<u>( 83,655)</u>	<u>( 78,730)</u>

The accompanying notes form an integral part of the financial statements.



JAMAICA TOURIST BOARD

Statement of Cash Flows  
Year ended March 31, 2016

	<u>2016</u> \$'000	<u>2015</u> \$'000
<b>CASH FLOW FROM OPERATING ACTIVITIES:</b>		
Surplus/(deficit) for the year	136,836	(170,001)
Adjustments to reconcile surplus/(deficit) for year to net cash (used)/provided by operating activities:		
Interest income	( 580)	( 386)
Depreciation	4,604	4,260
Foreign exchange (gains)/losses	( 1,604)	10,358
Gain on disposal of motor vehicle	<u>-</u>	<u>( 1,462)</u>
	139,256	(157,231)
Changes in:		
Trade and other receivables	( 19,369)	18,293
Trade and other payables	<u>( 65,126)</u>	<u>150,186</u>
Net cash provided by operating activities	<u>54,761</u>	<u>11,248</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Acquisition of property, plant & equipment	( 2,621)	( 7,208)
Interest received	580	386
Proceeds from sale of motor vehicle	<u>-</u>	<u>1,719</u>
Net cash used by investing activities	<u>( 2,041)</u>	<u>( 5,103)</u>
<b>CASH FLOWS FROM FINANCING ACTIVITY</b>		
Capital expenditure fund, being net cash (used)/generated by financing activity	<u>( 1,983)</u>	<u>2,691</u>
Net increase in cash and cash equivalents	50,737	8,836
Effect on foreign exchange rate changes	1,604	( 10,358)
Cash and cash equivalents at beginning of the year	<u>136,913</u>	<u>138,435</u>
Cash and cash equivalents at end of the year	<u>189,254</u>	<u>136,913</u>

The accompanying notes form an integral part of the financial statements.

## JAMAICA TOURIST BOARD

### Notes to the Financial Statements March 31, 2016

#### 1. Identification

The Jamaica Tourist Board ("the Board") is a statutory body set up to promote and develop tourism in Jamaica.

The Board's operations are mainly financed by cash grants from the Government of Jamaica. The registered office of the Board is located at 64 Knutsford Boulevard, Kingston 5.

The Board's employees aggregated 148 persons at March 31, 2016 (2015: 129).

#### 2. Statement of compliance, basis of preparation, and significant accounting policies

##### (a) Statement of compliance:

The financial statements are prepared in accordance with International Financial Reporting Standards (IFRS) and their interpretations, as adopted by the International Accounting Standards Board.

##### **New and revised standards and interpretations that became effective during the year:**

Certain new, revised and amended standards and interpretations which were in issue came into effect for the current year. The adoption of these standards and amendments did not result in any change to the presentation and disclosures in the financial statements.

##### **New, revised and amended standards and interpretations that are not yet effective:**

A number of new standards, amendments to standards and interpretations have been issued which are not yet effective at the reporting date and which the Board has not early-adopted. Management has assessed the relevance of all such new standards, amendments and interpretations with respect to the Board's operations and has determined that the following are likely to have an effect:

- IFRS 9, *Financial Instruments*, which is effective for annual reporting periods beginning on or after January 1, 2018, replaces the existing guidance in IAS 39 *Financial Instruments: Recognition and Measurement*. IFRS 9 includes revised guidance on the classification and measurement of financial assets and liabilities, including a new expected credit loss model for calculating impairment of financial assets and the new general hedge accounting requirements. It also carries forward the guidance on recognition and derecognition of financial instruments from IAS 39. Although the permissible measurement bases for financial assets – amortised cost, fair value through other comprehensive income (FVOCI) and fair value through profit or loss (FVTPL) – are similar to IAS 39, the criteria for classification into the appropriate measurement category are significantly different. IFRS 9 replaces the 'incurred loss' model in IAS 39 with an 'expected credit loss' model, which means that a loss event will no longer need to occur before an impairment allowance is recognised.

## JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2016

### 2. Statement of compliance, basis of preparation, and significant accounting policies (continued)

#### (a) Statement of compliance (continued):

##### **New, revised and amended standards and interpretations that are not yet effective (continued):**

- IFRS 15, *Revenue From Contracts With Customers*, effective for accounting periods beginning on or after January 1, 2018, replaces IAS 11, *Construction Contracts*, IAS 18, *Revenue*, IFRIC 13, *Customer Loyalty Programmes*, IFRIC 15, *Agreements for the Construction of Real Estate*, IFRIC 18, *Transfer of Assets from Customers* and SIC-31 *Revenue – Barter Transactions Involving Advertising Services*. It does not apply to insurance contracts, financial instruments or lease contracts, which fall in the scope of other IFRSs. It also does not apply if two entities in the same line of business exchange non-monetary assets to facilitate sales to other parties.

The Board will apply a five-step model to determine when to recognise revenue, and at what amount. The model specifies that revenue should be recognised when (or as) an entity transfers control of goods or services to a customer at the amount to which the entity expects to be entitled. Depending on whether certain criteria are met, revenue is recognised at a point in time, when control of goods or services is transferred to the customer; or over time, in a manner that best reflects the entity's performance.

There will be new qualitative and quantitative disclosure requirements to describe the nature, amount, timing, and uncertainty of revenue and cash flows arising from contracts with customers.

- IAS 1 *Presentation of Financial Statements*, effective for accounting periods beginning on or after January 1, 2016, has been amended to clarify or state the following:
  - specific single disclosures that are not material do not have to be presented even if they are a minimum requirement of a standard.
  - the order of notes to the financial statements is not prescribed.
  - line items on the statement of financial position and the statement of profit or loss and other comprehensive income (OCI) should be disaggregated if this provides helpful information to users. Line items can be aggregated if they are not material.
  - specific criteria is now provided for presenting subtotals on the statement of financial position and in the statement of profit or loss and OCI, with additional reconciliation requirements for the statement of profit or loss and OCI.
  - the presentation in the statement of OCI of items of OCI arising from joint ventures and associates accounted for using the equity method follows IAS 1 approach of splitting items that may, or that will never, be reclassified to profit or loss.



JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2016

2. Statement of compliance, basis of preparation, and significant accounting policies (continued)

(a) Statement of compliance (continued):

**New, revised and amended standards and interpretations that are not yet effective (continued):**

- IFRS 7, *Financial Instruments: Disclosures*, has been amended to clarify when servicing arrangements are in the scope of its disclosure requirements on continuing involvement in transferred assets in cases when they are derecognised in their entirety. A servicer is deemed to have continuing involvement if it has an interest in the future performance of the transferred asset, e.g. if the servicing fee is dependent on the amount or timing of the cash flows collected from the transferred financial asset; however, the collection and remittance of cash flows from the transferred asset to the transferee is not, in itself, sufficient to be considered 'continuing involvement'.
- Amendments to IAS 16 and IAS 38, *Clarification of Acceptable Methods of Depreciation and Amortisation*, are effective for accounting periods beginning on or after January 1, 2016.
  - The amendment to IAS 16, *Property, Plant and Equipment* explicitly state that revenue-based methods of depreciation cannot be used. This is because such methods reflect factors other than the consumption of economic benefits embodied in the assets.
  - The amendment to IAS 38, *Intangible Assets* introduce a rebuttable presumption that the use of revenue-based amortisation methods is inappropriate for intangible assets.
- Amendments to IAS 7, *Statement of Cash Flows*, effective for accounting periods beginning on or after January 1, 2017, requires an entity to provide disclosures that enable users of financial statements to evaluate changes in liabilities arising from financing activities, including both changes arising from cash flows and non-cash flows.
- IFRS 16, *Leases*, which is effective for annual reporting periods beginning on or after January 1, 2019, eliminates the current dual accounting model for lessees, which distinguishes between on-balance sheet finance leases and off-balance sheet operating leases. Instead, there is a single, on-balance sheet accounting model that is similar to current finance lease accounting. Entities will be required to bring all major leases on-balance sheet, recognising new assets and liabilities. The on-balance sheet liability will attract interest; the total lease expense will be higher in the early years of a lease even if a lease has fixed regular cash rentals. Optional lessee exemption will apply to short-term leases and for low-value items with value of US\$5,000 or less.

Lessor accounting remains similar to current practice as the lessor will continue to classify leases as finance and operating leases.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2016

2. Statement of compliance, basis of preparation, and significant accounting policies (continued)

(a) Statement of compliance (continued):

**New, revised and amended standards and interpretations that are not yet effective (continued):**

- IFRS 16, *Leases* (continued)

Early adoption is permitted if IFRS 15, *Revenue from Contracts with Customers* is also adopted.

The Board is assessing the impact, if any, that the new, revised and amended standards may have on its financial statements in future years when they become effective.

(b) Basis of preparation:

These financial statements are presented in Jamaica dollars, which is the Board's functional currency, expressed in thousands, except when otherwise stated. The financial statements are prepared on the historical cost basis except for certain financial instruments that are measured at fair values.

(c) Estimates and judgements:

The preparation of the financial statements to conform to IFRS, requires management to make estimates and assumptions that affect the reported amount of assets and liabilities, contingent assets and contingent liabilities at the reporting date and the income and expense for the year then ended. Actual amounts could differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and future periods.

Judgments made by management in the application of IFRS have no significant effect on the financial statements. The estimate with a risk of adjustment in the next financial year for the Board is the allowance for impairment losses on receivables.

In determining amounts recorded for impairment losses in the financial statements, management makes judgements regarding indicators of impairment, that is, whether there are indicators that suggest there may be a measurable decrease in the estimated future cash flows from receivables, for example, default and adverse economic conditions.



JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2016

2. Statement of compliance, basis of preparation, and significant accounting policies (continued)

(c) Estimates and judgements (continued):

Management also makes estimates of the likely estimated future cash flows from impaired receivables as well as the timing of such cash flows. Historical loss experience is applied where indicators of impairment are not observable on individual significant receivables with similar characteristics, such as credit risks.

It is reasonably possible, based on existing knowledge, that outcomes within the next financial year that are different from these assumptions could require a material adjustment to the carrying amount reflected in the financial statements.

(d) Cash and cash equivalents:

Cash and cash equivalents comprise cash and bank balances, including short-term deposits with maturities ranging between one and three months from the reporting date.

(e) Trade and other receivables:

Trade and other receivables are measured at cost less impairment losses [see note 2(j)].

(f) Trade and other payables:

Trade and other payables, including provisions, are measured at cost.

(g) Property, plant & equipment:

Items of property, plant & equipment and intangible assets are measured at cost less accumulated depreciation/amortisation and impairment losses [see note 2(j)].

(h) Depreciation:

Property, plant & equipment are depreciated on a straight-line method, at annual rates estimated to write down the assets to their expected residual values at the end of their expected useful lives. The depreciation rates are as follows:

Buildings	5%
Furniture, fixture & equipment	10% - 20%
Motor vehicles	20%

(i) Provisions:

A provision is recognised in the statement of financial position when the Board has a legal or constructive obligation as a result of a past event and it is probable that an outflow of economic benefits will be required to settle the obligation. If the effect is material, provisions are determined by discounting the expected future cash flows at a pre-tax rate that reflects current market assessments of the time value of money and, where appropriate, the risks specific to the liability.

## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2016

#### 2. Statement of compliance, basis of preparation, and significant accounting policies (continued)

##### (j) Impairment:

The carrying amounts of the Board's assets are reviewed at each reporting date to determine whether there is any indication of impairment. If any such indication exists, the asset's recoverable amount is estimated at each reporting date. An impairment loss is recognised whenever the carrying amount of an asset or its cash-generating unit exceeds its recoverable amount. Impairment losses are recognised in the Board's statement of profit or loss and other comprehensive income.

##### (i) Calculation of recoverable amount:

The recoverable amount of the Board's loans and receivables is calculated as the present value of expected future cash flows, discounted at the original effective interest rate inherent in the asset. Receivables with a short duration are not discounted.

The recoverable amount of other assets is the greater of their net fair value less cost to sell and value in use. In assessing value in use, the estimated future cash flows are discounted to their present value using a pre-tax discount rate that reflects current market assessments of the time value of money and the risks specific to the asset. For an asset that does not generate largely independent cash inflows, the recoverable amount is determined for the cash-generating unit to which the asset belongs.

##### (ii) Reversals of impairment:

An impairment loss in respect of loans and receivables is reversed if the subsequent increase in recoverable amount can be related objectively to an event occurring after the impairment loss was recognised.

In respect of other assets, an impairment loss is reversed if there has been a change in the estimates used to determine the recoverable amount.

An impairment loss is reversed only to the extent that the assets' carrying amount does not exceed the carrying amount that would have been determined, net of depreciation or amortisation, if no impairment loss had been recognised.

##### (k) Financial instruments:

A financial instrument is any contract that gives rise to both a financial asset of one enterprise and a financial liability or equity instrument of another enterprise. For the purpose of these financial statements, financial assets have been determined to include cash and cash equivalents, trade and other receivables and financial liability comprise trade and other payables.

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)  
March 31, 20162. Basis of preparation, statement of compliance and significant accounting policies (continued)

## (l) Foreign currencies:

Transactions in foreign currencies are converted at the rates of exchange ruling at the dates of those transactions. Monetary assets and liabilities denominated in foreign currencies at the reporting date are translated to Jamaica dollars at the rates of exchange ruling on that date. Gains and losses arising from fluctuations in exchange rates are recognised in the statement of profit or loss. Non-monetary assets and liabilities denominated in foreign currencies are measured at fair value and are translated to Jamaica dollars at foreign exchange rates ruling at the dates the values were determined.

For the purpose of the statement of cash flows, all foreign currency gains and losses recognised in the statement of profit or loss are treated as cash items and included in cash flows from operating or financing activities along with movements in the principal balances.

## (m) Income:

Government grants are recognised when received or deemed received.

## (n) Interest income:

Interest income is recognised in the profit or loss using effective interest method.

3. Cash and cash equivalents

	<u>2016</u> \$'000	<u>2015</u> \$'000
Cash at bank	183,658	131,595
Imprest accounts	<u>5,596</u>	<u>5,318</u>
	<u>189,254</u>	<u>136,913</u>



JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)  
March 31, 20164. Trade and other receivables

	<u>2016</u> \$'000	<u>2015</u> \$'000
Accountant General Department	17,250	-
Ministry of Tourism	1,456	1,393
Tourism Enhancement Fund	-	1,218
Tourism Product Development Company Limited	308	5,004
Jamaica Vacations Limited	40	86
Executive employee	29	-
Prepayments and deferred expenses	9,565	8,256
Staff computer loans	268	71
Others	<u>5,346</u>	<u>3,813</u>
	34,262	19,841
Less: impairment allowance	<u>( 196)</u>	<u>( 5,144)</u>
	<u>34,066</u>	<u>14,697</u>

The aging of amounts due from the Ministry of Tourism, Tourism Enhancement Fund, Executive Employee, Accountant General Department, Jamaica Vacations Limited and Tourism Product Development Company Limited at the reporting date was as follows:

	<u>2016</u>		<u>2015</u>	
	<u>Gross</u> \$'000	<u>Impairment</u> \$'000	<u>Gross</u> \$'000	<u>Impairment</u> \$'000
Not past due	17,339	-	1,301	-
Past due 31-60 days	50	-	25	-
Past due 61-90 days	77	-	-	-
Past due over 90 days	<u>1,617</u>	<u>196</u>	<u>6,375</u>	<u>5,144</u>
	<u>19,083</u>	<u>196</u>	<u>7,701</u>	<u>5,144</u>

The movement in allowance for impairment in trade receivables during the year was as follows:

	<u>2016</u> \$'000	<u>2015</u> \$'000
Balance at beginning of the year	5,144	5,144
Bad debt written off	<u>(4,948)</u>	<u>-</u>
Balance at the end of the year	<u>196</u>	<u>5,144</u>

## JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 20165. Trade and other payables

	<u>2016</u> \$'000	<u>2015</u> \$'000
Trade payables	163,199	247,082
Accrued charges	143,309	123,495
Other	<u>448</u>	<u>1,505</u>
	<u>306,956</u>	<u>372,082</u>

6. Property, plant and equipment

	<u>Freehold land and buildings</u> \$'000	<u>Furniture, fixtures and equipment</u> \$'000	<u>Motor vehicle</u> \$'000	<u>Total</u> \$'000
Cost:				
March 31, 2014	294	116,900	7,800	124,994
Additions	-	1,689	5,519	7,208
Disposal	<u>-</u>	<u>-</u>	(4,297)	( 4,297)
March 31, 2015	294	118,589	9,022	127,905
Additions	<u>-</u>	<u>2,621</u>	<u>-</u>	<u>2,621</u>
March 31, 2016	<u>294</u>	<u>121,210</u>	<u>9,022</u>	<u>130,526</u>
Depreciation:				
March 31, 2014	269	113,174	7,353	120,796
Charge for the year	-	3,334	926	4,260
Eliminated on disposal	<u>-</u>	<u>-</u>	(4,040)	( 4,040)
March 31, 2015	269	116,508	4,239	121,016
Charge for the year	<u>-</u>	<u>3,501</u>	<u>1,103</u>	<u>4,604</u>
March 31, 2016	<u>269</u>	<u>120,009</u>	<u>5,342</u>	<u>125,620</u>
Net book values:				
March 31, 2016	<u>25</u>	<u>1,201</u>	<u>3,680</u>	<u>4,906</u>
March 31, 2015	<u>25</u>	<u>2,081</u>	<u>4,783</u>	<u>6,889</u>

Freehold land and buildings include freehold land at a cost of \$25,000 (2015: \$25,000).

7. Capital expenditure fund

This represents grants received from the Ministry of Finance and the Public Service for the acquisition of property plant and equipment, net of purchases made and depreciation charges on the related assets.

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)  
March 31, 20168. Staff cost

	<u>2016</u> \$'000	<u>2015</u> \$'000
Overseas:		
United States of America	209,449	219,343
Canada	58,636	62,596
Germany	22,318	27,859
Deputy – United Kingdom, Europe and Far East	<u>48,195</u>	<u>46,138</u>
	<u>338,598</u>	<u>355,936</u>
Local:		
Executive office – Director of Tourism	36,907	34,589
Destination marketing	85,889	78,883
Corporate services	138,178	121,940
Finance and Administration	41,948	30,820
Internal audit	8,580	8,562
Cruise, Marine and Attractions	17,935	15,566
General Manager – Regional offices	50,198	44,841
Sports tourism	<u>3,821</u>	<u>-</u>
	<u>383,456</u>	<u>335,201</u>
	<u>722,054</u>	<u>691,137</u>

9. Tourism Enhancement Fund

The Jamaica Tourist Board received funding from the Tourism Enhancement Fund (TEF) in the amount of \$2,426,824,439 (2015: \$2,216,880,212). These funds were used to assist in the Board's advertising and special projects expenses and include:

	<u>2016</u> \$'000	<u>2015</u> \$'000
Advertising/marketing activities:		
Winter advertising	2,373,663	2,182,368
Tourism outlook seminar	-	11,898
Formic 2016 sponsorship	5,998	-
Island Jamaica T20 cricket tournament	-	8,000
Taste of the caribbean	3,660	4,468
Tourism awareness week	2,000	-
Youth Orchestra	-	5,632
Sumfest	-	500
IMF Delegation – “Unlocking Economic Growth”	-	3,479
Dinner for customs and immigration officers	-	535
IAF World Athletic Champion	11,737	-
Caribbean Premier League Cricket Champion	8,821	-
Tui UK Cruise Support Agreement	<u>20,945</u>	<u>-</u>
	<u>2,426,824</u>	<u>2,216,880</u>



## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2016

#### 10. Taxation

The Board is exempt from taxation on surplus arising from normal operating activities and other income.

#### 11. Pension scheme

##### Overseas pension scheme:

The Board's overseas employees participate in a money purchase pension plan administered by Equitable Life Assurance, Florida. The plan commenced March 31, 1976. The Board contributes, on an annual basis, 10.5% of employees' annual compensation.

##### Local pension scheme:

In keeping with the Pensions Act, the staff of the Board's local office may also qualify for a pension having met certain criteria. The scheme is non-contributory and falls under the authority of the Ministry of Finance and Planning.

#### 12. Related party balances and transactions

A related party is a person or entity that is related to the entity that is preparing its financial statements (referred to in IAS 24 *Related Party Disclosures* as the "reporting entity").

- (a) A person or a close member of that person's family is related to a reporting entity if that person:
  - (i) Has control or joint control over the reporting entity;
  - (ii) Has significant influence over the reporting entity; or
  - (iii) Is a member of the key management personnel of the reporting entity or of a parent of the reporting entity.
- (b) An entity is related to a reporting entity if any of the following conditions applies:
  - (i) The entity and the reporting entity are members of the same group (which means that each parent, subsidiary and fellow subsidiary is related to the others).
  - (ii) One entity is an associate or joint venture of the other entity (or an associate or joint venture of a member of a group of which the other entity is a member).
  - (iii) Both entities are joint ventures of the same third party.
  - (iv) One entity is a joint venture of a third entity and the other entity is an associate of the third entity.

# JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2016

## 12. Related party balances and transactions (continued)

- (b) An entity is related to a reporting entity if any of the following conditions applies (continued):
- (v) The entity is a post-employment benefit plan for the benefit of employees of either the reporting entity or an entity related to the reporting entity. If the reporting entity is itself such a plan, the sponsoring employers are also related to the reporting entity.
  - (vi) The entity is controlled, or jointly controlled by a person identified in (a).
  - (vii) A person identified in (a)(i) has significant influence over the entity or is a member of the key management personnel of the entity (or of a parent of the entity).
  - (viii) The entity or any member of a group of which it is a part, provides key management personnel services to the reporting entity, or the parent of the entity.

A related party transaction is a transfer of resources, services or obligations between related parties, regardless of whether a price is charged.

The statement of financial position includes balances, arising in the normal course of business, with related parties as follows:

	<u>2016</u> \$'000	<u>2015</u> \$'000
Trade and other receivables:		
Accountant General Department	17,250	-
Ministry of Tourism	1,456	1,393
Tourism Product Development Company Limited	309	5,004
Jamaican Vacation Limited	40	86
Executive employee	29	-
Tourism Enhancement Fund	<u>-</u>	<u>1,218</u>
	<u>19,084</u>	<u>7,701</u>

The statement of profit or loss and other comprehensive income includes transactions with related parties in the ordinary course of business as follows:

	<u>2016</u> \$'000	<u>2015</u> \$'000
Income:		
Ministry of Tourism (including C.T.O marketing grant)	1,076,089	918,924
Tourism Enhancement Fund (including sports tourism grant)	<u>2,464,651</u>	<u>2,231,646</u>
	<u>3,540,740</u>	<u>3,150,570</u>

## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2016

#### 13. Financial instruments

##### Financial instrument risk:

The Board has exposure to credit risk, market risk, and liquidity risk from the use of financial instruments.

Senior management has responsibility for monitoring the Board's risk management policies and periodically report to the Board of Directors on their activities.

The risk management policies are established to identify and analyse the risks faced by the Board, to set appropriate risk limits and controls, and to monitor risks and adherence to limits. Risk management policies are reviewed on a regular basis and reflect changes in market conditions and the Board's activities.

##### (i) Credit risk:

Credit risk is the risk that one party to a financial instrument will fail to discharge an obligation and cause the other party to incur a financial loss. Credit risk arises primarily from amounts due from the Ministry of Tourism and other related entities and deposits with financial institutions.

The maximum credit exposure is represented by the carrying amount of financial assets on the statement of financial position.

##### *Cash and cash equivalents:*

Cash and cash equivalents are placed with counter-parties who are believed to have minimal risk of default.

##### *Trade receivables*

The Board's exposure to credit risk is minimal as the amounts are mainly due from the Ministry of Tourism and is based on a budget, which the Government is obligated to honour.

The Board establishes an allowance for impairment that represents its estimate of incurred losses in respect of trade receivables.

##### (ii) Market rate risk:

Market risk is the risk that changes in market prices, such as foreign exchange rates and interest rates will affect the Board's income or the value of its holdings of financial instruments. The objective of market risk management is to manage and control market risk exposures within acceptable parameters, while optimizing the return on risk.

- Interest rate risk:

Interest rate risk is the risk that the value of a financial instrument will fluctuate due to changes in market interest rates.



# JAMAICA TOURIST BOARD

## Notes to the Financial Statements (Continued) March 31, 2016

### 13. Financial instruments (continued)

#### Financial instrument risk (continued):

#### (ii) Market rate risk (continued):

- Interest rate risk (continued):

At the reporting date the Board did not have interest bearing instruments hence had no exposure to interest rate risk.

- Foreign currency risk:

Foreign currency risk is the risk that the value of a financial instrument will fluctuate due to changes in foreign exchange rates.

The Board incurs foreign currency risk primarily on receivables and payables that are denominated in a currency other than the Jamaica dollar.

The principal foreign currency risks of the Board are denominated in the currencies noted in the table below. Such exposures comprise the monetary assets and liabilities of the Board that are not denominated in that currency.

The table below shows the Board's main foreign currency exposure at the reporting date.

	Net foreign currency (liabilities)/assets 2016				Net foreign currency (liabilities)/assets 2015			
	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000
Cash and cash equivalents	89	512	129	49	97	987	77	48
Accounts receivable	-	25	9	-	-	25	8	-
Accounts payable	(164)	(412)	(61)	(168)	(151)	(2,481)	(56)	(194)
	(75)	125	77	(119)	(54)	(1,469)	29	(146)

Exchange rates, in terms of Jamaica dollars, were as follows:

	<u>USD</u>	<u>EURO</u>	<u>GBP</u>	<u>CDN</u>
March 31, 2016:	121.36	138.50	172.00	92.52
March 31, 2015:	115.04	124.57	169.97	90.62

A 6% (2015: 10%) strengthening of the above currencies against the Jamaica dollar would have decreased surplus for the year by \$414,448 (2015 increase deficit by: \$18,462,722).

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2016

13. Financial instruments (continued)

Financial instrument risk (continued):

(ii) Market rate risk (continued):

• Foreign currency risk (continued):

A 1% (2015: 1%) weakening of the above currencies against the Jamaica dollar would have decreased surplus for the year by \$69,075 (2015 decrease deficit by: \$1,847,077).

This analysis assumes that all other variables, in particular interest rates remains constant.

(iii) Liquidity risk:

Liquidity risk, also referred to as funding risk, is the risk that the Board will encounter difficulty in raising funds to meet commitments associated with financial instruments. Liquidity risk may result from an inability to sell a financial asset quickly at, or close to, its fair value.

Financial liabilities comprise trade and other payables that are repayable within twelve months at the carrying amounts reflected on the statement of financial position. There was no change in the way the Board manages liquidity risk.

15. Fair value of financial instruments

Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Where quoted market prices are not available, the fair values of these instruments have been determined using a generally accepted alternative method.

The following methods and assumptions were used to estimate the fair value of each class of financial instrument for which it is practicable to estimate that value.

Financial instrument

Method

Cash and cash equivalents, accounts receivable, and accounts payable.

Assumed to approximate their carrying values, due to their short-term nature.

## **APPENDIX III**

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JAMAICA TOURIST BOARD SENIOR EXECUTIVES COMPENSATION									
LOCAL OFFICES									
POSITION OF SENIOR EXECUTIVE	YEAR	SALARY	GRATUITY/ PERFORMANCE INCENTIVE	TRAVELLING/ VALUE OF ASSIGNED CAR	PENSION	OTHER ALLOWANCES	NON-CASH BENEFITS	TOTAL	
		\$	\$	\$	\$	\$	\$	\$	\$
Director of Tourism (Contract)	2015/16	15,375,360.00	Gratuity	3,680,550.29	No		2,335,600.00	17,710,960.00	
D/Director -1 Marketing (Contract)	2015/16	3,228,571.40	Grat./Perf. Incentive	683,341.51	No	1,011,333.33		4,239,904.73	
D/Director -2 Marketing (Contract)	2015/16	781,083.33	Grat./Perf. Incentive	175,151.51	No	288,541.66		1,069,624.99	
D/Director - Cruise, Events & Attractions	2015/16	5,598,775.36	Perform. Incentive	1,219,656.00	Yes	839,574.68		6,438,350.04	
Head, Corporate Services (Contract)	2015/16	5,860,969.86	Grat./Perf. Incentive	1,219,656.00	No	25,000.00		5,885,969.86	
Chief Financial Officer 1 (Contract)	2015/16	2,135,096.65	Grat./Perf. Incentive	508,190.00	No	25,000.00		2,160,096.65	
Chief Financial Officer 2 (Contract)	2015/16	2,954,676.90	Grat./Perf. Incentive	975,726.00	No	328,251.19		3,282,928.09	
Regional Director - Jamaica (Contract)	2015/16	4,983,675.96	Grat./Perf. Incentive	1,219,656.00	No	6,150.78		4,989,826.74	
Regional Director - 2 Jamaica (Contract)	2015/16			16,666.64				16,666.64	
Senior, Manager Information Systems	2015/16	5,474,156.68	Grat./Perf. Incentive	1,219,656.00	No	25,000.00		5,499,156.68	
OVERSEAS OFFICES									
		US\$		US\$		US\$		US\$	
POSITION OF SENIOR EXECUTIVE									
Deputy Director-USA	2015/16	81,756	Performance Incentive	9,444	Yes	64,852	47,468	203,520.00	
Regional Director Tour Operator & Airlines	2015/16	73,321	Grat./Perf. Incentive	9,444	Yes	33,660	42,335	158,760.00	
Regional Director Groups & Convention	2015/16	77,862	Performance Incentive	9,444	Yes	59,070	42,618	188,954.00	
	Can\$	Can\$		Can\$		Can\$	Can\$	Can\$	
Regional Director-Canada	2015/16	100,531	Performance Incentive	13,212	Yes	82,698	26,134	222,575.00	
		£		£		£	£	£	
Regional Director-UK	2015/16	46,903	Performance Incentive	5,688	Yes	35,584	19,753	107,928.00	
		€		€		€	€	€	
Regional Director-Europe	2015/16	58,909.00	Performance Incentive	8,760	Yes	39,471	9,869	117,009.00	

**JAMAICA TOURIST BOARD**  
**BOARD OF DIRECTORS COMPENSATION 2015-2016**

	Position of Director	Fees	Travelling/Mileage	Honararia	Other Compensation	TOTAL
		\$	\$	\$	\$	
Dennis Morrison	Chairman	137,500.00				137,500.00
Gordon Brown	Member	92,000.00	272,976.00			364,976.00
Evelyn Smith	Member	78,500.00	23,124.00			101,624.00
Wayne Cummings	Member	74,500.00				74,500.00
Carolyn Wright	Member	99,500.00	152,844.00			252,344.00
Mark Melville	Member	75,000.00				75,000.00
Zein Issa Nakash	Member	138,000.00				138,000.00
Noel Soley Jr	Member	82,000.00				82,000.00
Nicola Madden Greig	Member	80,500.00				80,500.00

**Points to Note:**

1. Mr. Kevin Hendrickson opted not to take Director's Fees.
2. Mr. Paul Pennicook, as Director of Tourism, was not eligible to receive Director's Fees.