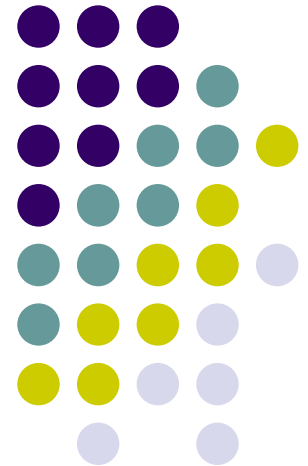


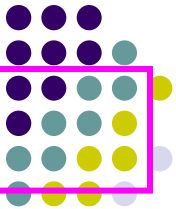
# Visitor Opinion Survey

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September – December 2006



# Background



- One of the main objectives of any tourist destination is ensuring that the visitors' experience is an enjoyable one. This is critical for the future of any tourism industry. It is a fact that satisfied visitors are more likely to recommend the destination to others, thus being a very powerful marketing tool. In light of this fact the Jamaica Tourist Board conducts twice yearly a Visitor Opinion/ Visitor Satisfaction Survey. The research identifies those aspects of the visitors' experience that are most important in achieving satisfaction.
- This report details information collected from visitors who departed from the island between September 18 to December 28, 2006. The survey covered the satisfaction level of visitors and provided details of:
  - The activities they participated in,
  - The likelihood to recommend or revisit ,
  - Their trip planning process
  - Visitor profile including purpose of trip, income level and their visitor characteristics.
- **Jamaica Tourist Board** has been conducting Visitor Opinion Surveys since 1978 . This document contains tables and graphs for September to December 2006 juxtaposed against previous data from December 2005- March 2006 and 2001 surveys. The questionnaire used for this survey is the same as that of the 2005/2006 survey. A copy of the survey instrument is reproduced in Appendix I .

## Objectives

The objectives of the survey are :

- To determine the level of visitor satisfaction with respect to tourist attractions, facilities and services.
- To determine how visitors rate Jamaica in comparison with other destinations.
- To ascertain the importance of various factors in influencing their decision to vacation in Jamaica.

# Background cont'd

- To ascertain their impression of Jamaica before and after the trip.
- To garner their interest in various activities.
- To rate the quality and services at the accommodation at which they stayed.
- To determine if they were harassed, where they were harassed and the type of harassment.

## Methodology

- Face –to-face interviews were done with departing passengers at the Norman Manley International Airport and MBJ Airport.
- A total of 3,000 interviews were conducted.

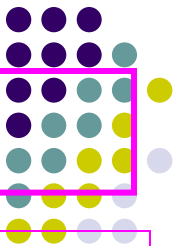
## Timing

- Interviews were conducted September 18 - December 28, 2006

# Summary of findings

- A high percentage (59%) of visitors interviewed for the survey were first time visitors. 41% on the other hand were repeat visitors.
- One out of every seven repeat visitors had come before on a cruise ship.
- 41% of the repeat visitors stated that their last trip to Jamaica was less than a year ago.
- 33% of the repeat visitors have made at least 2 trips to Jamaica in the past 3 years.
- When asked to state the destination they had visited in the past 3 years, close to 50% indicated that they had not traveled in the past 3 years.
- Those who visited other destinations were asked to state whether Jamaica was a superior destination; the other destination superior or about the same. Jamaica was considered superior to Antigua (62%) and the Dominican Republic (58%) by a high number of the respondents.
- The majority (51%) of the respondents used a travel agent to make their reservation. The next highest number (38%) indicated that they used the Internet.

# Summary of findings

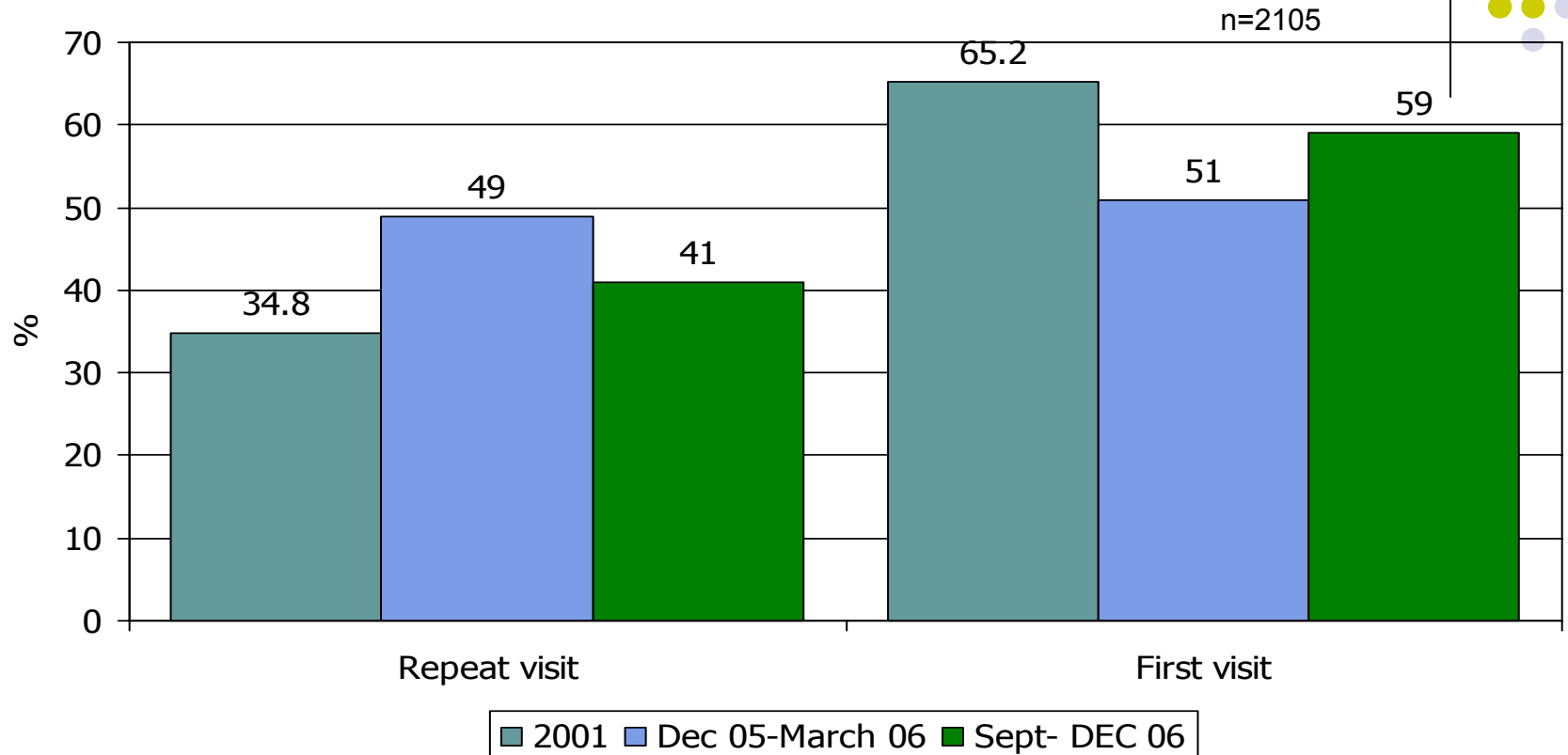


- The majority (52%) of the visitors were in Jamaica for a vacation. The next highest number were here on business (25%). There was a decrease in the percentage of persons coming to Jamaica for a vacation and an increase in the percentage coming for business.
- The top factor that influenced the persons interviewed to take a vacation in Jamaica was friends/ relatives (36%).
- The majority of the visitors were interested in going to beaches (78%), close to 50% were interested in dining out. 41 % on the other hand were not very interested in guided tours.
- A high number of the visitors stated that their main reasons for visiting Jamaica were culture (19%), relaxation (18%) and good value for money (15%).
- Montego Bay was visited by the highest number of the respondents.
- Hotels were the accommodation utilized by the majority (87%) of the respondents.
- 1 out of every 2 persons interviewed visited an attraction while on vacation in Jamaica from September - December 2006.

# Summary of findings

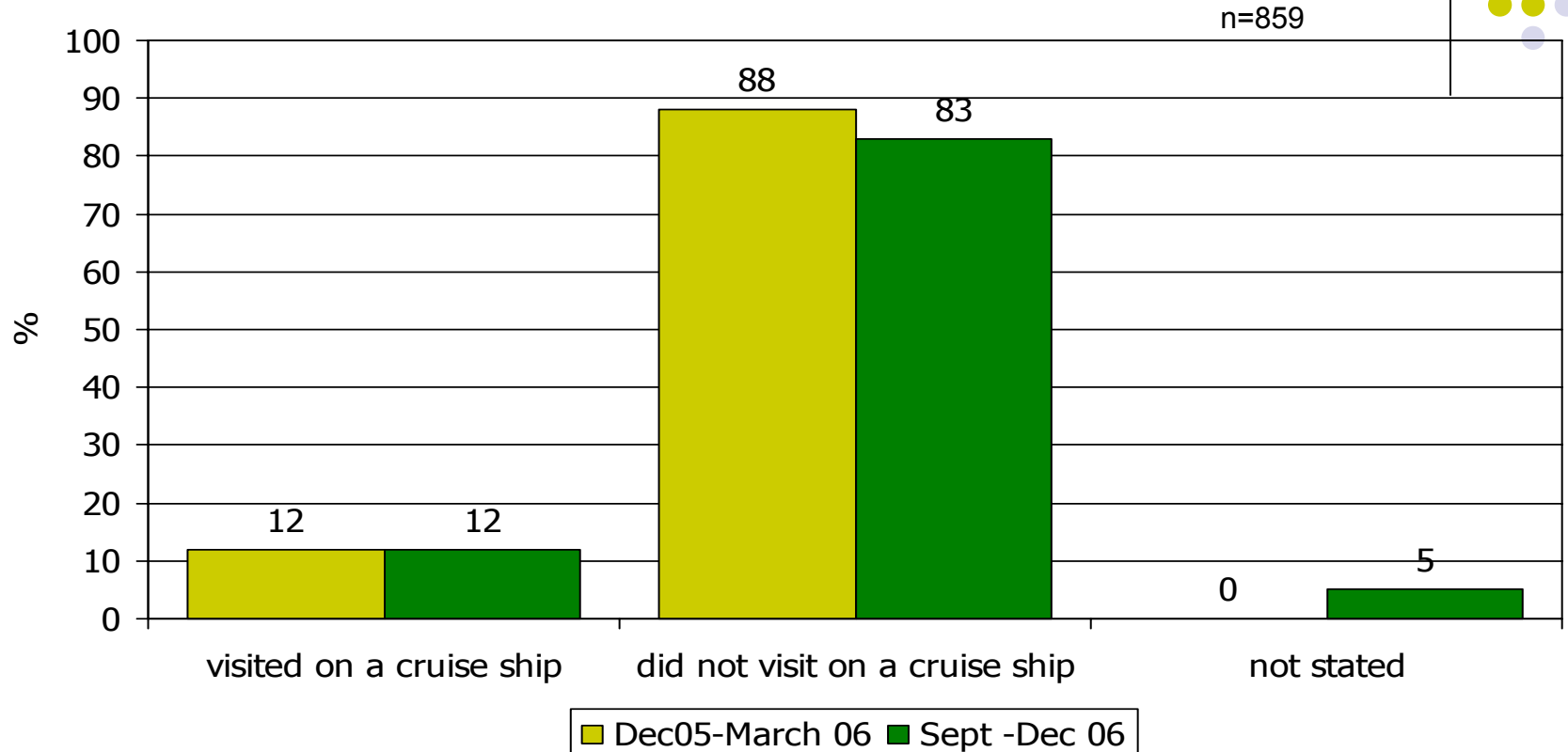
- 35% of the respondents were harassed during their visit.
- A high percentage (55%) of the visitors were harassed in shopping areas.
- The majority (84%) of the those who were harassed stated that they were pressured to buy things.
- A high percentage (31%) of the respondents thought that their visit to Jamaica was far better than expected.
- The majority (71%) of the respondents stated that they would recommend Jamaica to family and friends.
- 80% of the visitors interviewed from Sept- Dec 06 were from the U.S.
- Jamaica was the first choice for vacation for the majority (80%) of the visitors.

# Is this your first visit to Jamaica?



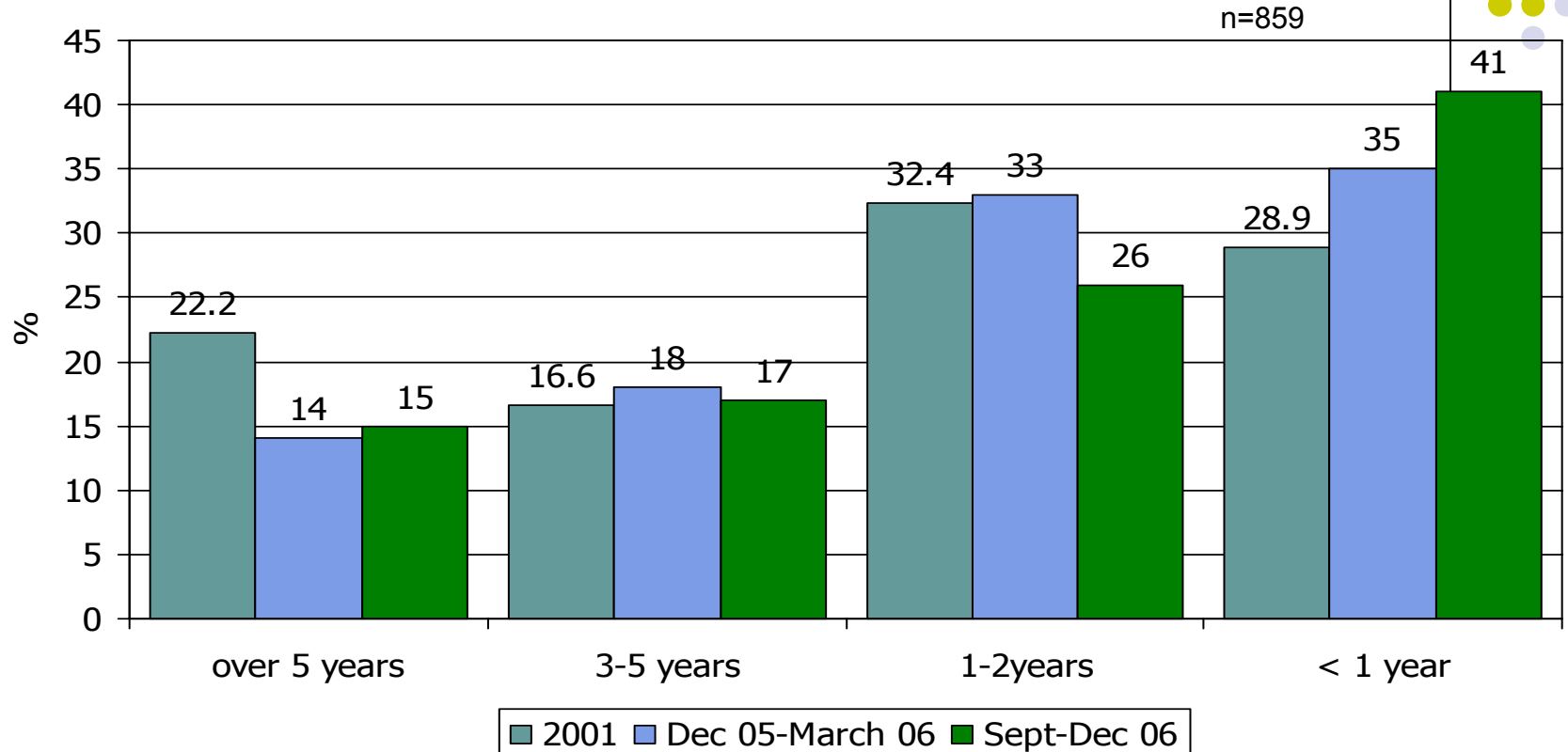
The majority (59%) of the visitors interviewed from September to December 2006 were first time visitors to Jamaica. 41% were repeat visitors.

# Was previous visit to Jamaica on a cruise?



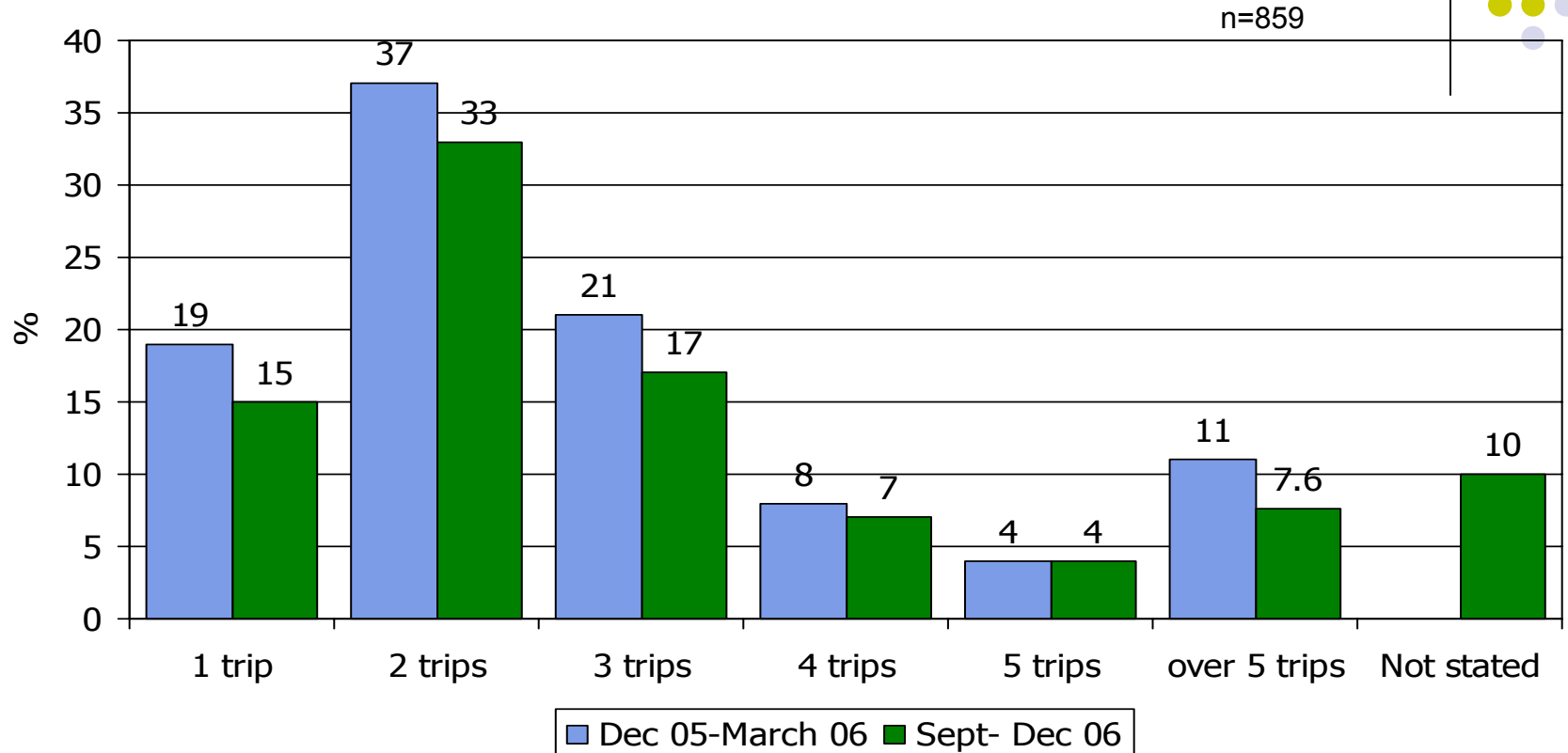
The repeat visitors were asked if their previous visit was on a cruise ship. The majority (83%) stated that their previous visit was not via a cruise ship. A small percentage (12%) on the other hand stated that this was so. It can be concluded therefore that one out of every seven repeat visitors interviewed visited before on a cruise ship.

# Last trip to Jamaica



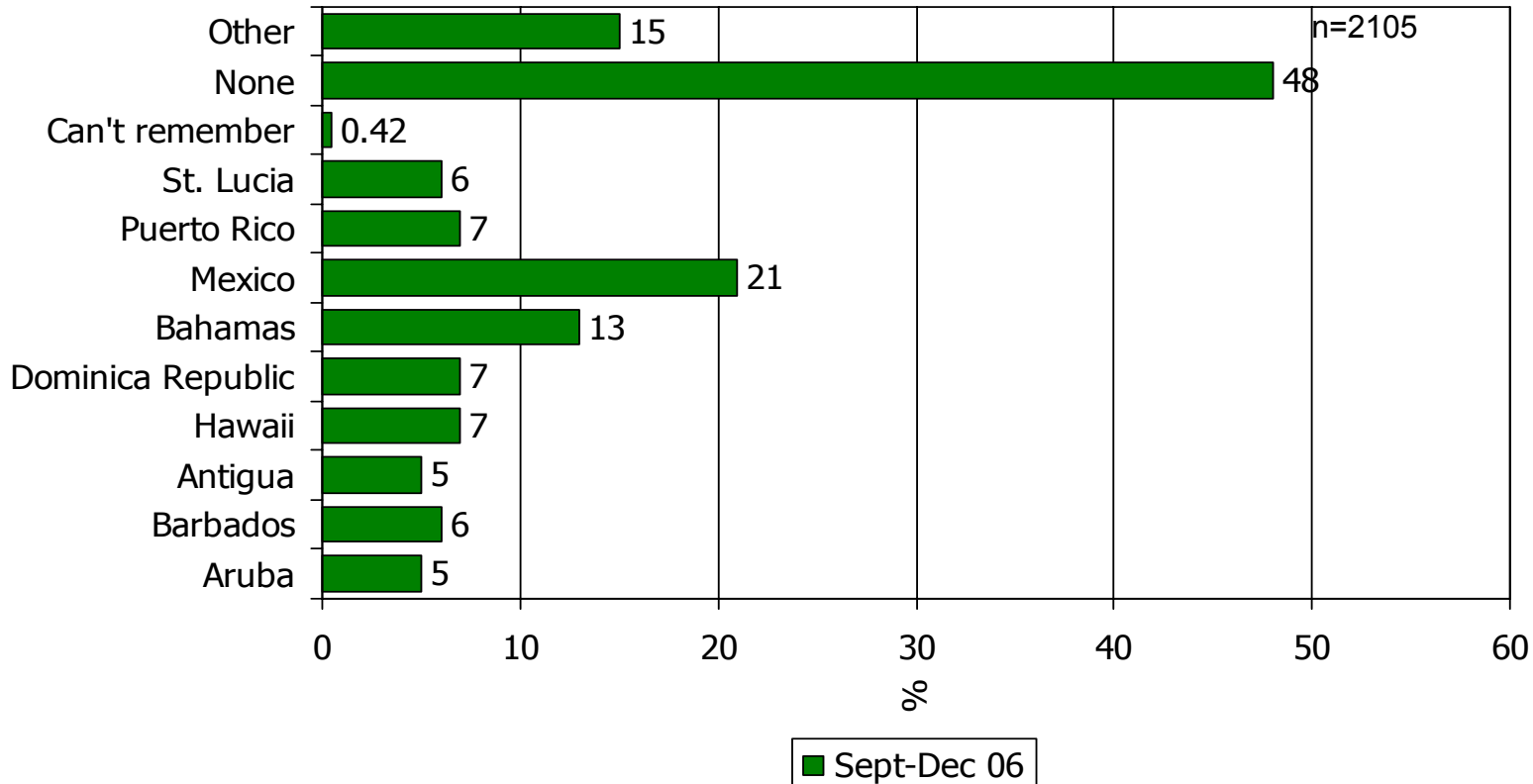
A high number (41%) of the repeat visitors stated that their last trip to Jamaica was less than 1 year ago.

# Number of visits in the last 3 years



The highest number (33%) of the repeat visitors have made two trips to Jamaica in the past 3 years.

## Destination visited in the past 3 years



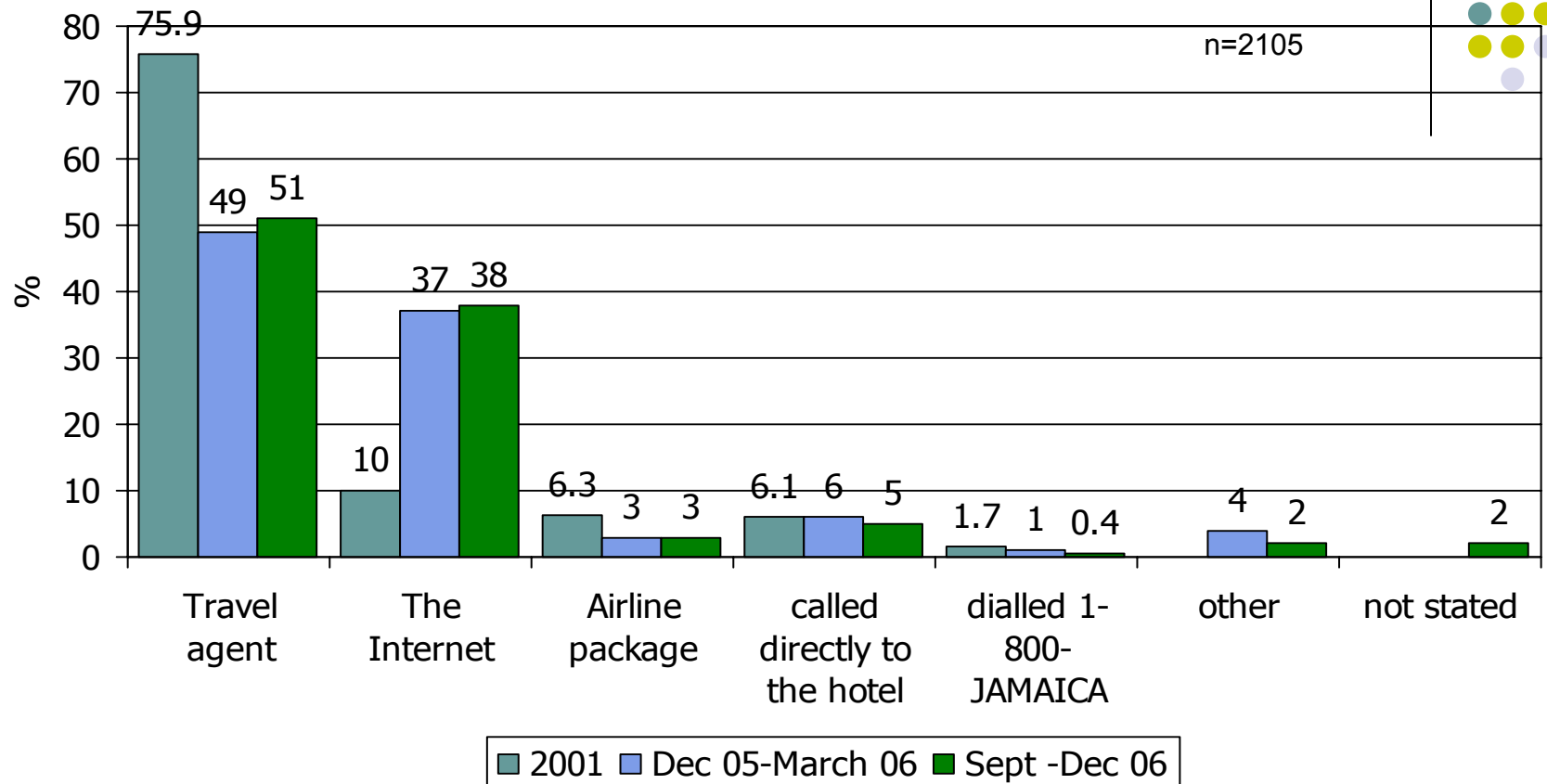
All the persons interviewed were asked to state the destination they visited in the past 3 years. Mexico was visited by the highest number (21%) of the visitors interviewed. Bahamas (13%) was visited by the next highest number of the visitors. Close to 50% of the visitors stated that they had not visited any destination in the past 3 years.



## How do you rate this trip to Jamaica with your trip to any of these destinations visited within the last 3 years?

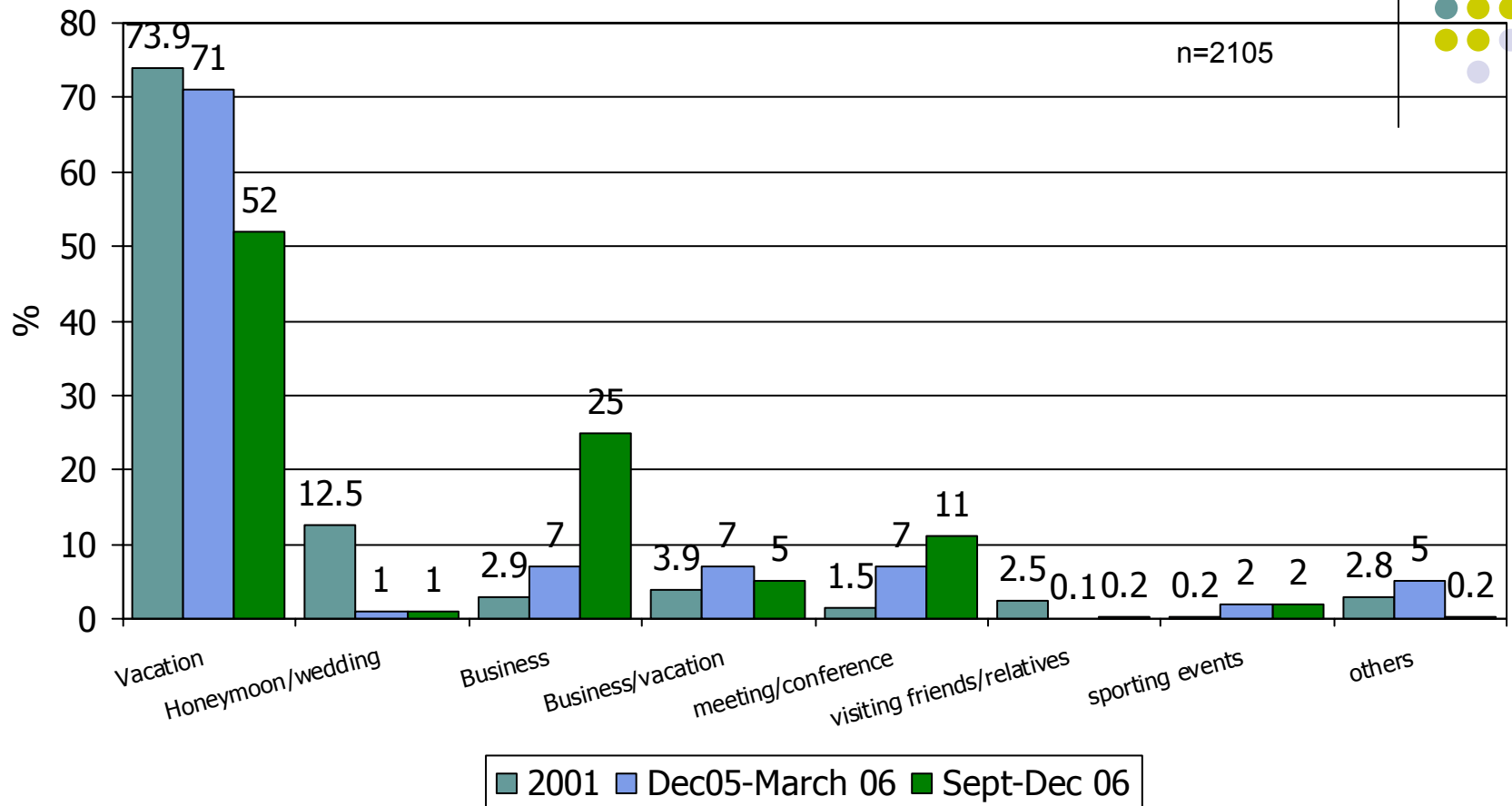
Country	Jamaica Superior	Other Superior	About the same
	%	%	%
Aruba	37	37	27
Bahamas	44	22	35
Barbados	40	35	25
Mexico	48	21	32
Antigua	62	18	20
Puerto Rico	48	21	31
Hawaii	21	49	30
St. Lucia	40	27	33
Dominican Republic	58	13	29
Other	44	27	29

# What method did you use to make your reservation?



The majority (51%) of the visitors indicated that a travel agent was used to make their reservation. There continues to be an increase in the use of the Internet to make reservation. For September to December 2006 38% of the respondents stated that they used the Internet to make reservations.

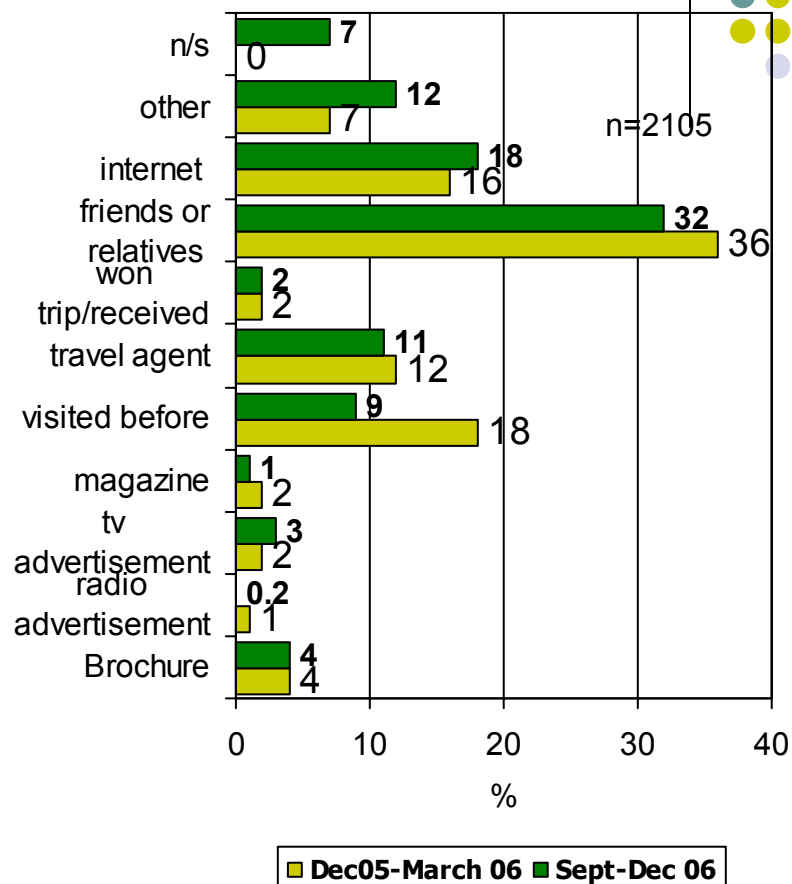
# What was the main purpose of your visit?



The majority (52%) of the respondents visited mainly for vacation from September to December 2006. This is a 19% decrease when compared to December 2005- March 2006. On the other hand there was a significant increase in the number of persons who were visiting for business.

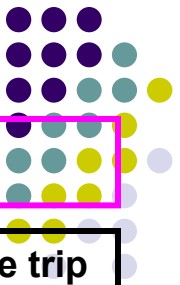
## The importance of each method in influencing decision to vacation in Jamaica & most important factor

Factors	V. imp	F. import	Not so import	Not at all import
	%	%	%	%
Brochure	19	20	18	43
Radio	2	5	23	70
TV	8	16	21	55
Magazine or news paper	7	17	20	55
Visited before	32	9	10	50
Travel agent	28	17	11	43
Won trip/ gift	6	5	11	79
Friends or relatives	46	17	8	29
Internet	41	20	8	31
other	51	1	4	25



• Friends or relatives were the most important factor that influenced a large number (36%) of the respondents to take a vacation in Jamaica. When asked to state the importance of this factor 46% indicated that it was very important, 17% fairly important, 8% not so important and 29% not at all important. A high number of the visitors indicated that radio (70%) TV (55%), magazine/newspaper (55%) and won trip/gift (79%) were not at all important in their decision to visit Jamaica.

# Impression of Jamaica before and after visit



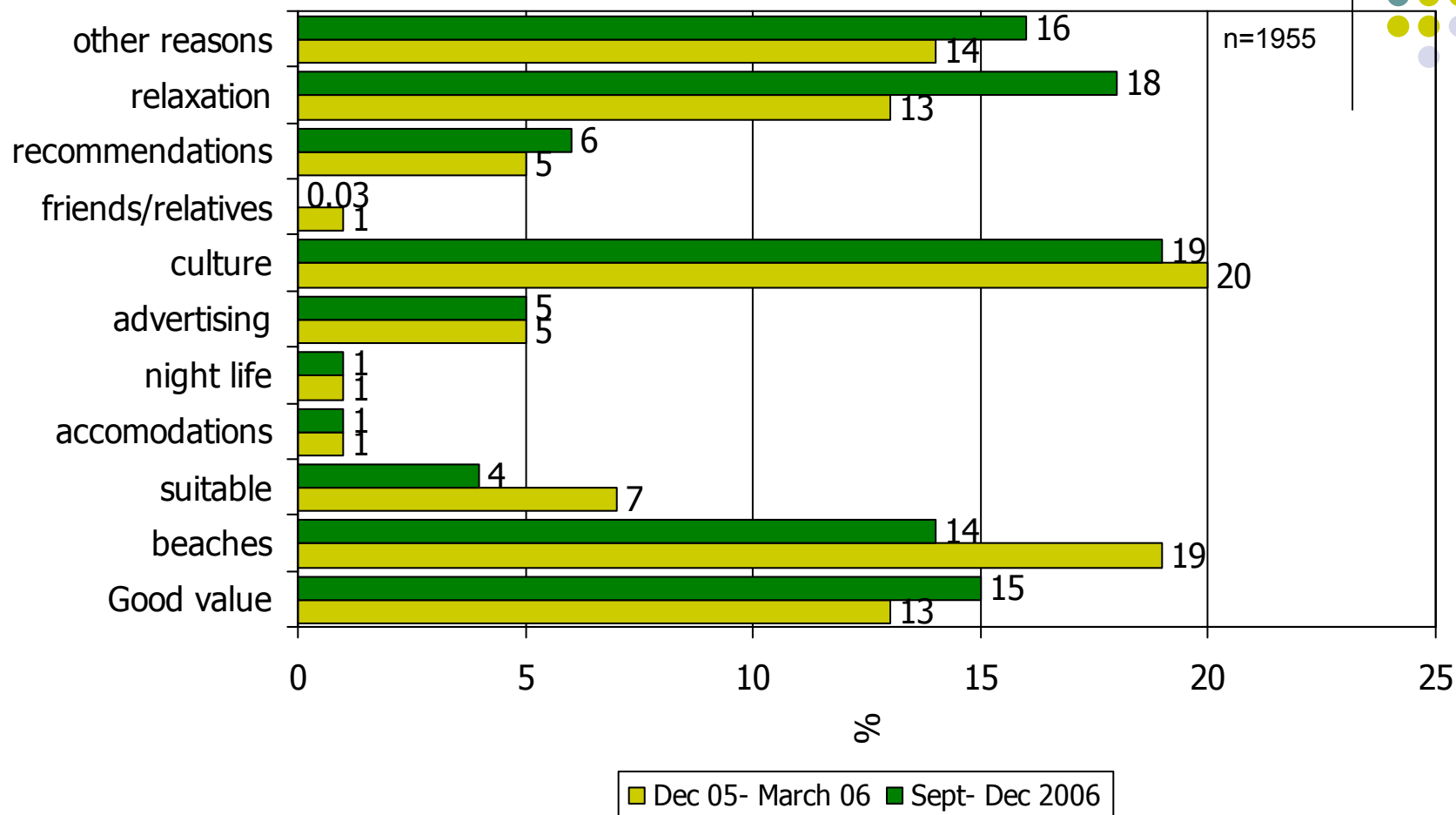
Characteristics	Impression before the trip	Impressions after the trip
	Average	Average
Scenery	7	8
Attitude of people	7	8
Beaches	8	9
Music	8	8
Safe place to visit	6	7
Accommodation facilities	7	8
Attractions	7	8
Culture	8	8
Entertainment	7	8
Water sport activities	7	8

# How interesting were the following

Statements	Very interested	Somewhat interested	Not very interested
	%	%	%
How interested were you in visiting nature areas	39	31	29
How interested were you in guided tours	28	32	41
How interested were you in shopping	29	36	35
How interested were you in dining out	48	31	21
How interested were you in the beaches	78	14	8
How interested were you in water sports	43	29	28
How interested were you in nightlife activities	33	35	32
How interested were you in other activities	52	9	38

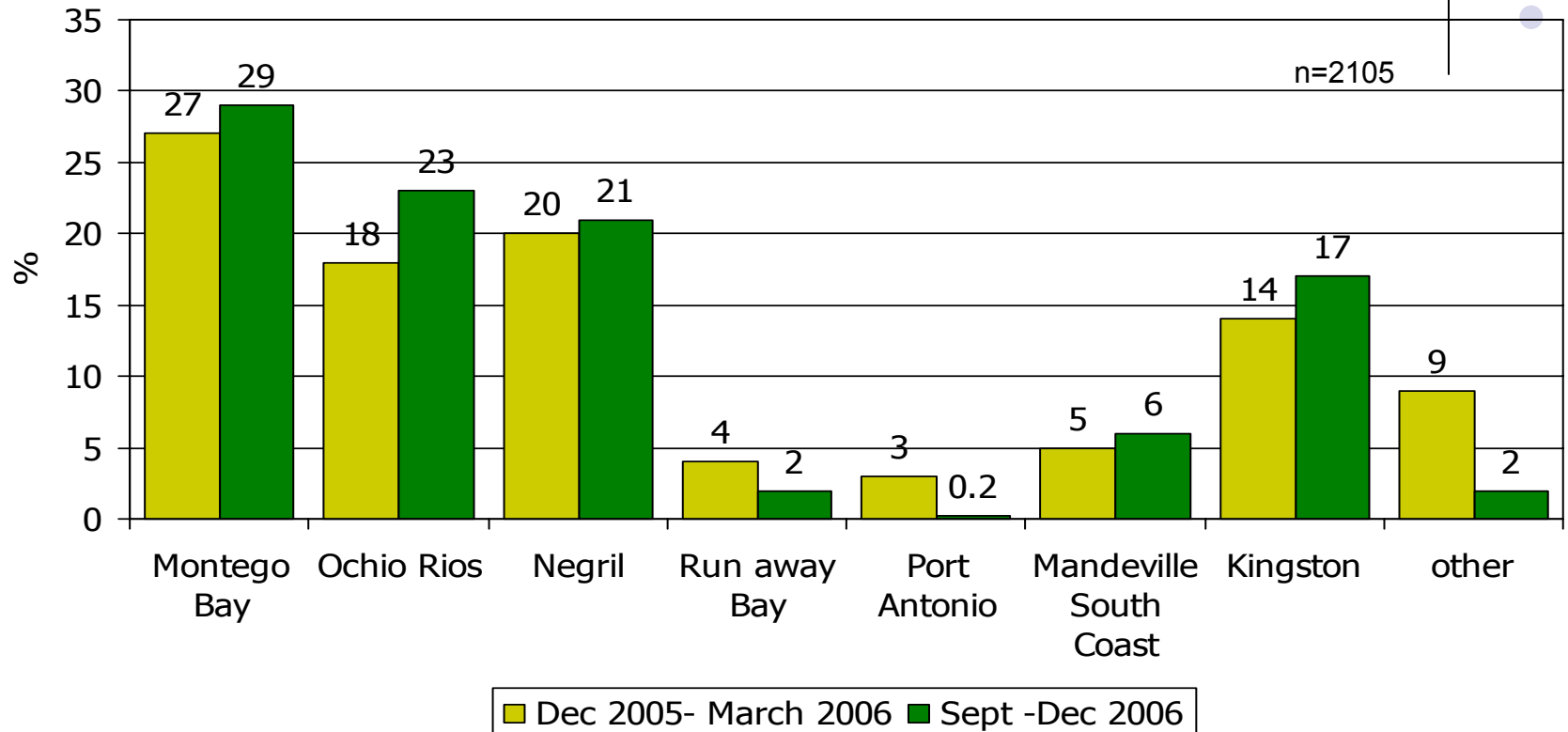
- The majority (78%) of the visitors stated that they were very interested in visiting beaches. Close to 50% of those interviewed stated that they were interested in dining out (48%) and water sports (43%). 41% on the other hand were not very interested in guided tours.

# Main reason for choosing Jamaica



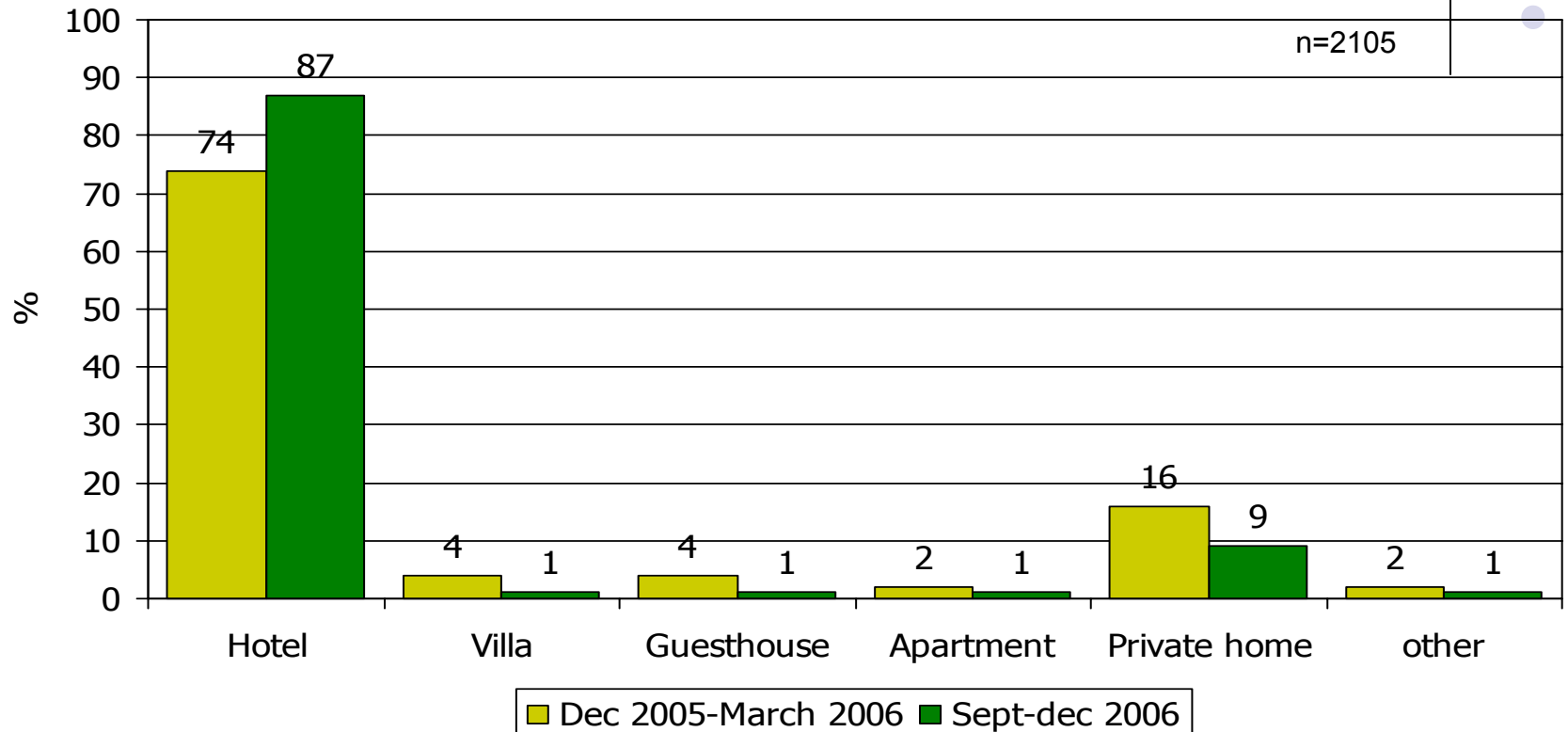
The visitors stated numerous reasons for visiting Jamaica. Culture (19%) was the reason given by the highest number of the respondents.

# Areas visited



Montego Bay (29%) was visited by the highest number of the visitors.

## Type of accommodation used



The majority (87%) of the visitors stayed in a hotel while in Jamaica.

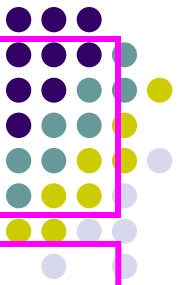


## Rating of the following...

Attributes	Rating			
	Excellent	Good	Fair	poor
Rating of room quality	47	39	11	3
Rating of quality of food and beverage	47	36	13	3
Rating of quality of service	60	30	8	2
Rating of quality of activities	49	37	12	3

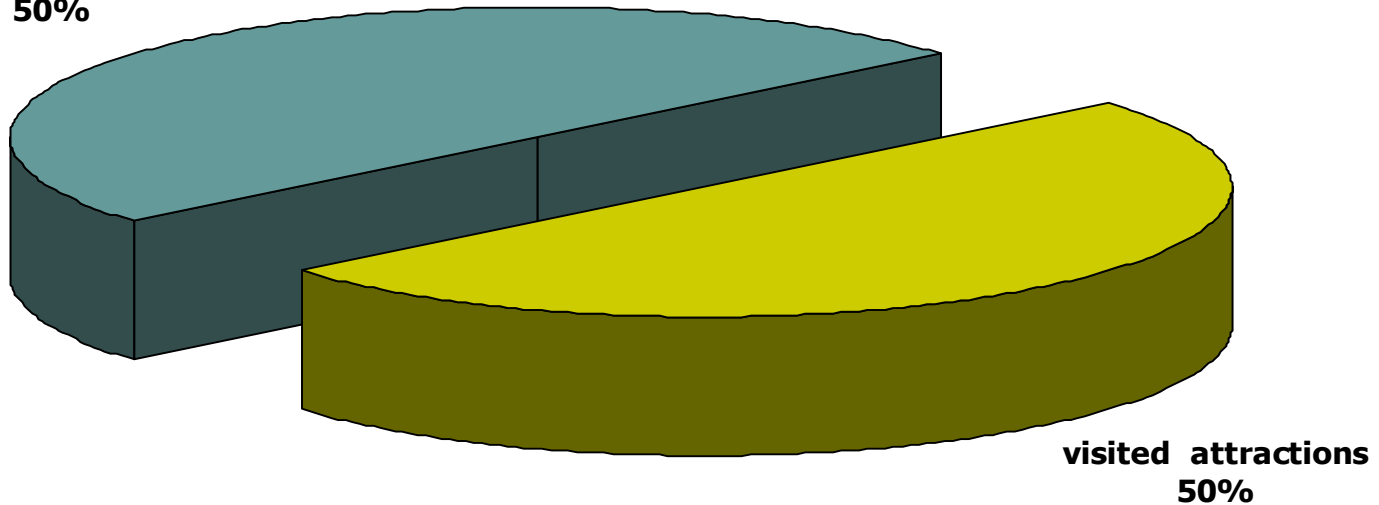
- Room quality was given an excellent rating by 47% of the visitors.
- The quality of food and beverage was given an excellent rating by 47% of the visitors.
- The quality of service was given an excellent rating by the majority (60%) of the visitors.
- The quality of activities was given an excellent rating by 49% of the respondents .

# During your vacation did you visit any of our attractions?



did not visit any attractions  
50%

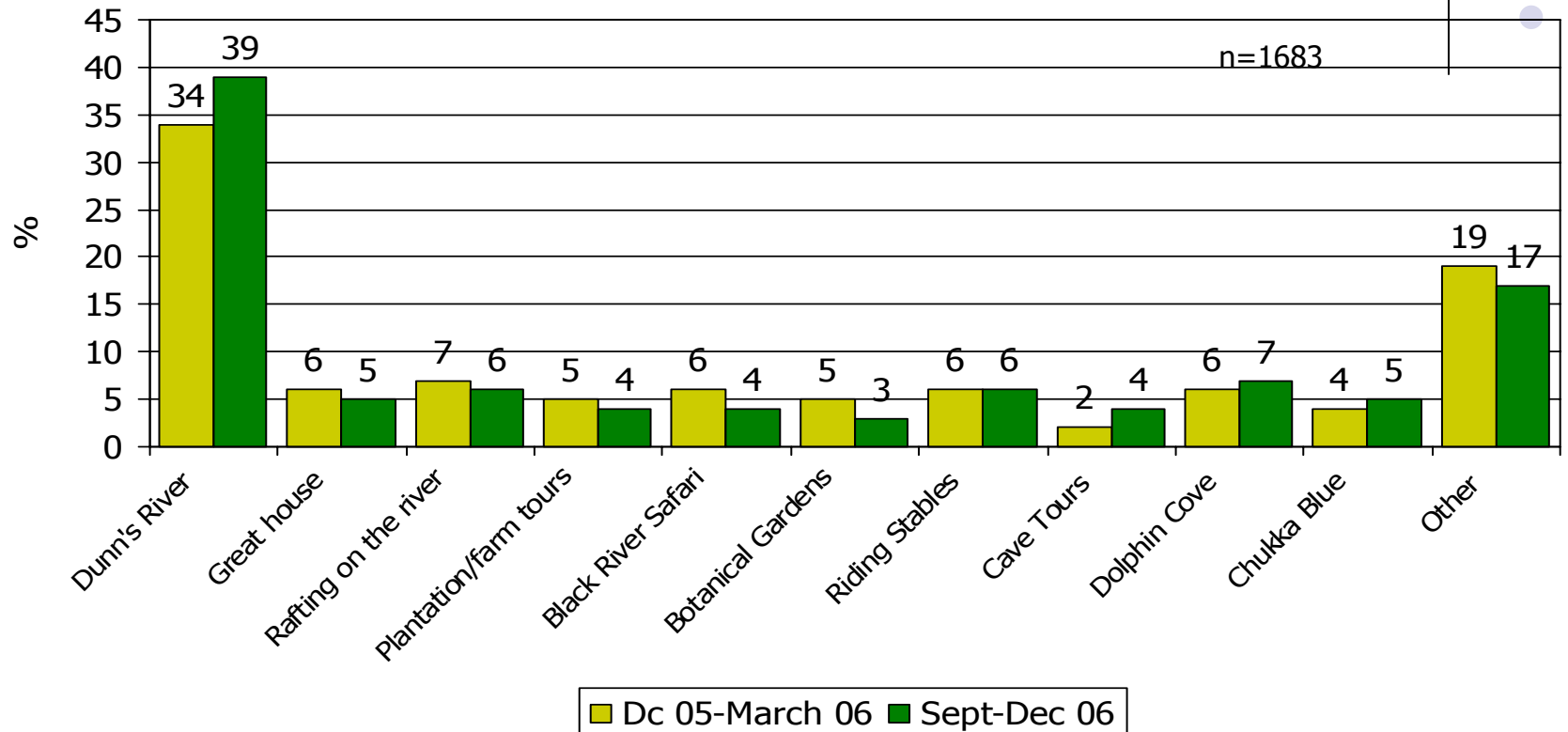
n=1957



■ visited attractions ■ did not visit any attractions

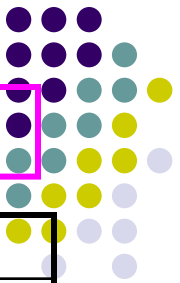
- One out of every two visitors who were interviewed from September to December 2006 visited an attraction while in Jamaica.

# Incidence of visiting the following attractions



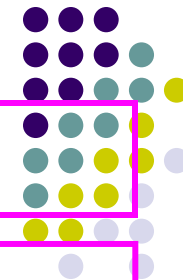
Dunn's River Falls was the attraction visited by the highest number of visitors who were interviewed September – December 2006.

## Rating of attractions with regards to their facilities and services

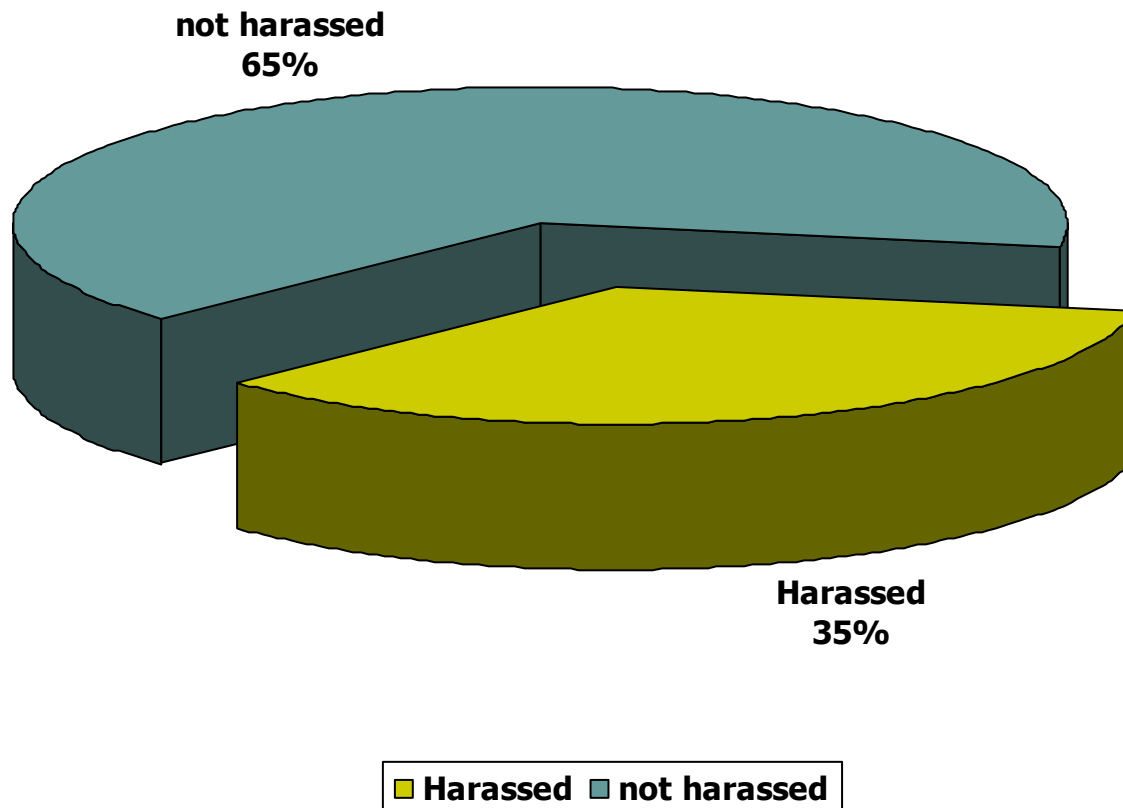


Attraction	Rating				
	Excellent	Good	Fair	poor	Needs improvement
	%	%	%	%	%
Dunn's River	78	18	2	1	1
Great House Tours	68	25	6	0	1
Rafting on the River	62	25	9	1	4
Plantation Tours	53	36	6	3	3
Rafting on Black River Safari	60	30	7	0	3
Botanical Gardens	77	17	6	0	0
Riding Stables	67	28	4	0	2
Cave Tours	50	34	16	0	0
Dolphin Cove	77	18	3	1	1
Chukka Blue	68	23	8	1	0
Other places	60	23	9	4	4

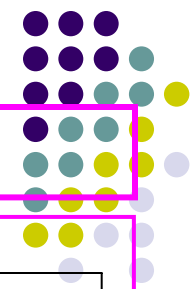
## Harassed during stay



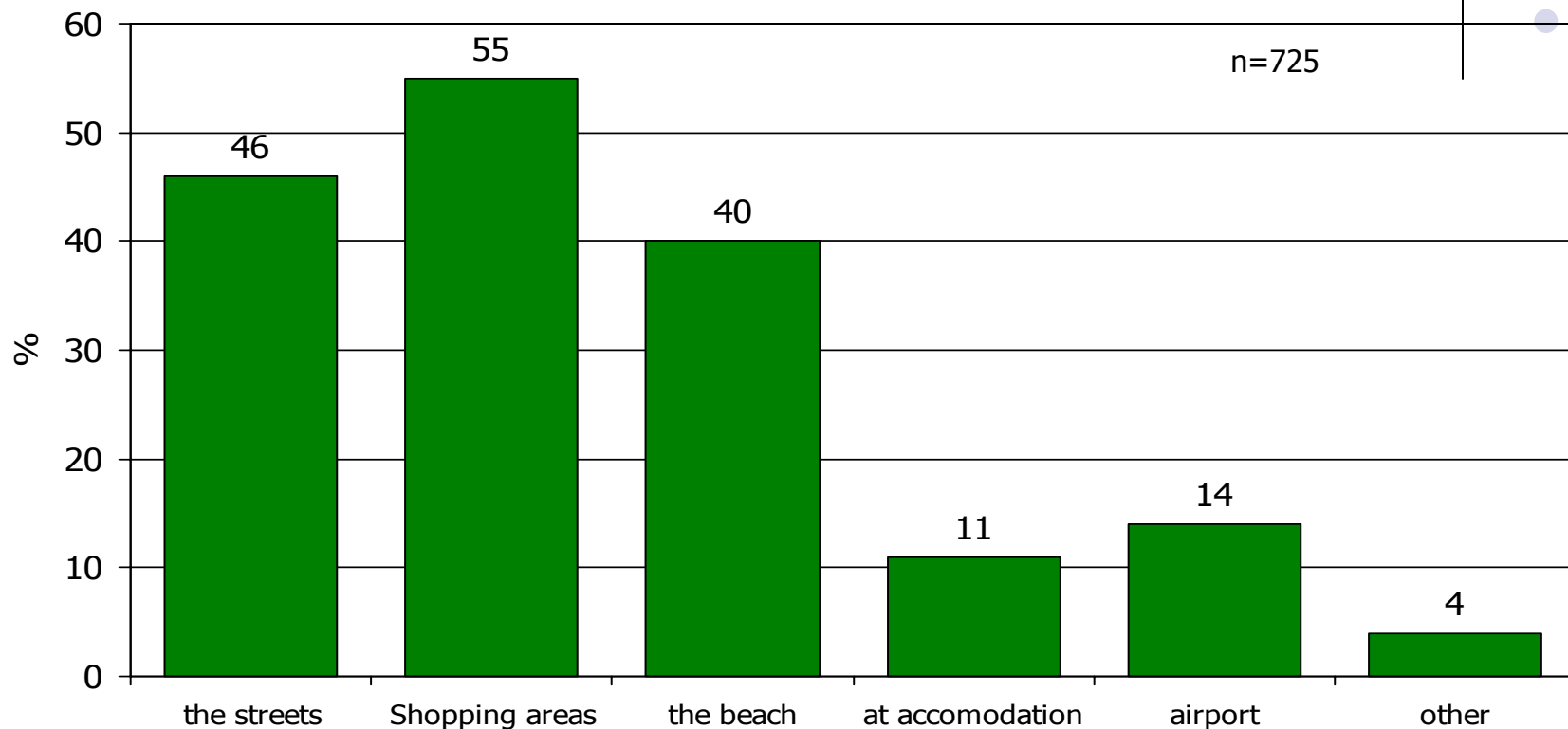
n=2079



The majority (65%) of the visitors stated that they were not harassed when they visited Jamaica.

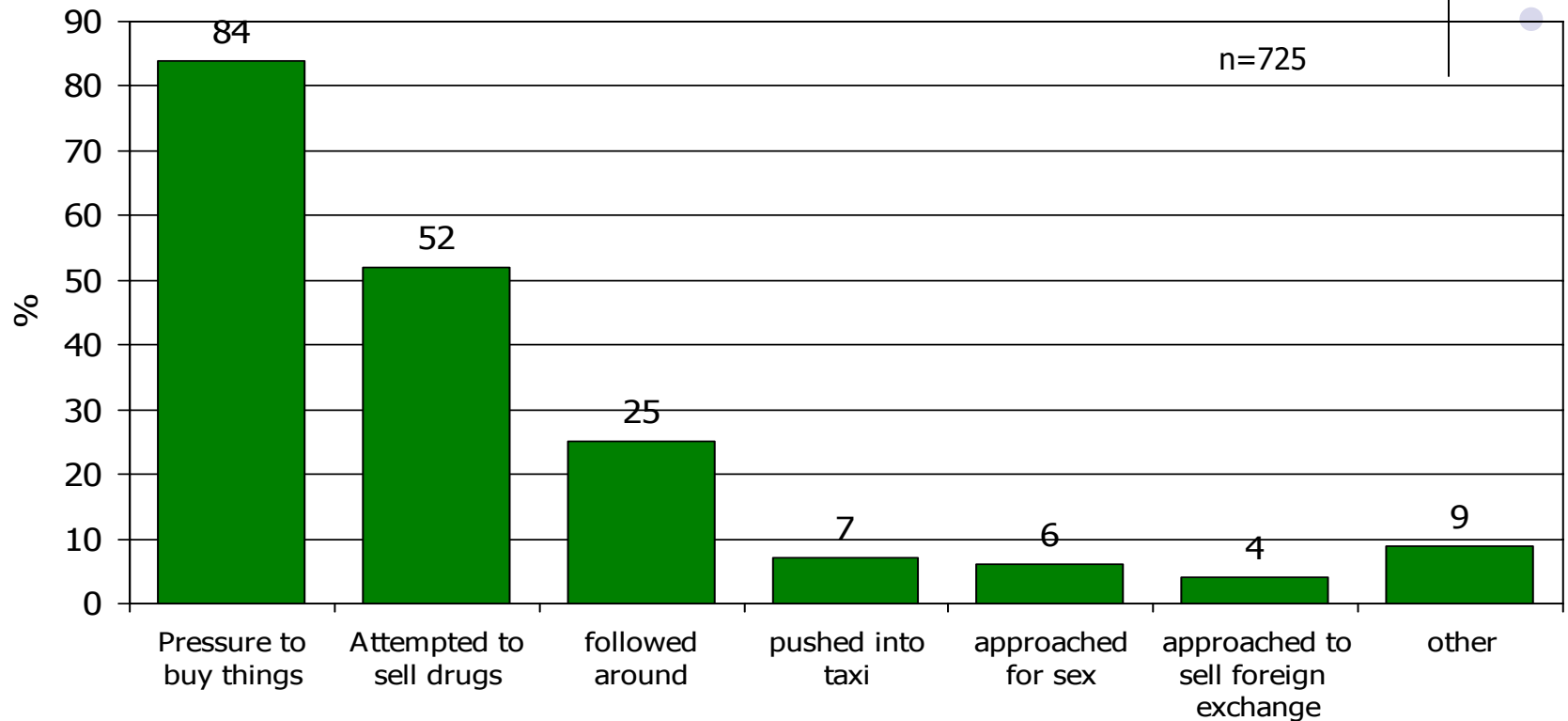


## Places where harassment took place



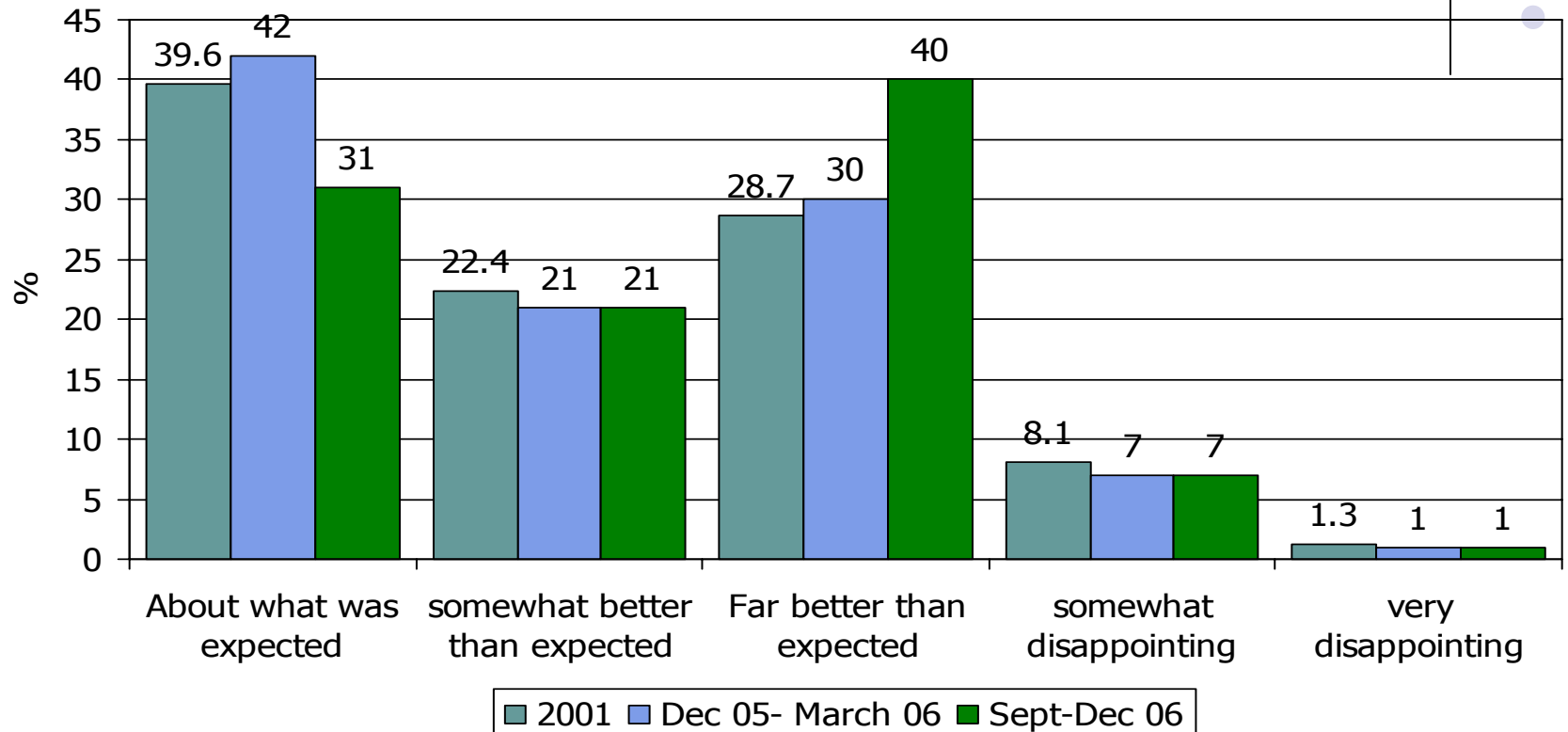
Some of the visitors were harassed on more than one occasion. A significant number were harassed on the streets (46%) and shopping areas (55%).

# Types of harassment



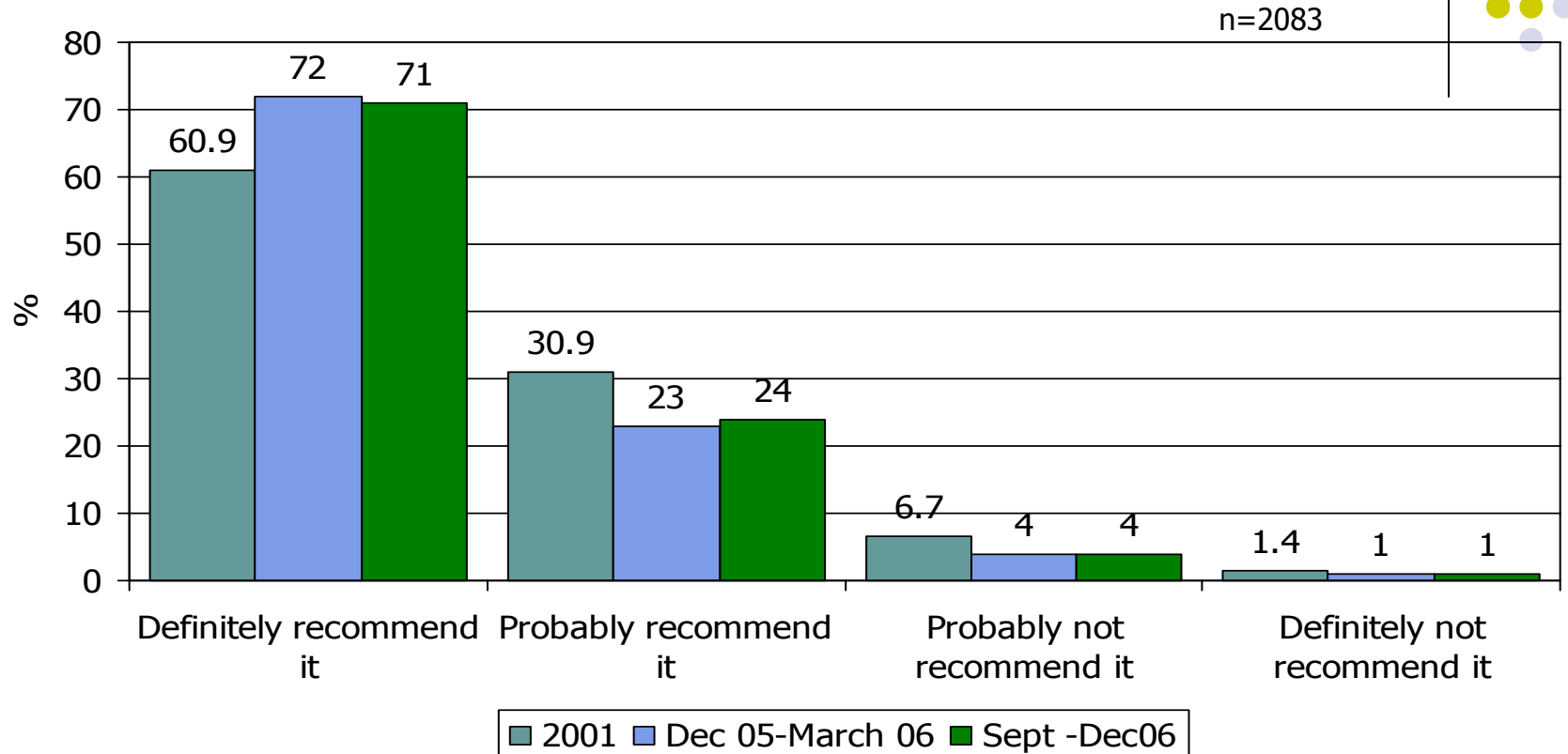
The majority (84%) of the persons who were harassed stated that they were pressured to buy things. Attempts were made to sell 52% of the visitors interviewed drugs.

## How was your visit compared with your expectations?



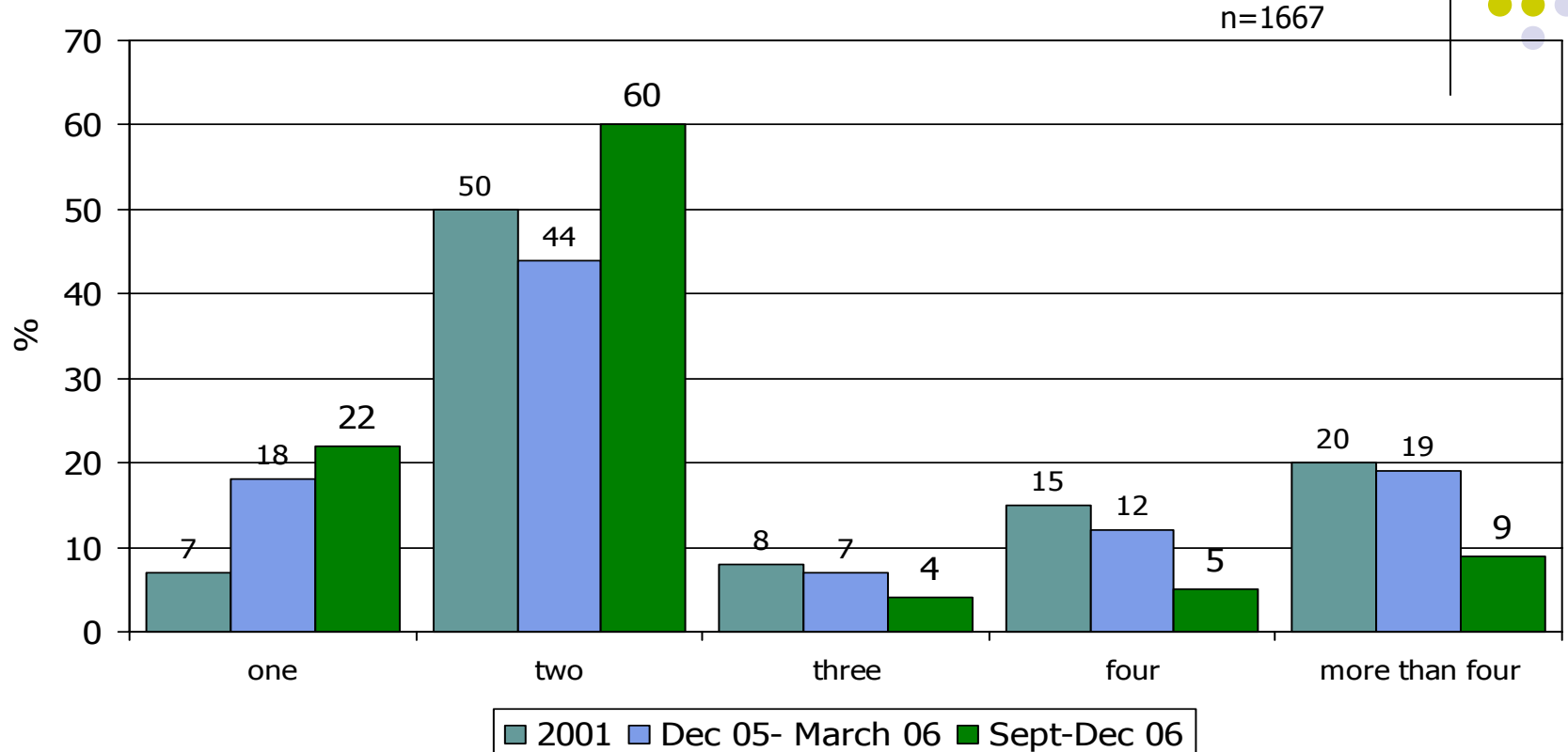
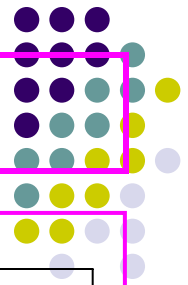
A high number (31%) of the respondents indicated that their visit to Jamaica was far better than expected.

# How likely would you be to recommend Jamaica to your friends?

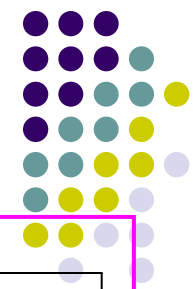


The majority (71%) of the visitors stated that they would recommend Jamaica to family and friends.

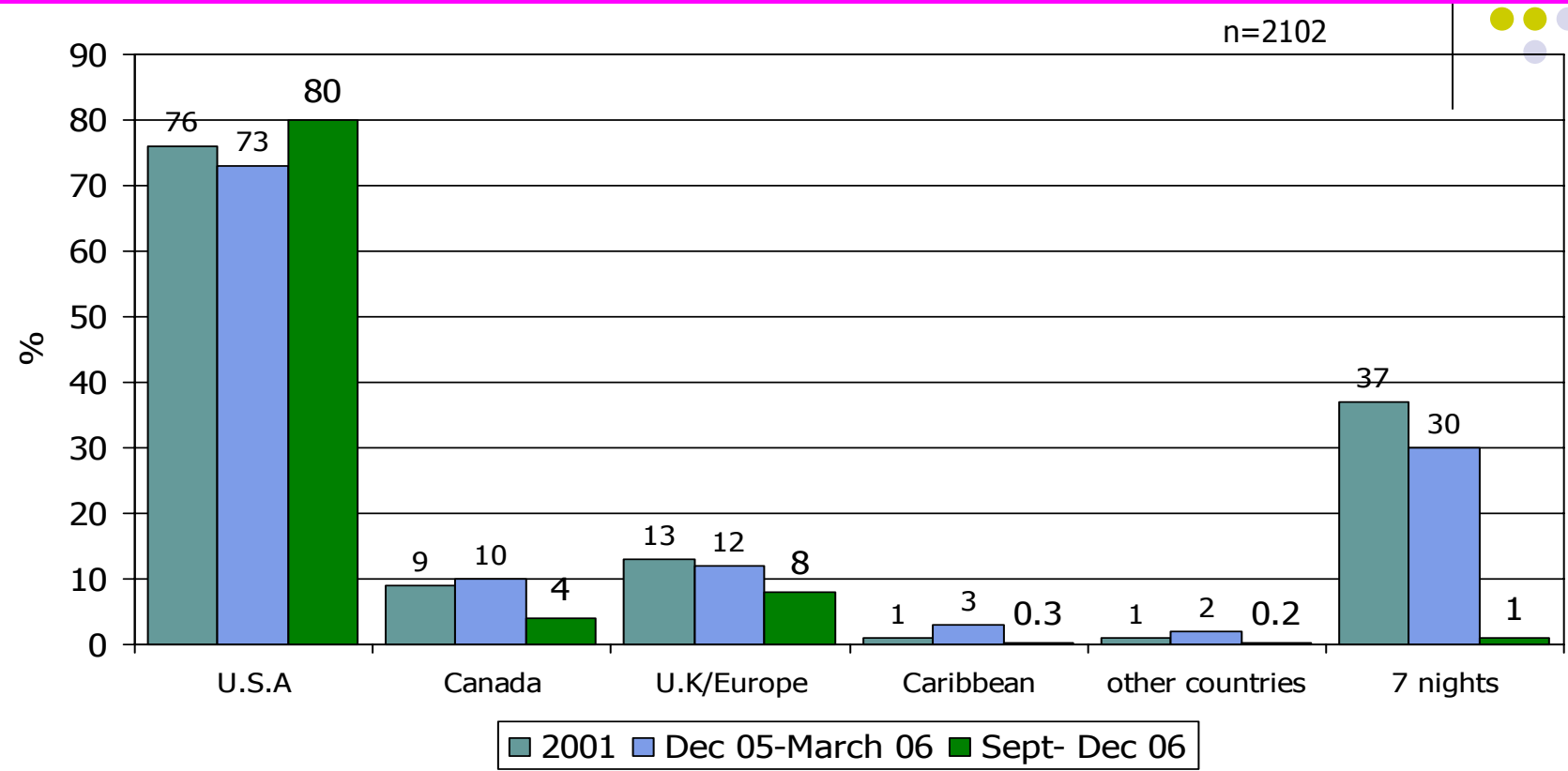
# How many persons in the party



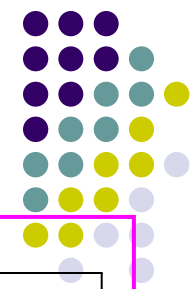
The majority (60%) of the person who visited between September and December 2006 were in groups of two.



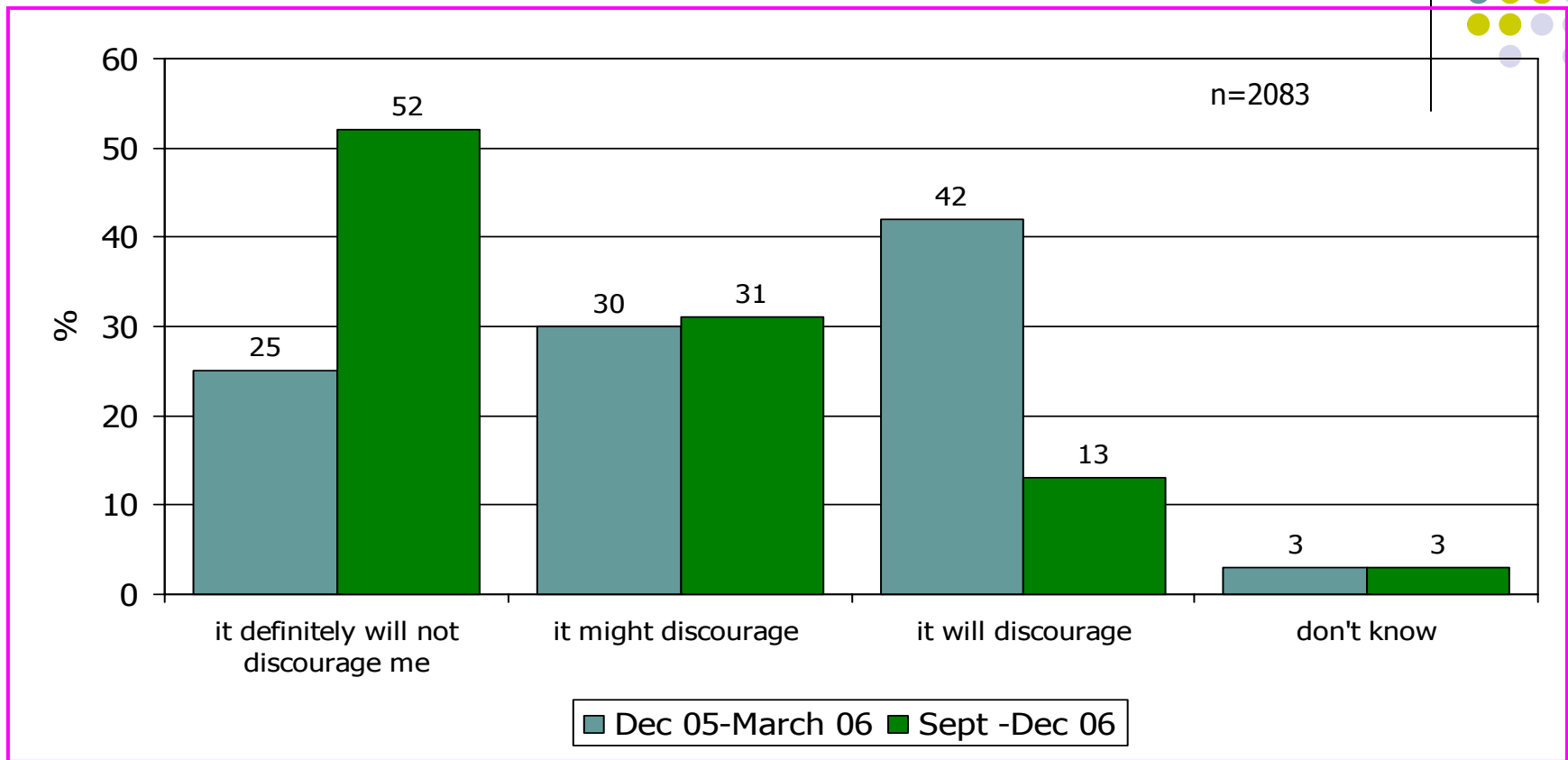
# Country of residence



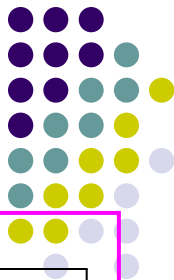
The majority (80%) of the visitors were from the U.S.A.



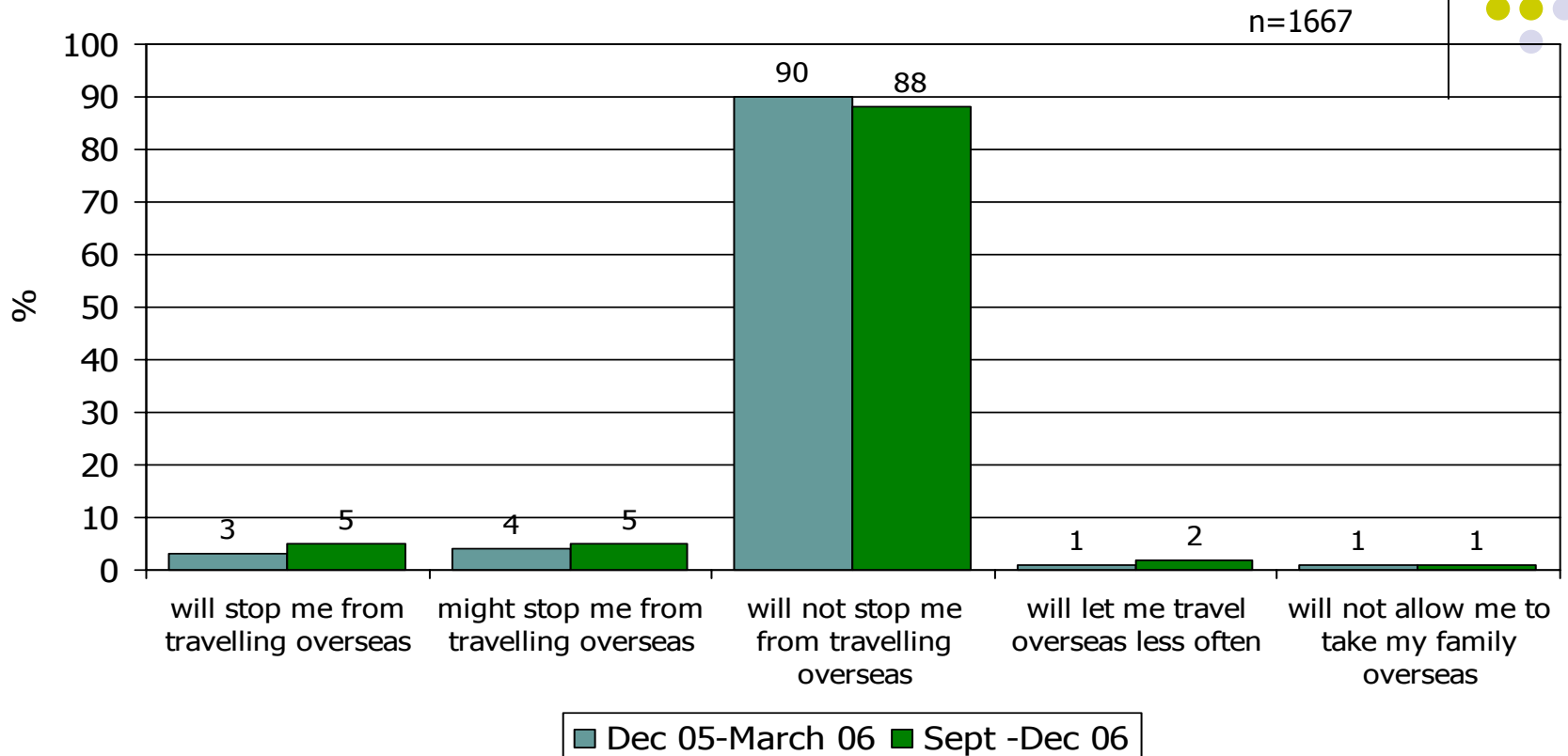
## Statements that describes how you feel about hurricane season (June-November)



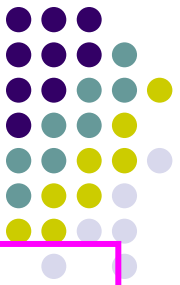
The majority (52%) of the visitors stated that during the hurricane season they will not be discouraged from traveling to Jamaica. A significant number on the other hand stated that the Hurricane Season might discourage them. 13% stated that they will definitely be discouraged from traveling during that time.



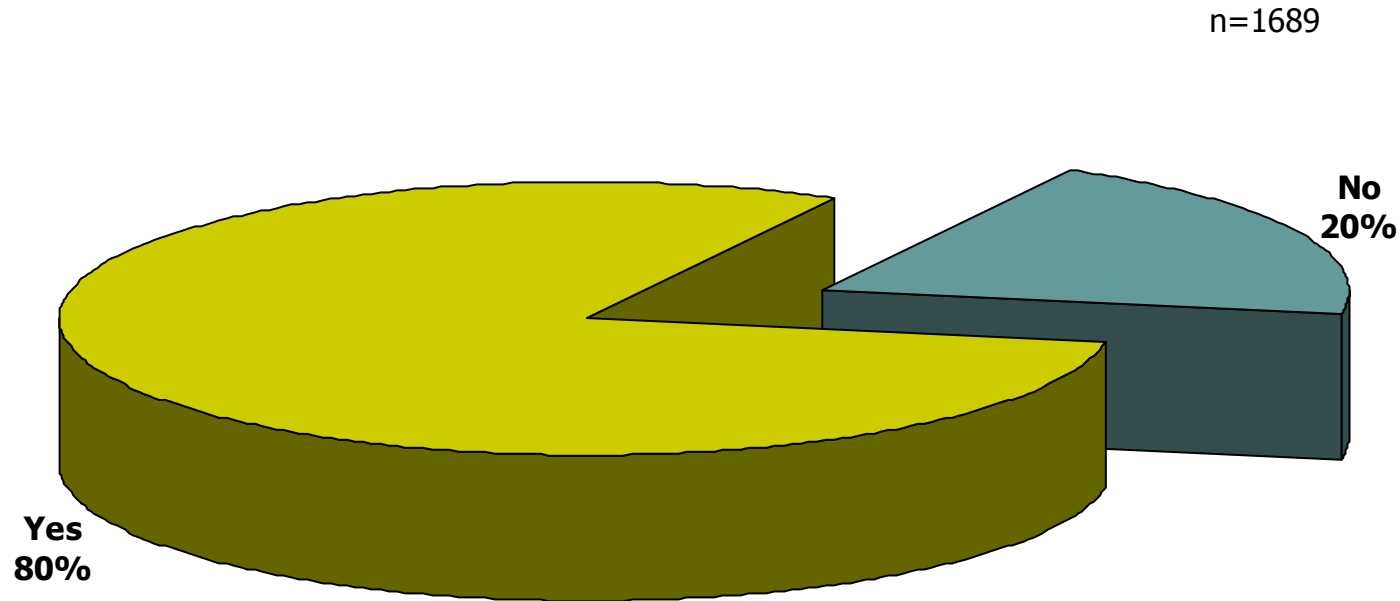
## Would you say that the new US requirement for passport to travel overseas by next year....



They were also asked how they felt about the US requirement for passport to travel overseas. The majority (88%) stated that it will not stop them from traveling overseas.

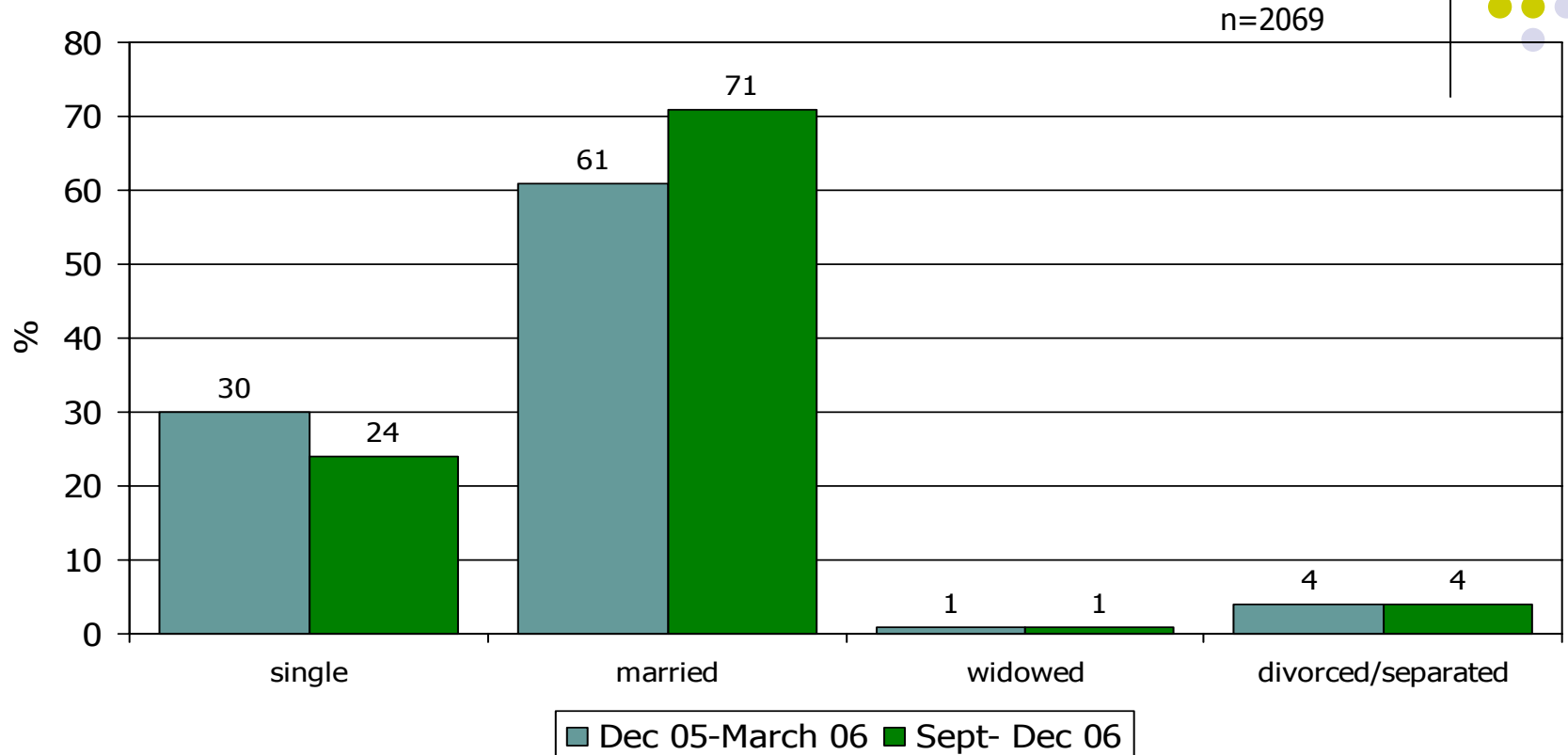


## Was Jamaica your first choice for your vacation?

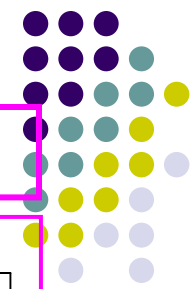


The majority (80%) of the respondents indicated that Jamaica was their first choice for vacation.

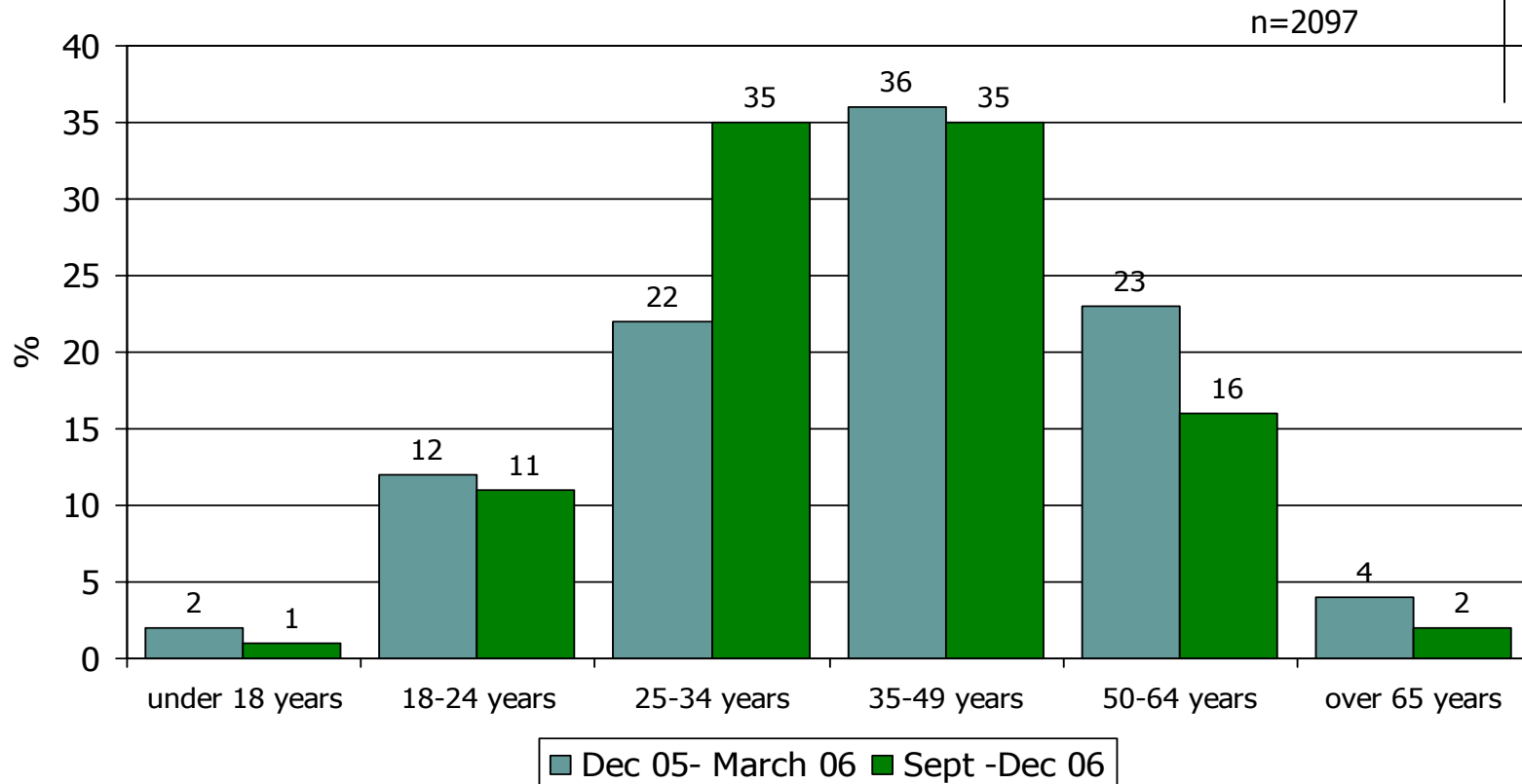
# Marital status



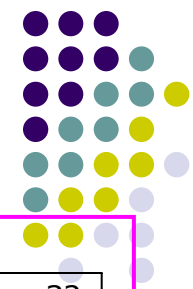
The majority (71%) of the persons who visited were married.



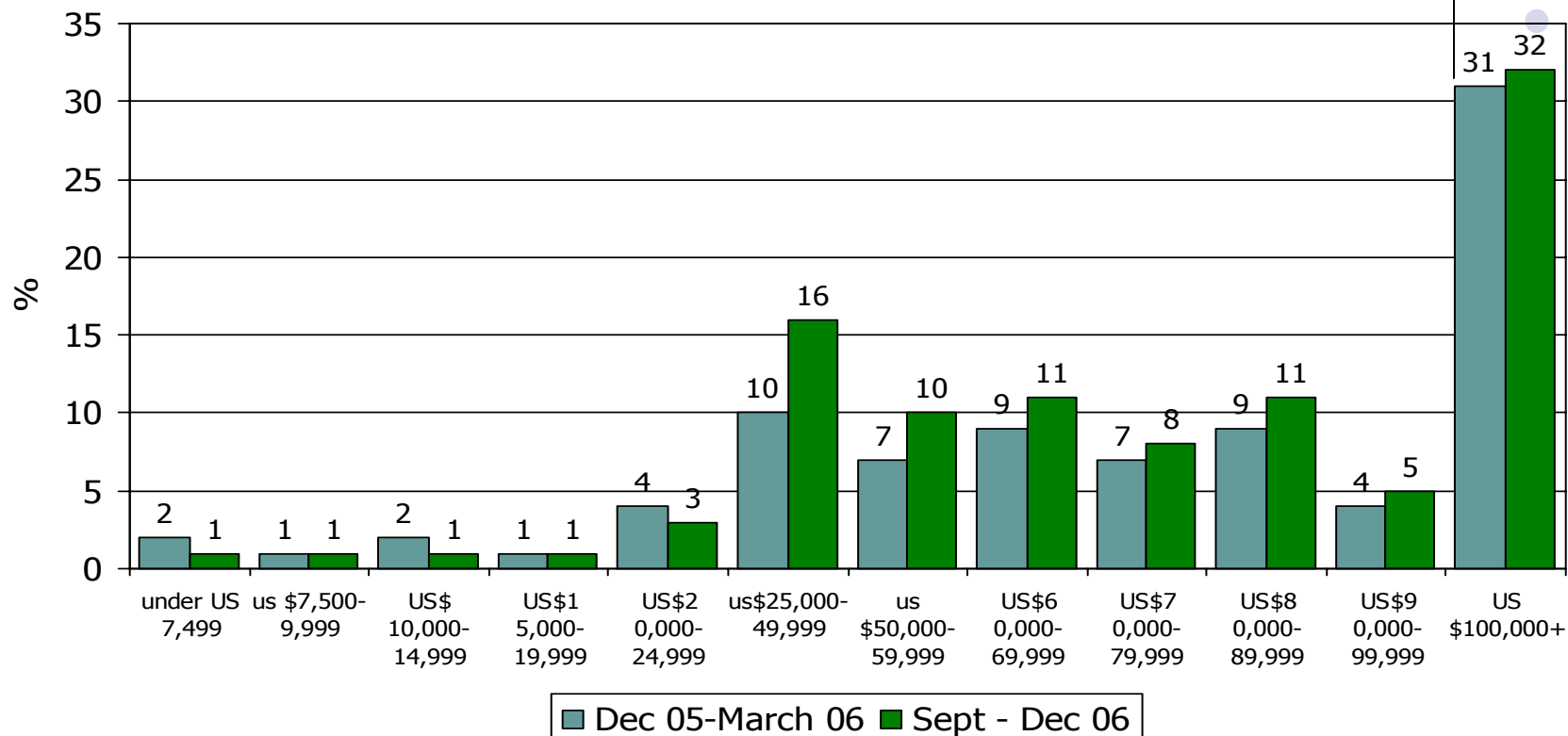
# Age group



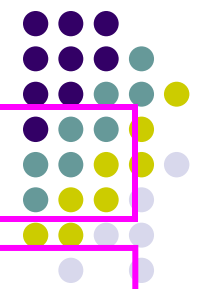
The majority (53%) of visitors were in the older age group (35 years and over )



## Annual Household Income before taxes

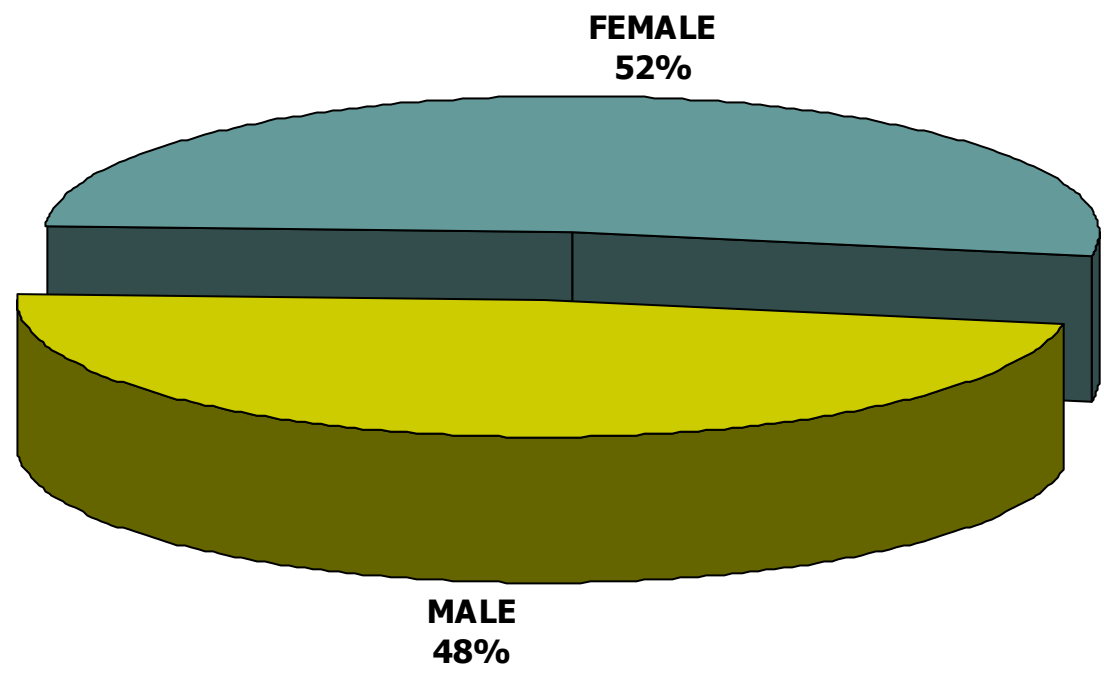


The highest number of the visitors (32%) indicated that they earned US \$100,000 and over.



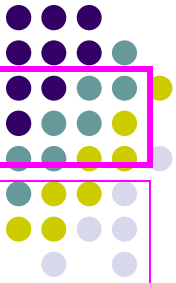
# Gender

n=2028



There were more female than male visitors.

# Comments



## Positive

### Hotels/Resorts

- "Love the all inclusive hotels"
- "Our resort was wonderful. It made our vacation perfect. I would not visit without staying at an All Inclusive Resort".
- "Sandals Whitehouse was the best place we have ever been".
- "Sunset Beach Resort really saved our vacation. Excellent staff and facilities".

### Attractions

- "Negril and the Caves were outstanding"

### Airport

- "Airport looks great- doing a great job, will be back"
- "Airport much better"
- "Great addition to airport"
- "Keep up the good work improving the airport"

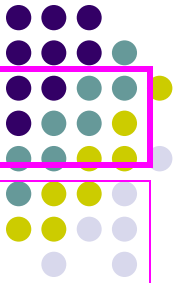
### Roads/Transportation

- "I like the improvements being made to the roads also the expansion of the resort in Montego Bay"

### Hospitality/Service

- "21 years here and I will be back"
- "Beautiful country"
- "Enjoyed the vacation in Jamaica. Friendly people lots of fun".
- "Everyone was friendly and helpful. Didn't leave the resort except to and from the airport".
- "Excellent- loved it. Will be back next year. Big up Jamaica".
- "Great time/great beaches/ nice laid back atmosphere"
- "Haven't been to Jamaica for several years, but have been impressed with everything"
- "I appreciated seeing local benefits from various resort functions"
- "I would like to thank the people of Jamaica for making me feel at home here. One love, respect. I'll be back soon"
- "Jamaica has the potential to be great tourist destination- keep up the good work"

# Comments



## Negative

### Hotels/Resorts

- Accommodation needs to be upgraded- Hilton
- "bugs were a problem at the resort"
- "I wish it was less expensive to stay at a resort here"
- "Jamaica Grande needs working Ice Machines on every floor or every other floor"
- "Sandals. com was very unwilling to work with us to fix a situation"
- "the Grand Lido did not make it very easy, friendly or affordable to leave the resort and explore Negril"
- "There are a lot of hidden costs in the hotel bill"

### Attractions

- "Beaches are lovely but they badly need cleaning (Kingston)
- "Clean up beaches in Ocho Rios"
- "Would have liked to see attractions, but not comfortable leaving the resort"

### Airport

- "Air conditioning in the airport is lacking"
- "Airport staff could be more friendly"
- "Clean area behind the airport"
- "Cleaner restrooms on arrival"

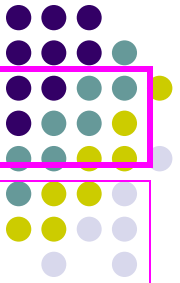
### Airline

- "Air Jamaica needs to call you when they cancel your flight"
- "food on the airline too limited"
- "I will never use Air Jamaica again"
- "Lack of communication between Air Jamaica and their passengers. Flight was cancelled and my wife found out on-line in Barbados before we did in the airport"

### Harassment

- "a bit disappointing with the harassment on the streets"
- "people expect tipping too much"
- "The harassment was ridiculous in town"

# Comments



## Negative

### Roads/transportation

- "Better road service"
- "It is very scary to take the bus from Kingston to Montego Bay"
- "Roads are terrible"

### Attractions

- "Beaches are lovely but they badly need cleaning (Kingston)"
- "Clean up beaches in Ocho Rios"
- "Would have like to see attraction, but not comfortable leaving the resort"

### Airport

- "Air condition in the airport is lacking"
- "Airport staff could be more friendly"
- "Clean area behind the airport"
- "Cleaner restrooms on arrival"

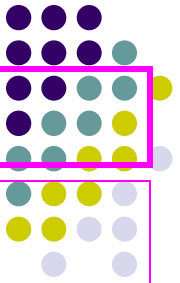
### Airline

- "Air Jamaica needs to call you when they cancel you flight"
- "food on the airline too limited"
- "I will never use Air Jamaica again"
- "Lack of communication between Air Jamaica and their passengers. Flight was cancelled and my wife found out on-line in Barbados before we did in the airport"

### Harassment

- "a bit disappointing with the harassment on the streets"
- "people expect tipping too much"
- "The harassment was ridiculous in town"

# Comments

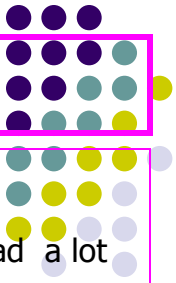


## Negative

### Hospitality/ Service

- "clean up corruption and violence in Jamaica"
- "clean up Kingston"
- "clean up unfinished construction and hurricane wreckages- make area feel abandoned"
- "customer service needs improvement. Too much begging on the streets"
- " I did not feel safe. There needs to be an airport closer to Negril"
- "I didn't realize that Jamaica accept US dollars as payment"
- "it's expensive in Kingston to shop"
- "Need to treat black tourist better. It appeared that my lady and I could not get service of the best quality like the whites were"
- "shopping is too expensive"
- "very surprised at the amount of litter everywhere"
- "we love to walk, but safety issues confined us to the resort. It is a very important concern"

# Comments



## Mixed reactions

### Hotels

- "Accommodation needs to be better in Kingston. Jamaica is a beautiful country. The people are friendly I had a lot of good things to remember"
- "Would not recommend RIU . I would however recommend a trip to Jamaica"

### Attractions

- "Roaring River great site but the staff tried to hustle me"

### Beaches

- "Beaches are lovely but they badly need cleaning (Kingston)"

### Airport

- "The airport is very disorganized especially the baggage claim area, but the people are friendly"

### Harassment

- "Beautiful place. Too much pressure to buy and pay for services"
- "Something needs to be done to decrease tourist harassment and aggression. I have referred many colleagues to Jamaica and this is their usual complaint"
- "Sort out tipping"

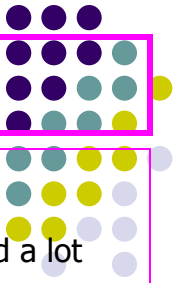
### Roads/Transportation

- "it is nice to see that the roads are upgraded, but the traffic flow isn't good"

### Hospitality

- "Food was very good. Overall the people we met were very friendly. Very expensive vacation for three nights"
- "I love the island and the people, however I would not bring my children"
- "I loved Jamaica, but did not feel safe to travel outside of Sandals"
- "Jamaica is a naturally beautiful place given by God. If this country cannot get the politics under control then the tourism industry is doomed"
- "Like Jamaica except for the beggars on the streets and the potholes in the road"
- "Love this country – cut down the crime"
- "Lovely people, however, control the crime and provide more jobs for young people"
- "Tourwise drivers were friendly and informative. Workers at stores in town were pushy and made the trip stressful"
- "Very nice. We had an excellent time. We were concerned about the lack of marine life on our snorkeling tour and the health of your local reefs"

# Comments



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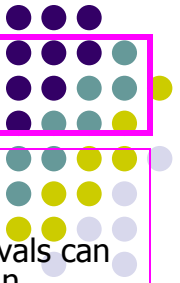
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# Comments



## Recommendations

### Hotels

- "Cultural events such as Maypole, dance, dub poetry, dancehall competition, Portland's Bussu and Jerk Festivals can be offered as attractions to visitors at the All-Inclusive hotels. Tourism and hospitality should be introduced in primary and high schools".
- "I think there should be more interaction between the staff and guests (for example soccer games)".
- "Improve the quality of the hotels, especially the prices, they are too high".
- "Improve the quality of hotels in Kingston. Hilton is falling apart at the seams, Pegasus needs upgrading".

### Attractions

- "Jamaica would do better if the tourist attraction prices were lower. More would go on the excursions"
- "Would like to see more Jamaica products for tourists to take abroad"

### Airport

- "Custom's policy needs to be very clear"
- "Fix A/C in airport"
- "For further improvement for us when arriving at the airport (immigration and customs)".
- "Free water (fountains) in airport"
- "Would like to see the arrival area improve (it needs to be covered place if it rains)"
- "You should be allowed to have a beverage and drink it before you go on the plane. They take your drink before you go to customs".

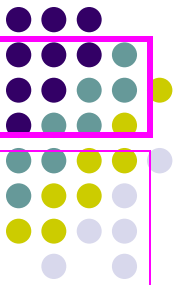
### Airline

- "Please return Air Jamaica direct to Boston"
- "Suggest the premium passengers are made to feel welcome and 450 pounds extra is too much to pay for the treatment we received. Premium disappointing"

### Roads/Transportation

- "Fix roads".
- "Improve security on the streets"
- "To make Jamaica more accessible to visitors from the USA there needs to be more road signs. The amps aren't of much use".

# Comments



## Recommendations

### Hospitality

- "Coco Cola should be sold in more bars and hotels as it is so much better than Pepsi".
- "If you implement a marine reserve, it would increase tourism. People love to snorkel, scuba diving. Right now there is nothing to see".
- "Love the new airport. More consolidated destination from the tourist board? A list if worthwhile stops- we had to find Rick's Café ourselves"
- "Make Kingston a major tourist attraction".
- "Make the local entertainment more accessible to visitors".
- "Don't let people bother us to buy things"
- "More awareness and information for visitors. Maybe make brochures available of places to go things to do"
- "Much greater effort needs to be made to restore/protect Jamaica's reefs. We were prepared to go diving here. But did not because the fish and corals were in bad shape".
- "The tourist strips need to be more secured"
- "Would love to see customer service awareness. There a lot of improvements being made which is excellence".