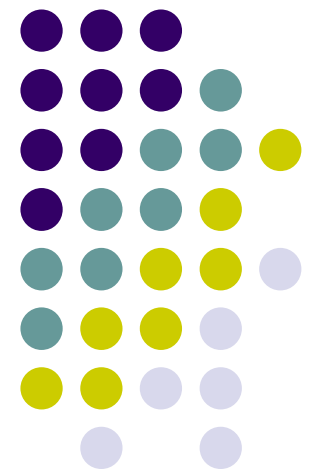


# Visitor Opinion Survey

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January- March 2007





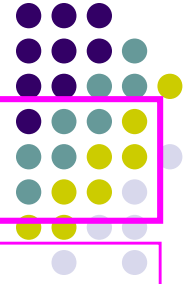
# Background

- One of the main objectives of any tourist destination is ensuring that the visitor's 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. The survey also enables policy makers to identify current and emerging issues as they relate to the services and facilities provided for tourist visiting Jamaica.
- This report details information collected from visitors who departed from the island between January to May 2007. 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 January to May 2007 analyzed against data gathered September to December 2006. 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.
- To determine the demographic, economic and geographic data of tourists leaving Jamaica during the time of the survey.

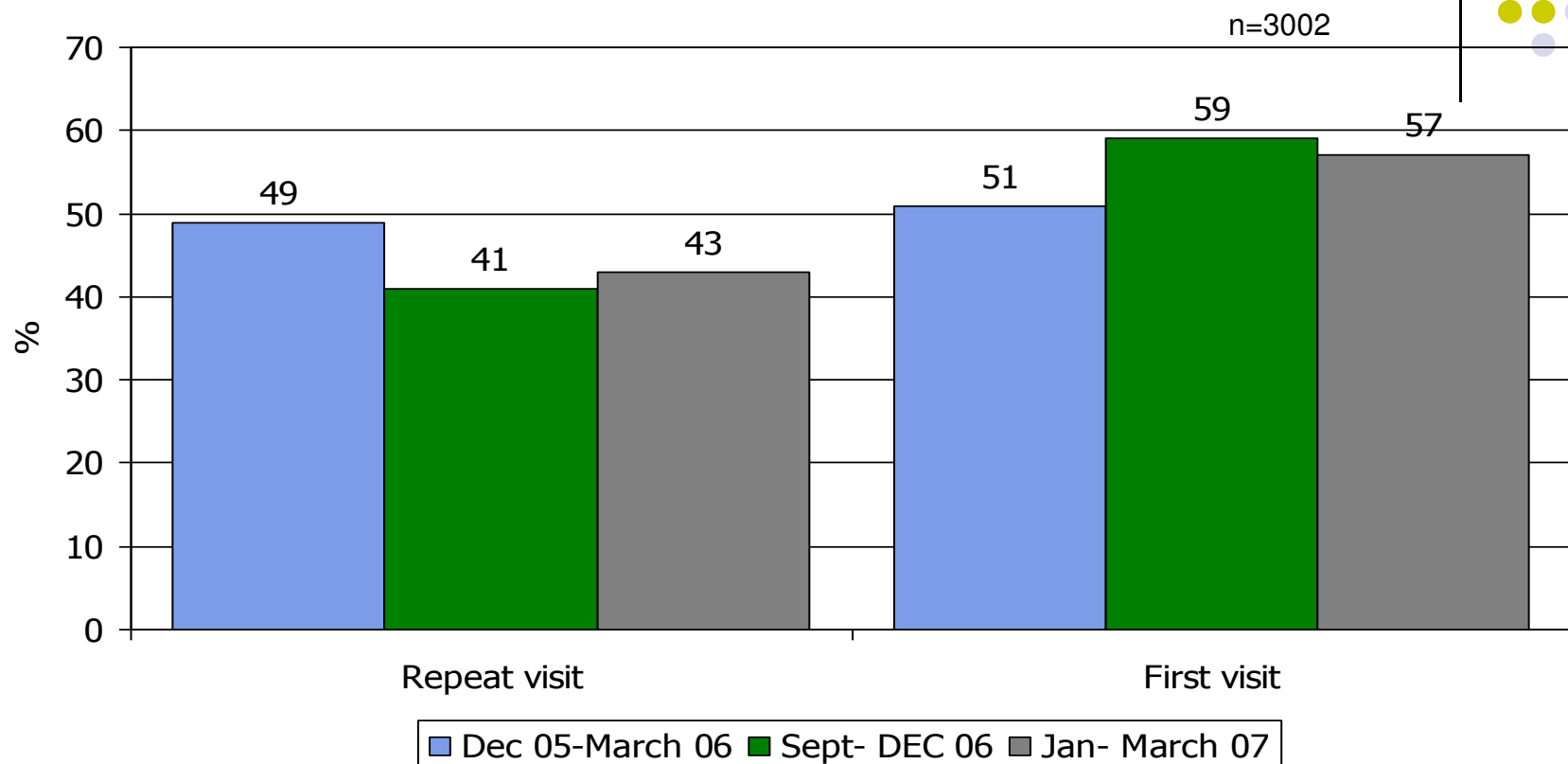
### **Methodology**

- 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**

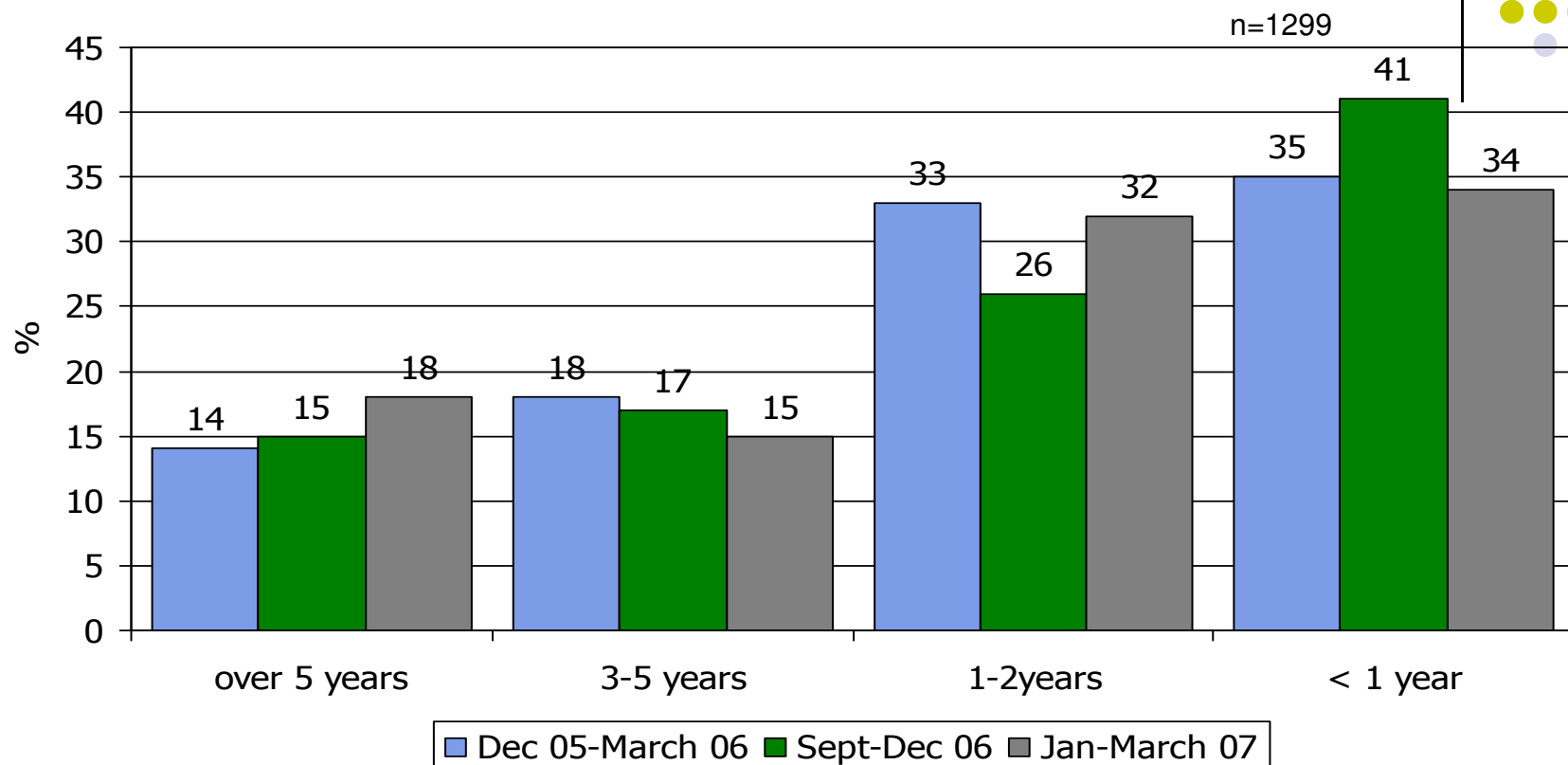
- Interviews were conducted January – May 2007.

## Is this your first visit to Jamaica?

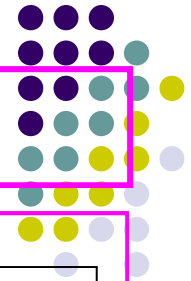


There is a slight decrease of first time visitors to Jamaica when comparing data from September to December 06 and January to March 07. When comparing the same periods (Dec 05- March 06 and Jan – March 07) the data shows an increase in first time visitors for the period January to March 07.

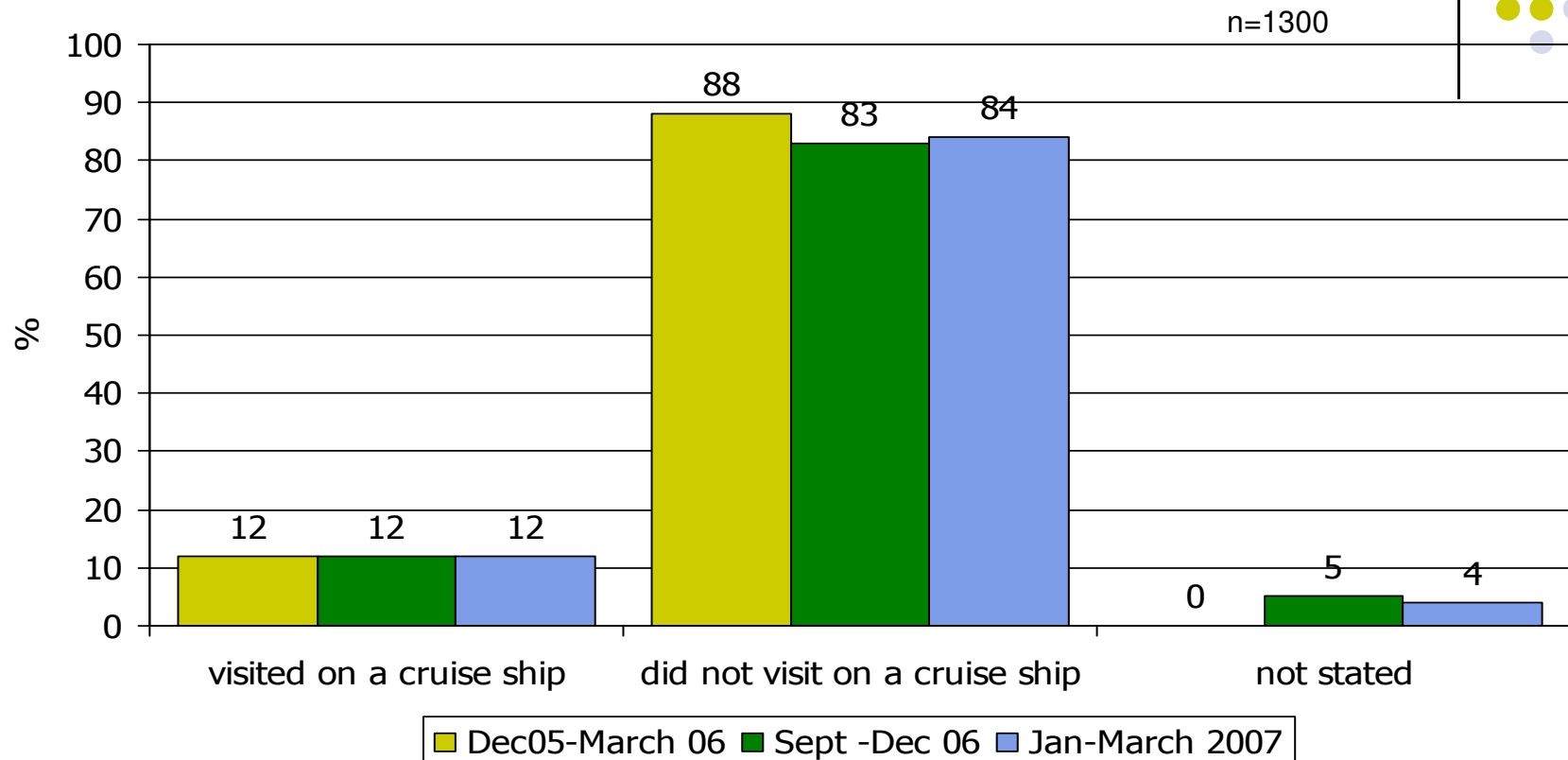
## Last trip to Jamaica



The repeat visitors were asked to say when they last visited Jamaica. 34% indicated that they did so less than one year ago. The next highest number indicated that they last visited between 1 to 2 years ago.

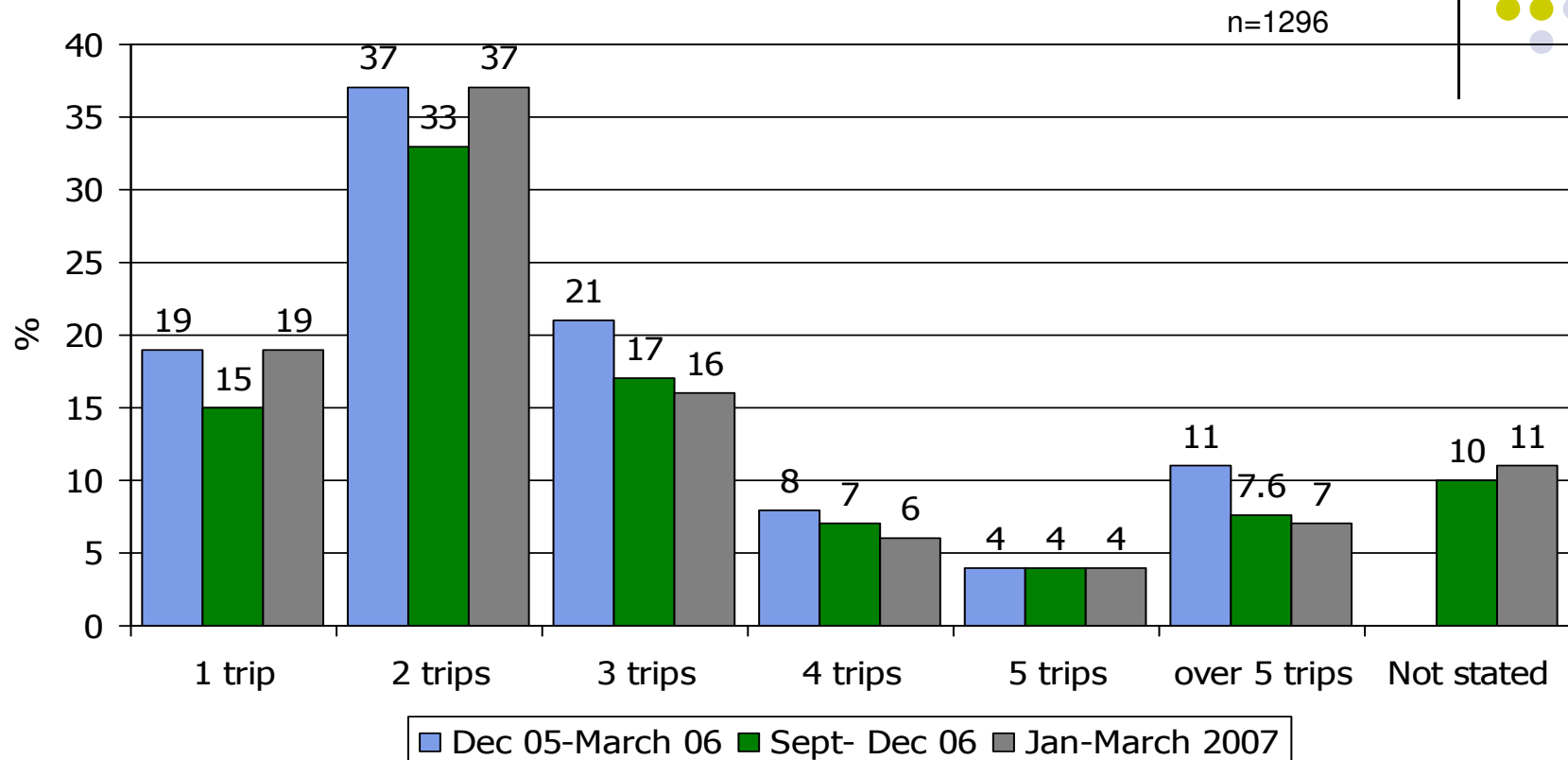


## Was previous visit to Jamaica on a cruise?



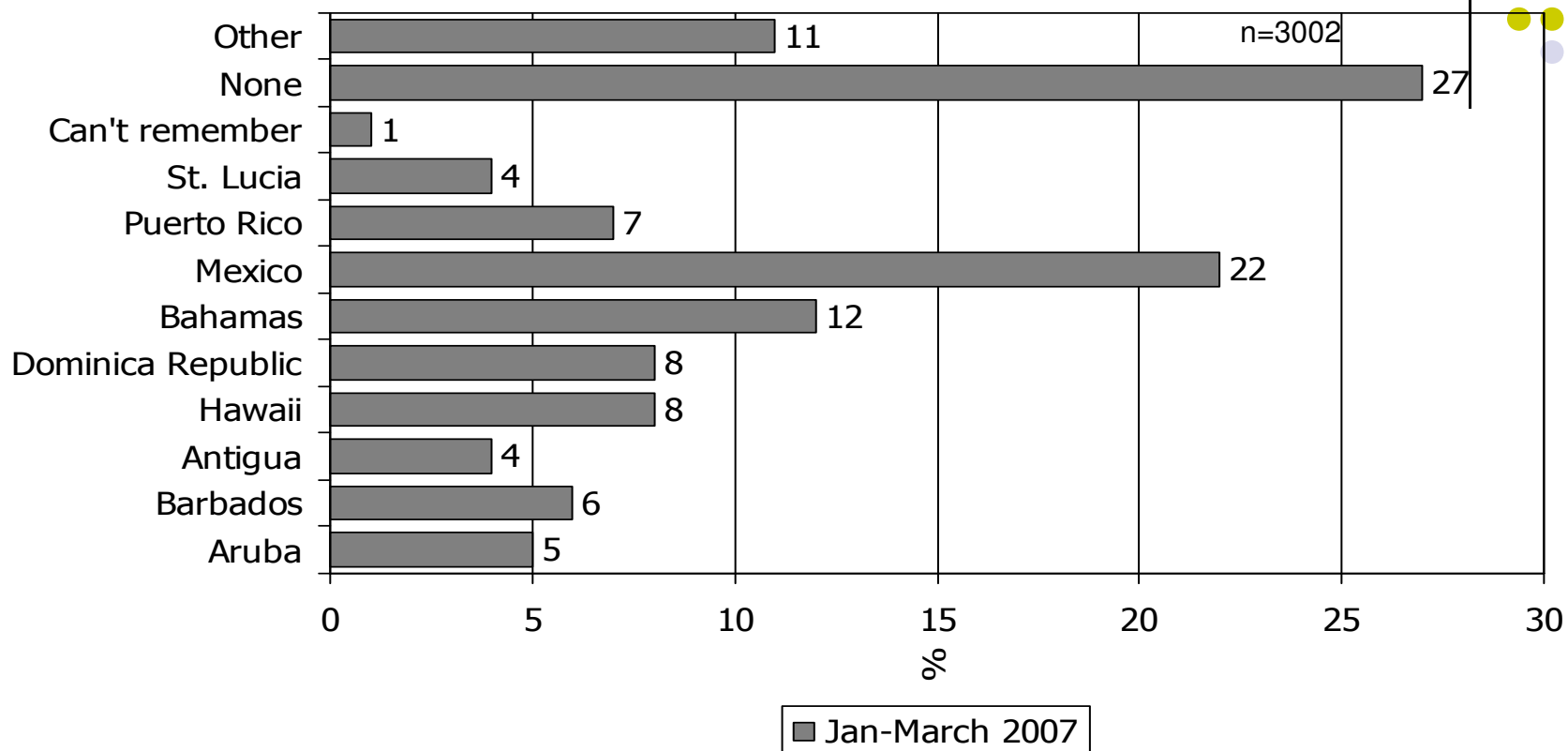
The conversion of Cruise passengers to Overnight guests remains constant at 12 % for the past three survey periods.

## Number of visits in the last 3 years



Those repeat visitors who visited within the last three years were asked to state the frequency of their visits. The highest number indicated that they have made at least 2 trips within the last 3 years.

## Destination visited in the past 3 years



Mexico was the country visited by the highest number of the respondents in the past 3 years.

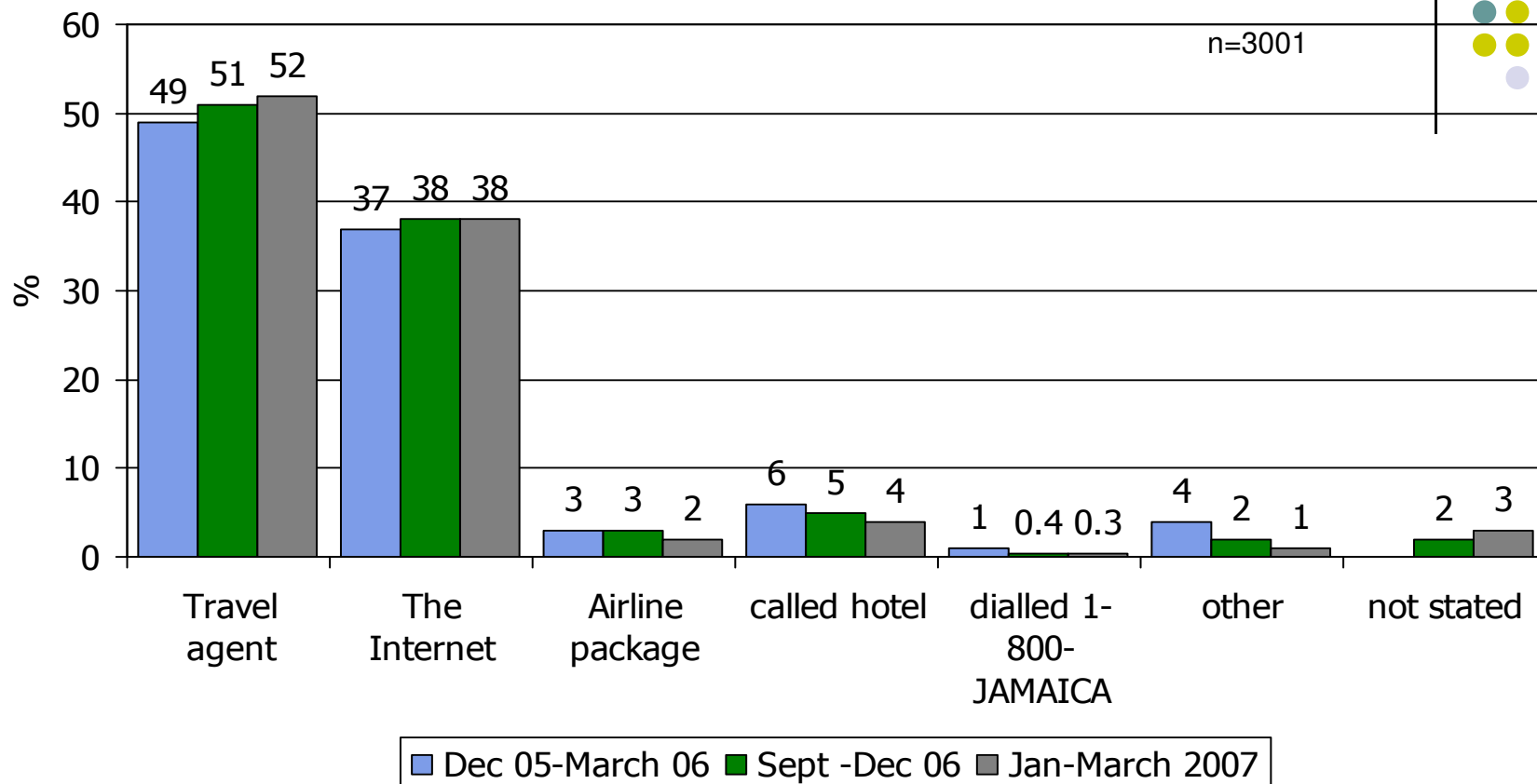


## How do you rate this trip to Jamaica with your trip to any of these destinations visited within the last 3 years?

Country	N	Jamaica Superior	Other Superior	About the same
		%	%	%
Aruba		50	27	24
Bahamas		48	18	34
Barbados		55	23	22
Mexico		54	12	33
Antigua		57	16	26
Puerto Rico		62	14	24
Hawaii		28	40	32
St. Lucia		50	19	31
Dominican Republic		58	13	29
Other		43	23	35

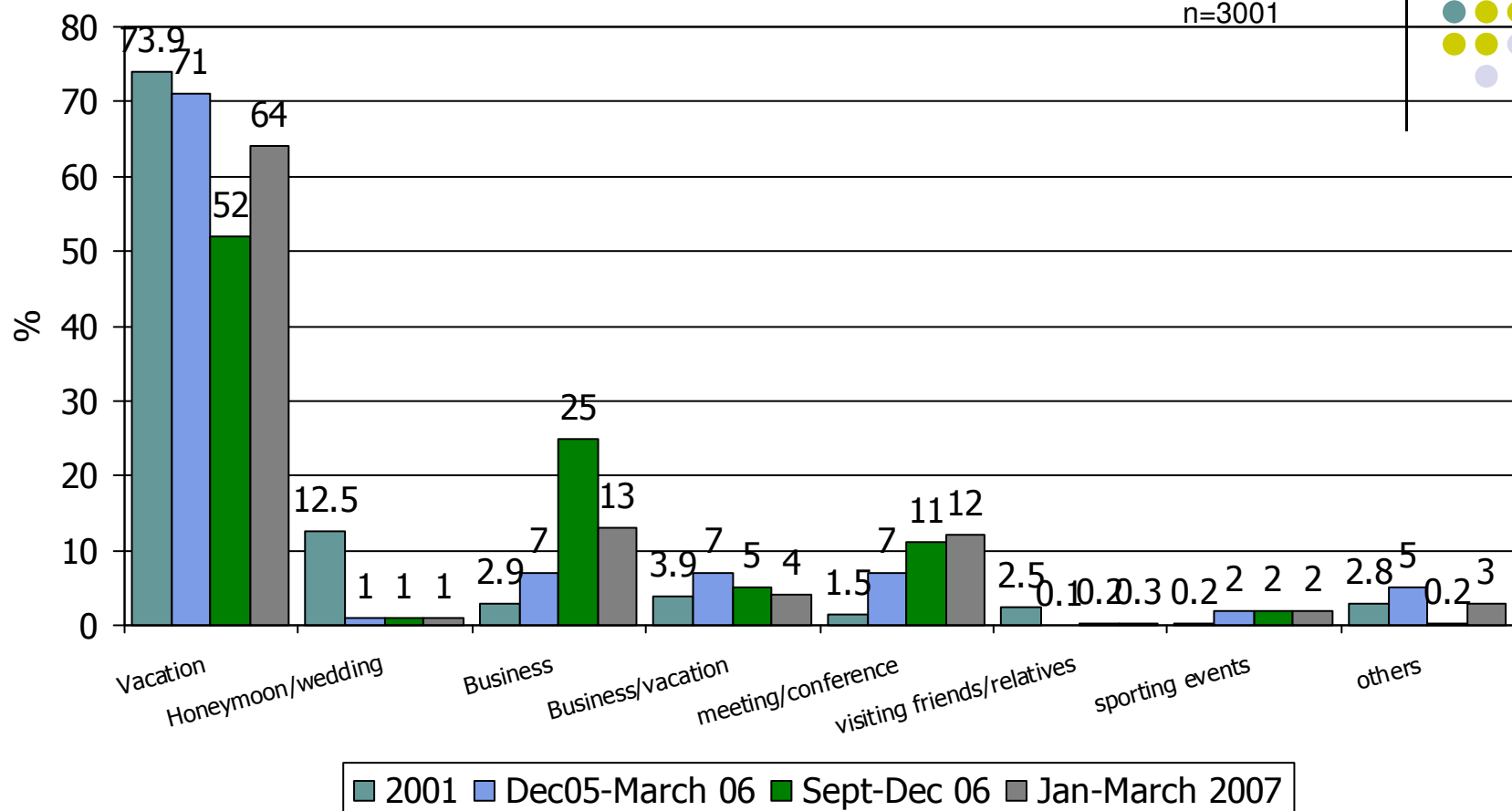
Of the destinations visited within the past 3 years the respondents were asked to rank whether they consider Jamaica to be superior; the other country superior; or about the same. Over 50% considered Jamaica to be superior to Barbados (55%), Mexico (54%), Antigua (57%), Puerto Rico (62%) and Dominican Republic (58%). A large percentage of the respondents thought Hawaii was superior to Jamaica.

# What method did you use to make your reservation?

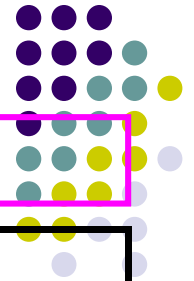


Most (52%) of the respondents used a travel agent to make reservations. The percentage of respondents who used the Internet to make reservation was 38%. This percentage has remained fairly constant for the past 3 periods.

# What was the main purpose of your visit?



Visitors come to Jamaica for numerous reasons. When asked to state the main purpose for visiting Jamaica the majority (64%) indicated that they are here for a vacation. This has consistently been the main purpose by the majority of the respondents over the survey periods to visit Jamaica.



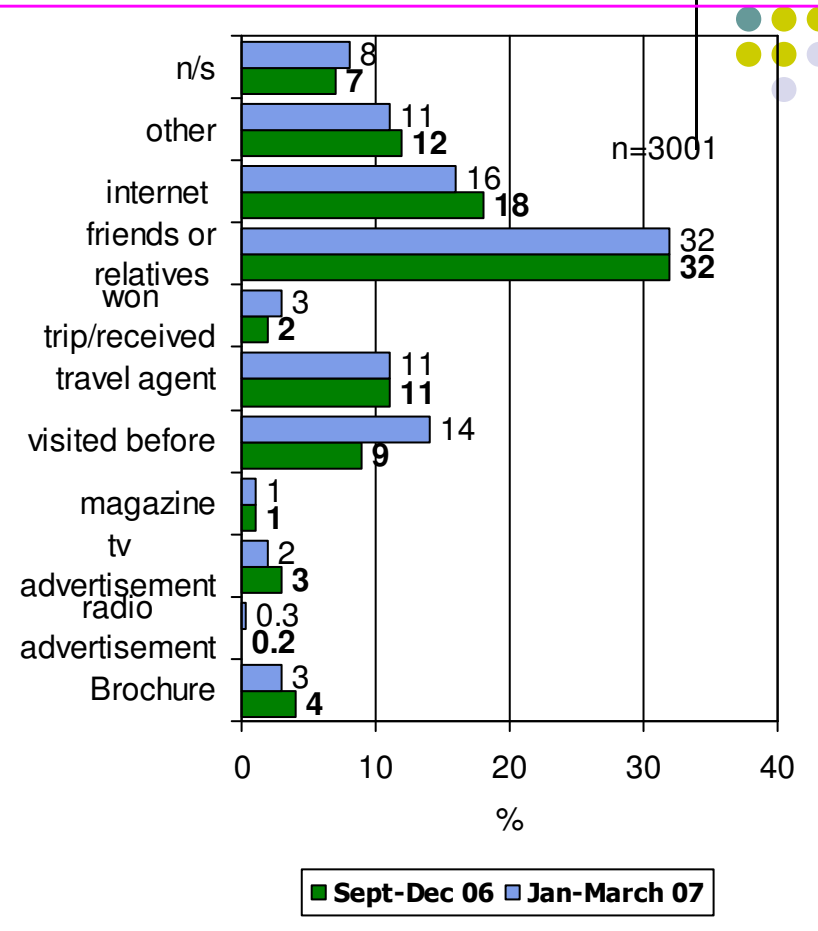
## Purpose of visit vs. first and repeat visitors

Purpose of visit	Type of visitors	
	First time visitors	Repeat visitors
	%	%
Vacation	65	63
Business	21	4
Meeting/conference	7	18
Sporting events	2	3
Honeymoon/Wedding	0.4	2
Business/Vacation	2	8
Visiting Friends/ relatives	0.3	0.4
Travel Agent Fam. Trip	0.2	0.1
Other	2	4

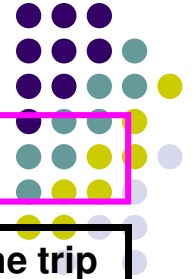
There were more first time visitors here on vacation than repeat visitors, albeit not a significant difference. A significant number of the first time visitors on the other hand were here for business in comparison to a mere 4% of repeat visitors.

## 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
	%	%	%	%
<b>Brochure</b>	16	21	25	39
<b>Radio</b>	2	6	28	65
<b>TV</b>	6	19	26	49
<b>Magazine or news paper</b>	7	20	26	48
<b>Visited before</b>	34	9	15	43
<b>Travel agent</b>	30	18	14	38
<b>Won trip/ gift</b>	7	4	13	76
<b>Friends or relatives</b>	46	20	10	25
<b>Internet</b>	41	24	11	24
<b>other</b>	45	2	8	44



- Friends/ relatives (46%) and the Internet (41%) are considered to be very important by close to 50% of the respondents in influencing their decision to visit Jamaica.
- When asked to state the single most important factor that influenced their decision to visit Jamaica a high number of the respondents stated friends/ relatives (32%). This was the same for the previous period. One can therefore conclude that 'word of mouth' plays an important part in advertising Jamaica to prospective visitors.

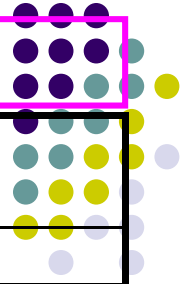


## Impression of Jamaica before and after visit

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

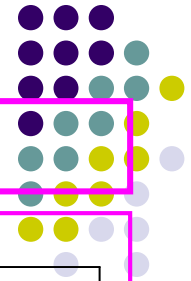
Overall the visitors had a favorable impression of Jamaica before and after their visit. With one (1) being the lowest and ten (10) being the highest. It is evident that the visitors gave Jamaica a high rating on all the characteristics, with the exception on 'Jamaica being a safe place to visit'. This was given a mid-point rating before their visit but increased on the scale after their visit.

## How interesting were the following

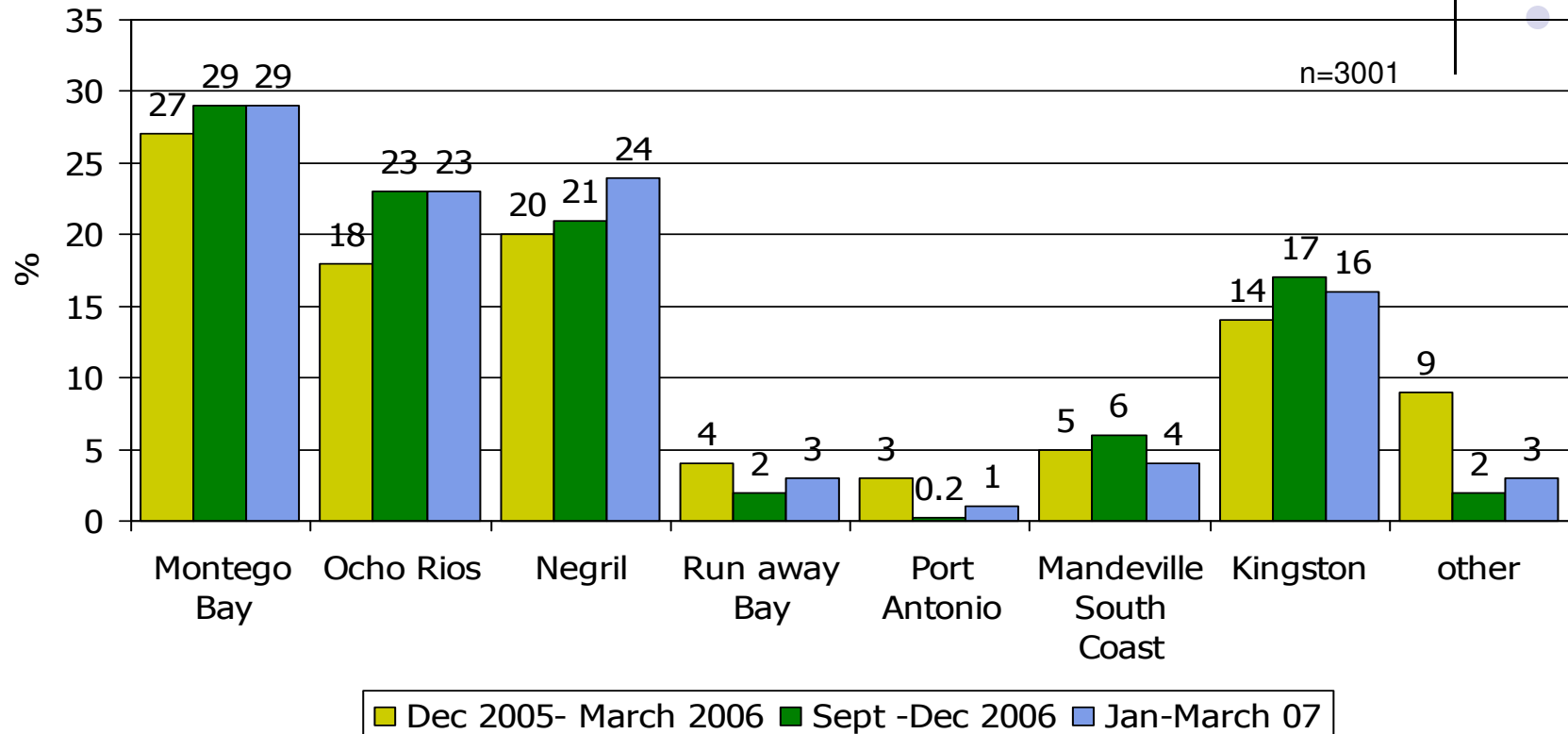


Statements	Very interested	Somewhat interested	Not very interested
	%	%	%
How interested were you in visiting nature areas	35	33	31
How interested were you in guided tours	23	35	42
How interested were you in shopping	29	38	34
How interested were you in dining out	49	31	20
How interested were you in the beaches	81	13	7
How interested were you in water sports	39	34	26
How interested were you in nightlife activities	34	38	29
How interested were you in other activities	54	15	31

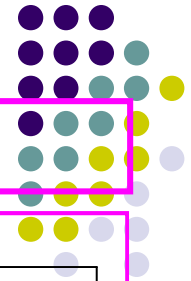
- An overwhelming majority (81%) of the visitors were very interested in the beaches during their trip to Jamaica.
- A large number (49%) indicated that they were interested in dining out.



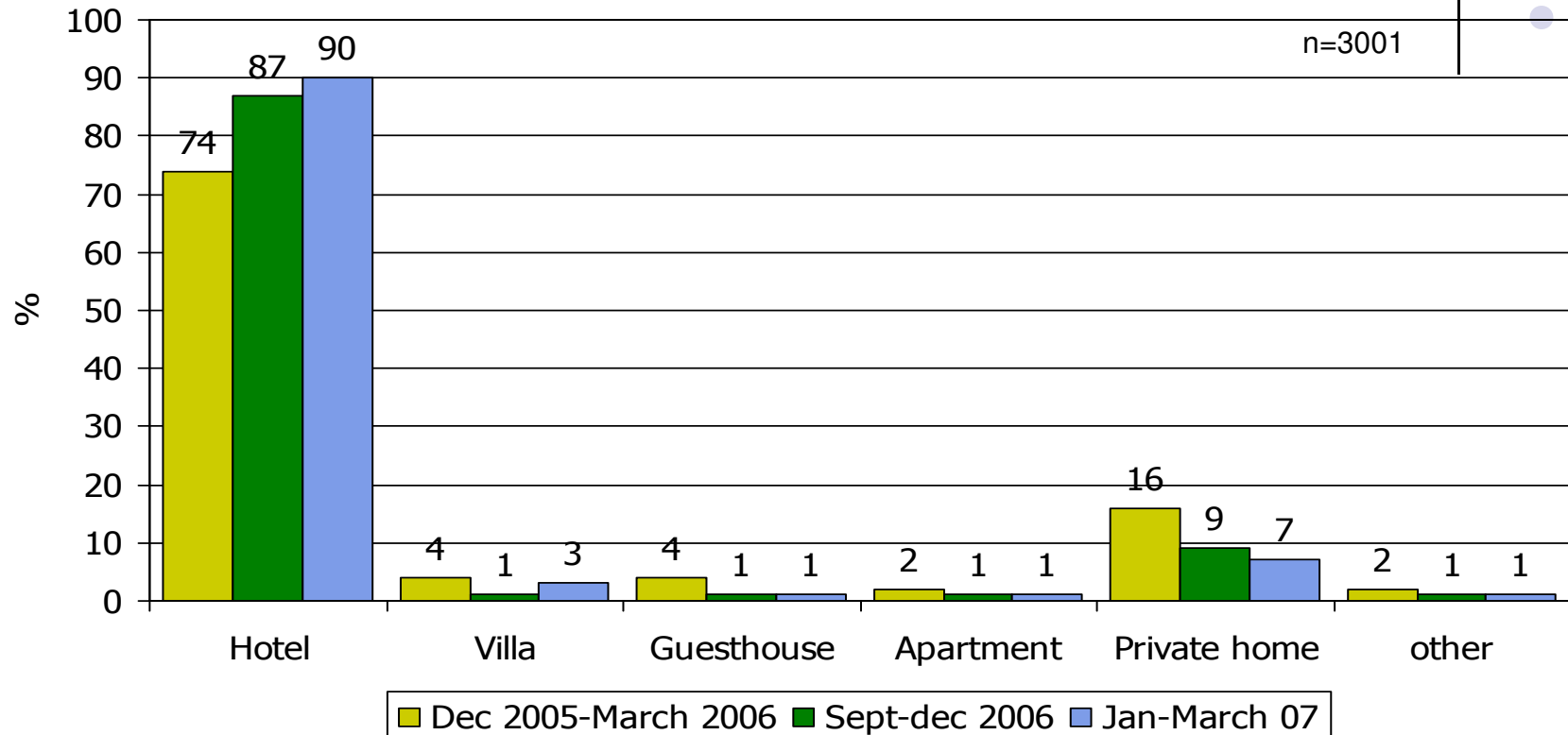
## Areas visited



The North Coast was the resort area visited by most (52%) of the respondents.

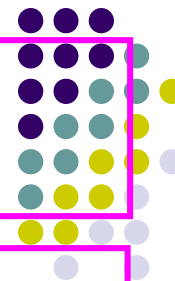


## Type of accommodation used



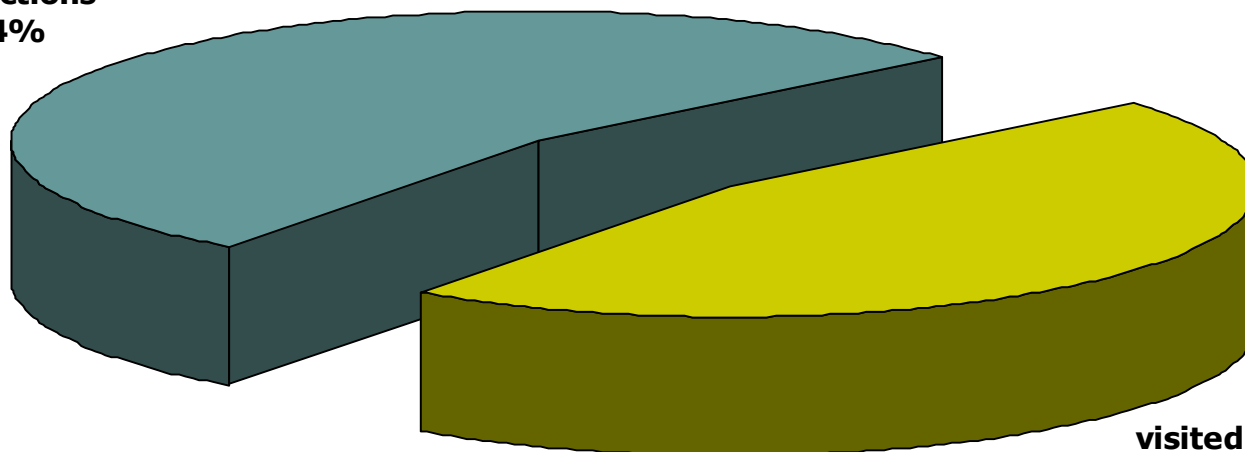
There is a slight increase in the number of persons staying in a hotel. For the period January-March 07 the majority (90%) indicated that they stayed in a hotel during their visit.

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



n=3001

did not visit any  
attractions  
54%

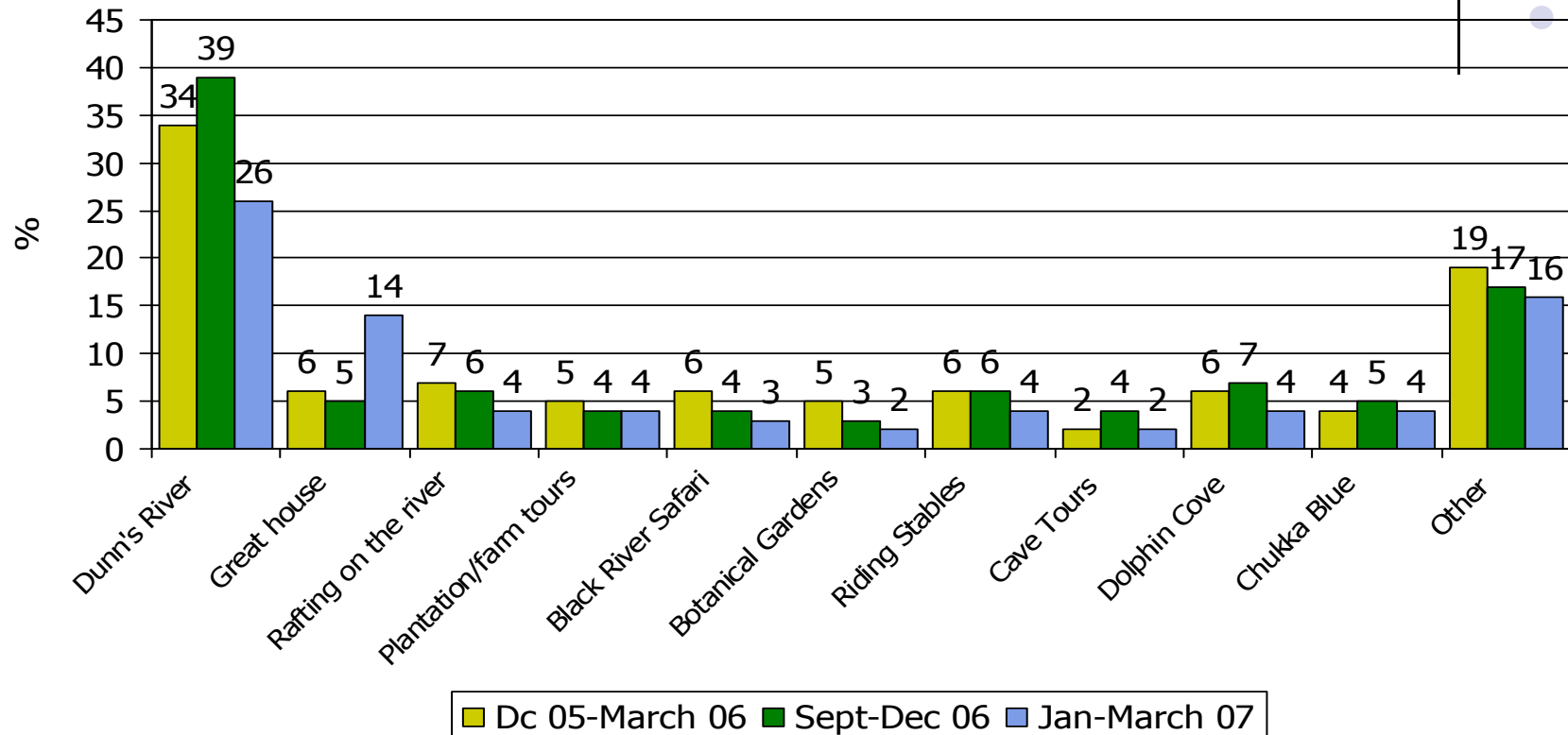


visited attractions  
46%

■ visited attractions ■ did not visit any attractions

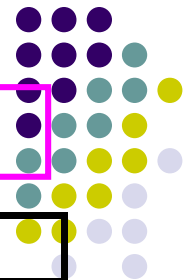
- Close to 50% of the persons who visited Jamaica, January- March 07 visited an attraction. Over 50% indicated that they did not visit an attraction.

## Incidence of visiting the following attractions



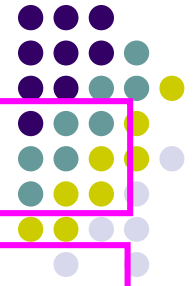
Those who visited an attraction were asked to indicate the attraction. The highest number (26%) indicated that they visited Dunn's River. This is a decrease in the number of persons who went there in previous survey period. The next highest number indicated that they visited the Great House. This is an increase in attendance from the previous survey period.

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



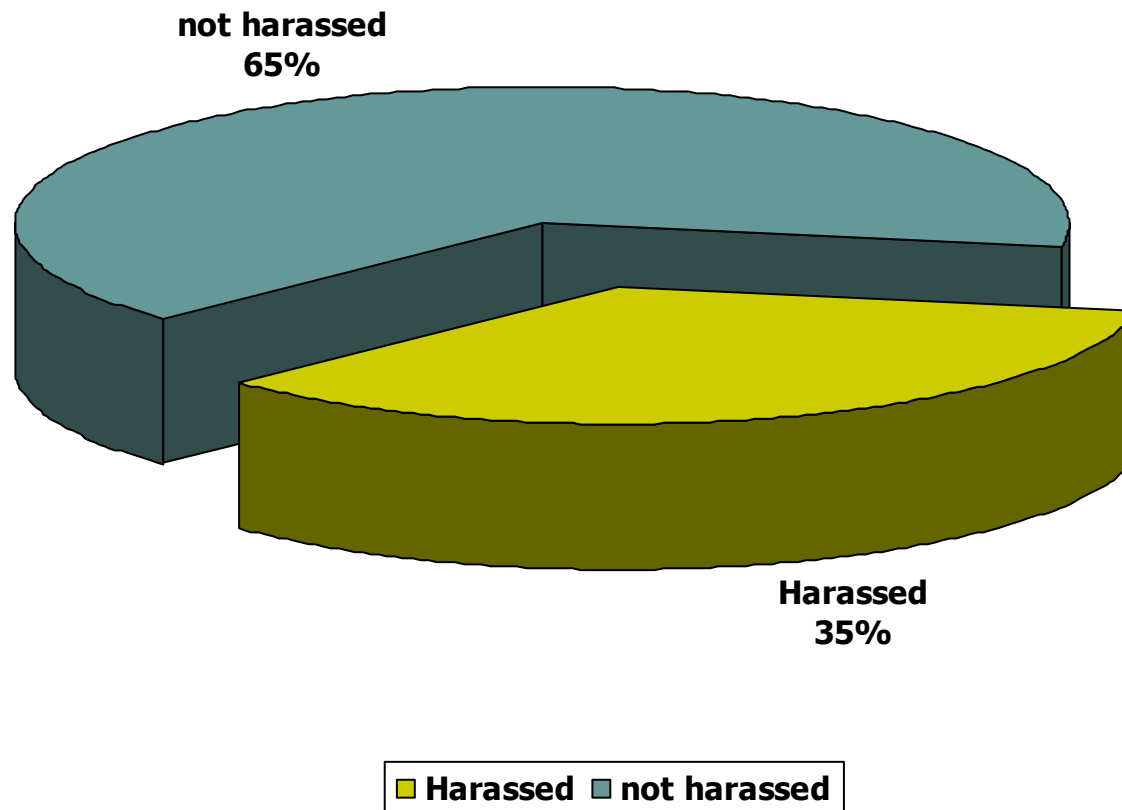
Attraction	Rating				
	Excellent	Good	Fair	Poor	Needs improvement
	%	%	%	%	%
Dunn's River	68	26	5	1	1
Great House Tours	50	38	7	2	2
Rafting on the River	66	28	2	1	1
Plantation Tours	55	39	5	0	0
Take Black River Safari	53	30	10	5	0
Botanical Gardens	63	29	4	0	2
Riding Stables	65	29	5	0	0
Cave Tours	64	23	9	0	2
Dolphin Cove	69	23	6	1	1
Chukka Blue	76	23	0	0	0
Other places	72	17	8	1	2

All the attractions were given an excellent rating by over 50% of the respondents.

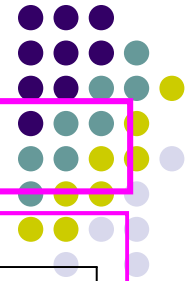


## Harassed during stay

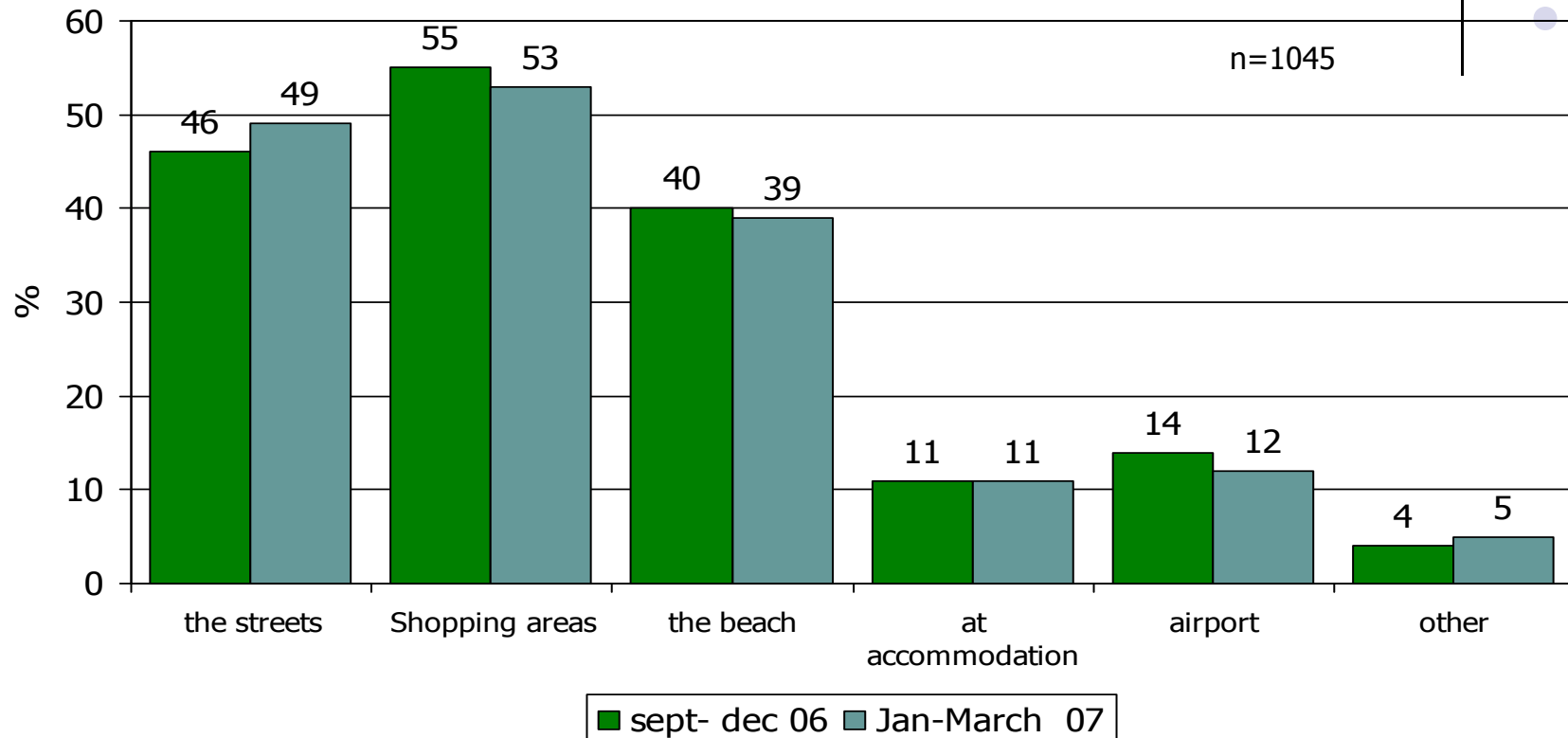
n=2974



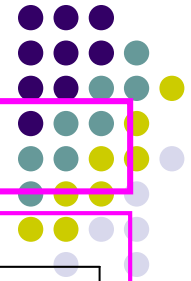
35% of the respondents indicated that they were harassed during their stay in Jamaica.



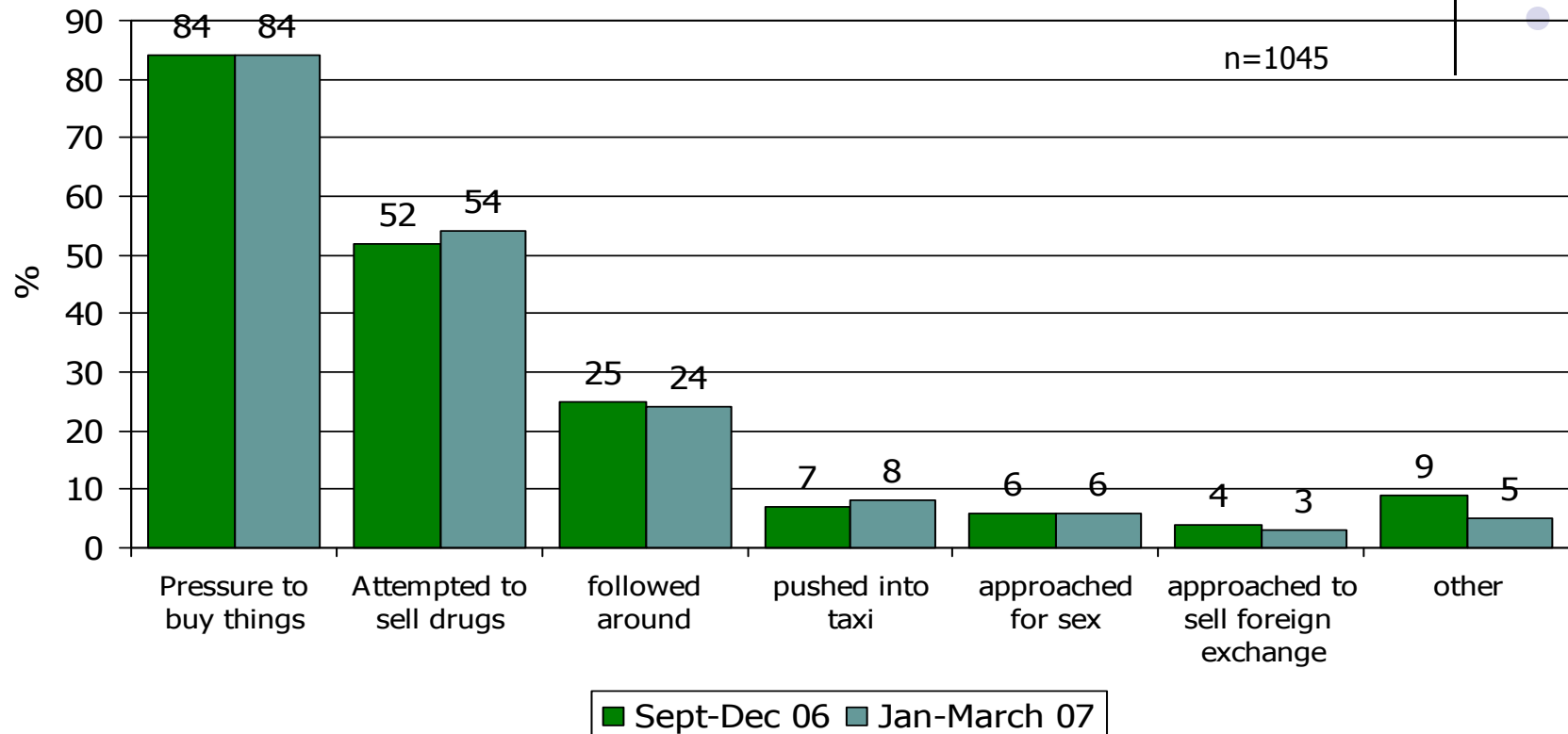
## Places where harassment took place



Those who were harassed were asked to state where the harassment took place. Over 50% stated that it took place in shopping areas. Close to 50% indicated that it took place on the streets. It should be noted that some person were harassed at more than one location.

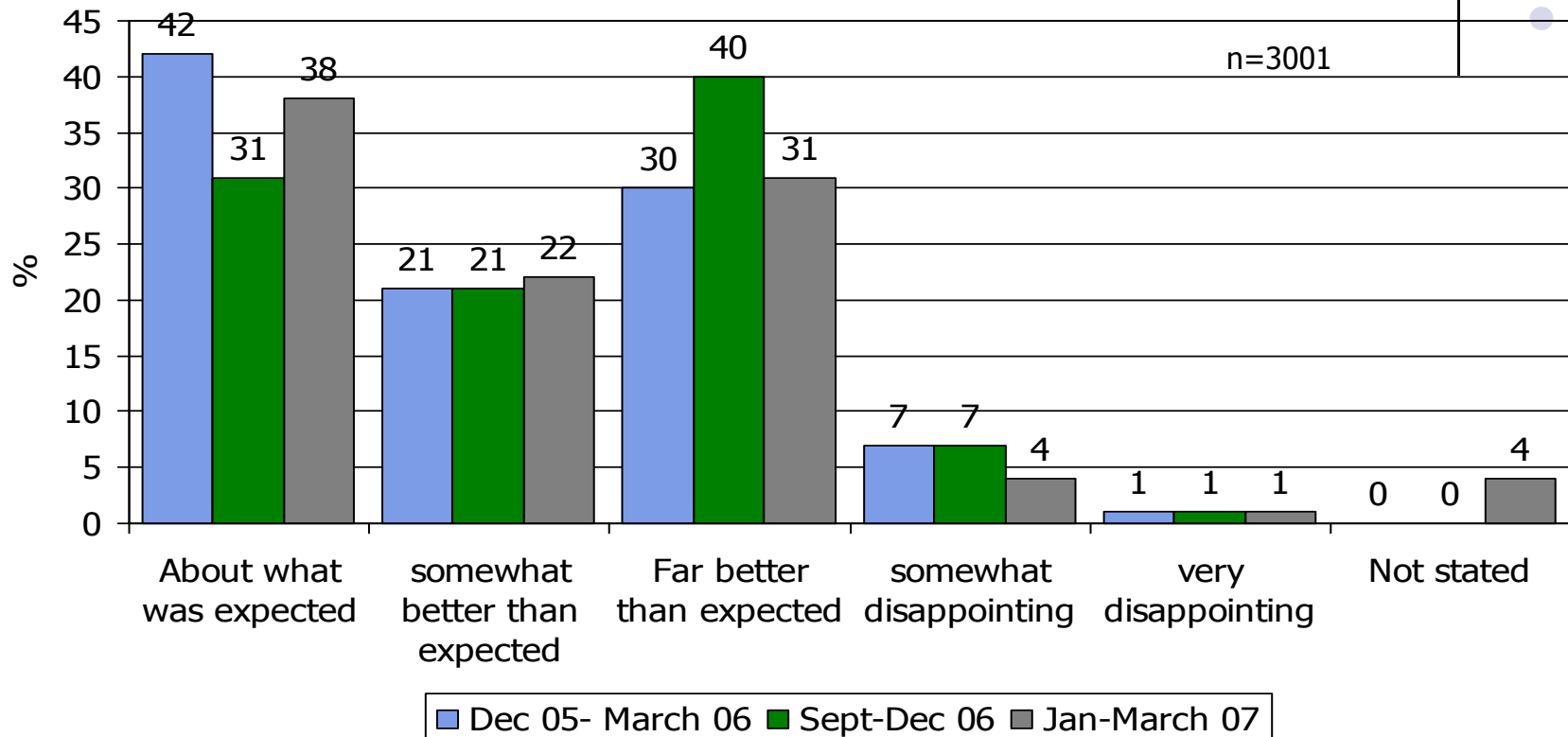


## Types of harassment



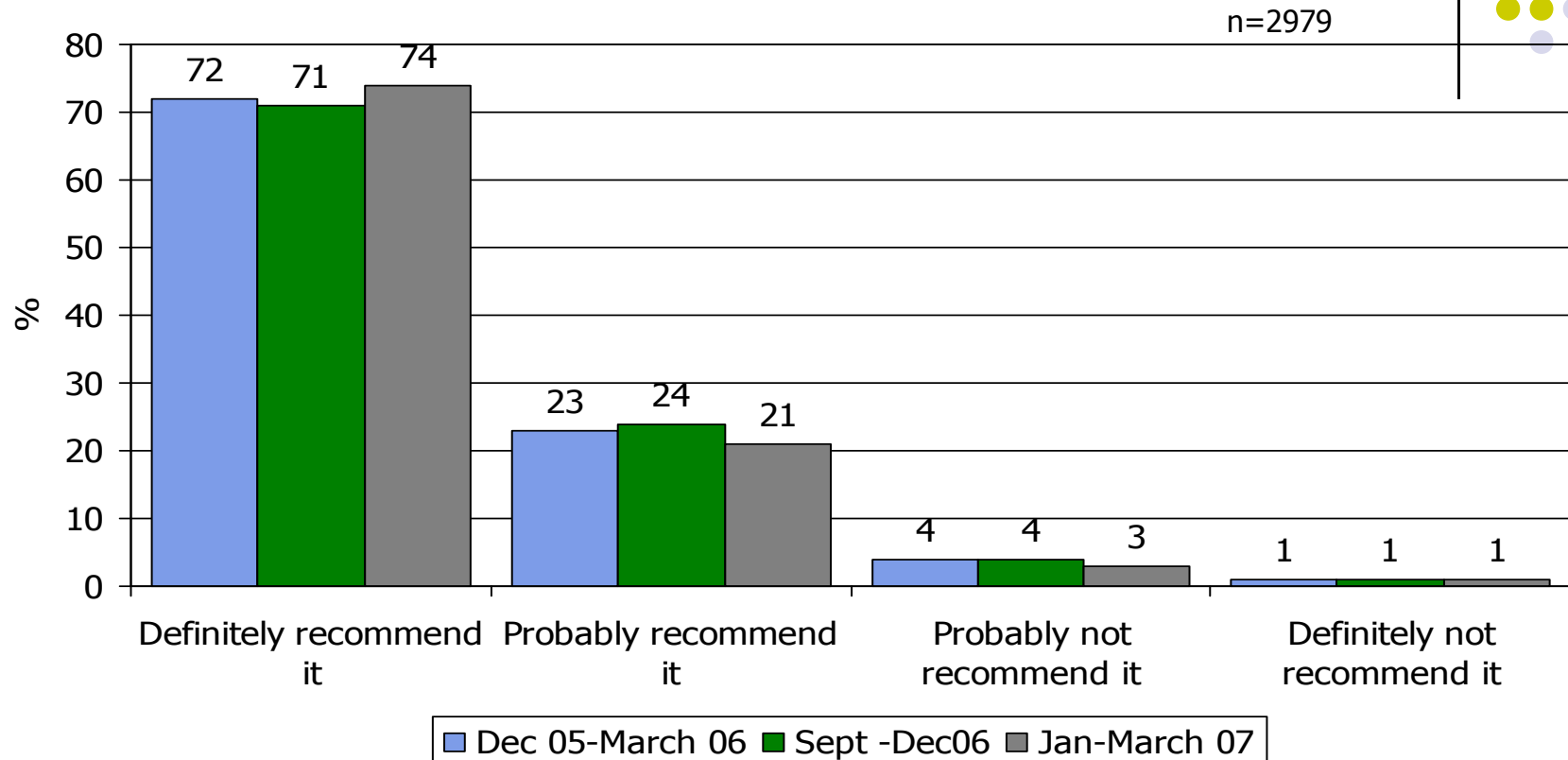
An overwhelming majority (84%) stated that they were pressured to buy things. The next highest number stated that they were approached to buy drugs.

## How was your visit compared with your expectations?



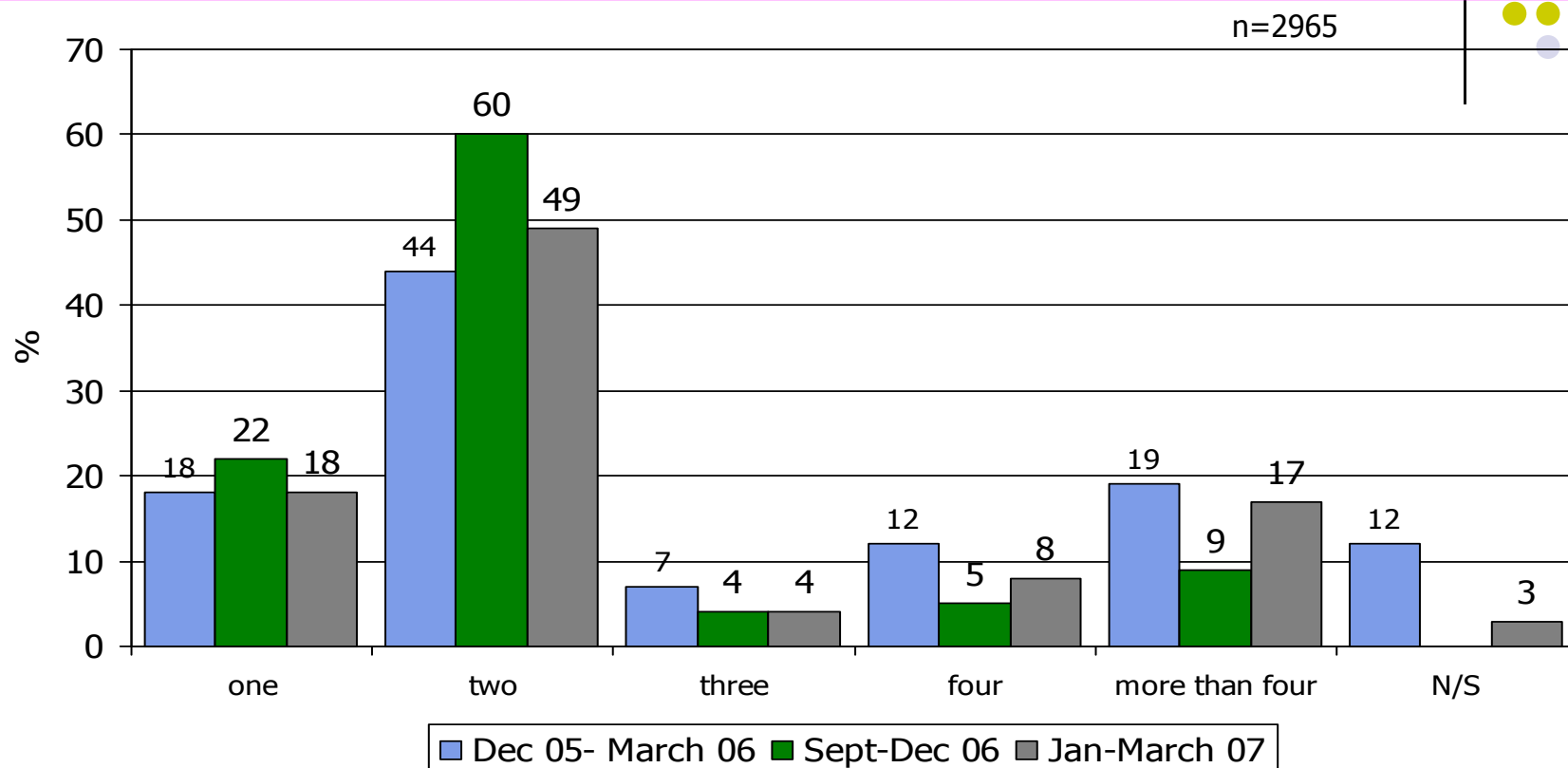
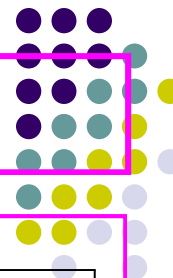
The visitor were asked to state how their visit was compared to their expectation. A significant number (38%) indicated that their visit was 'about what was expected'.

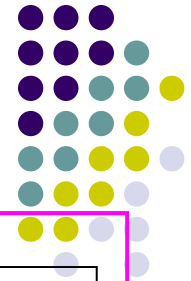
## How likely would you be to recommend Jamaica to your friends?



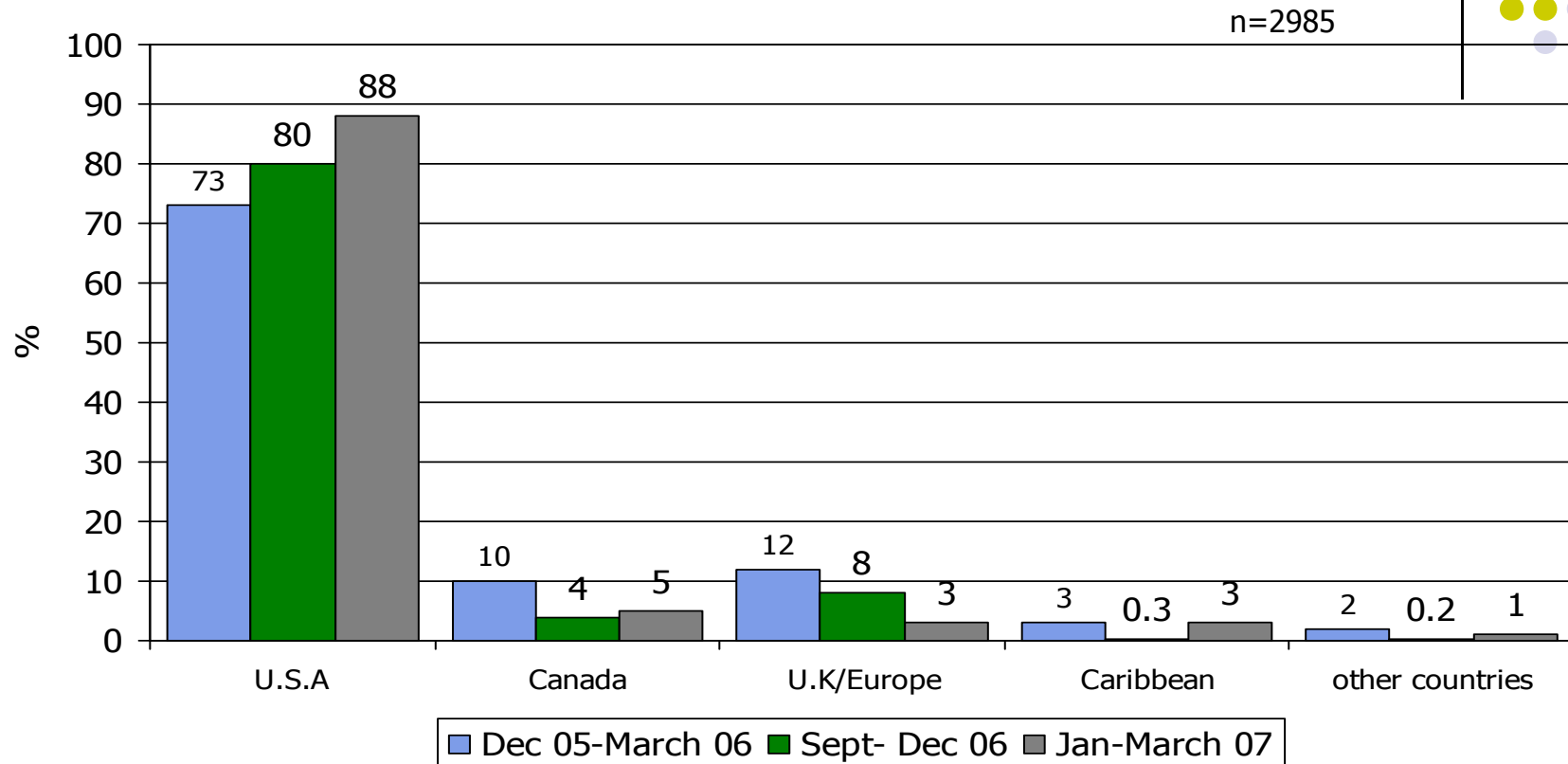
Almost all (74%) of the respondents stated that they would definitely recommend Jamaica to friends and family.

## How many persons in the party

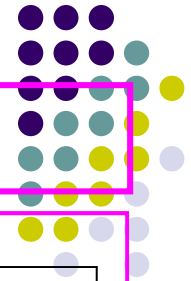




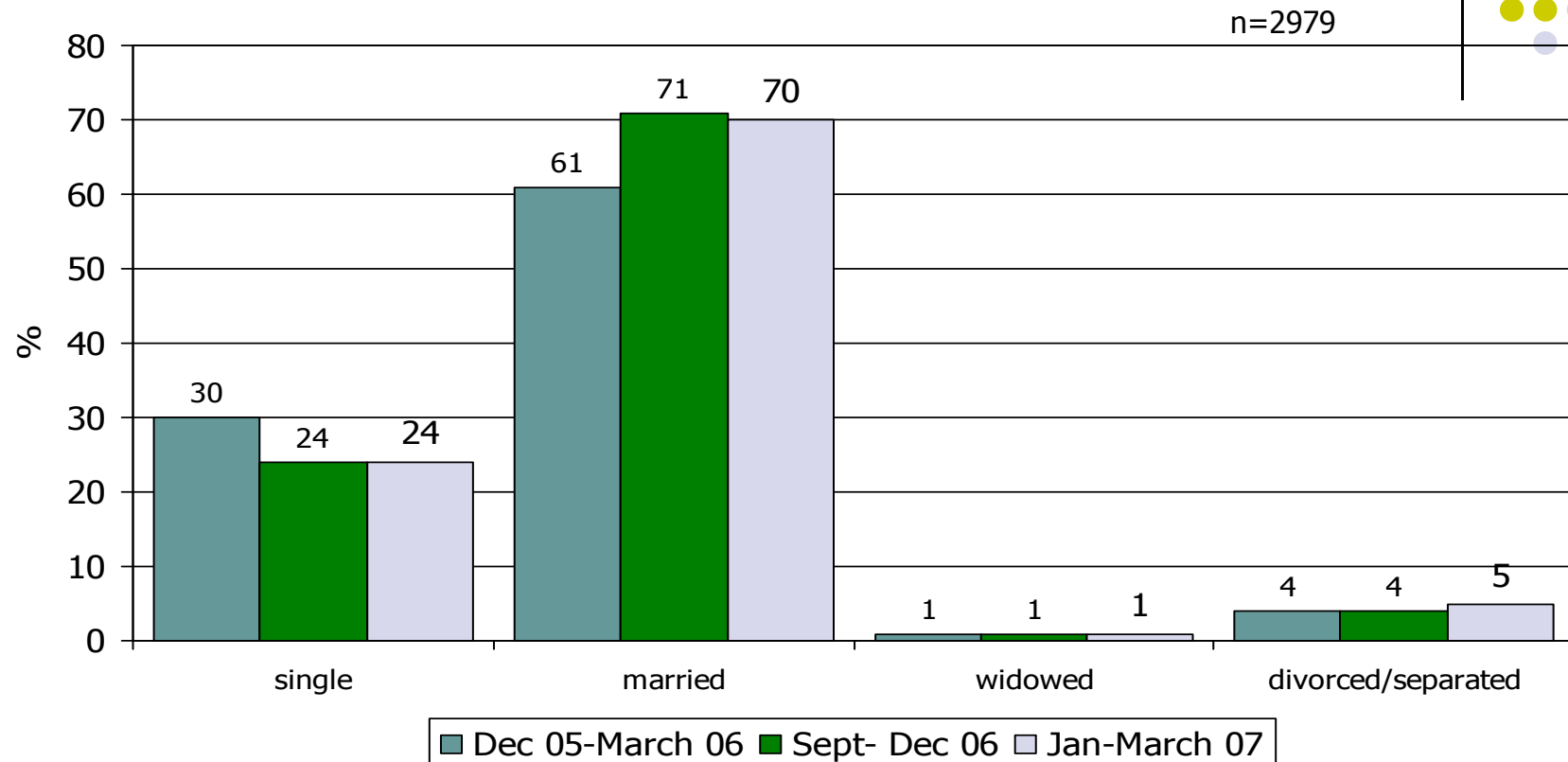
## Country of residence



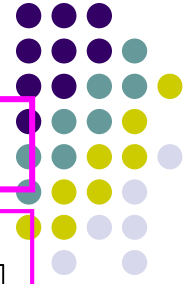
There is an increase in the number of visitors from the USA.



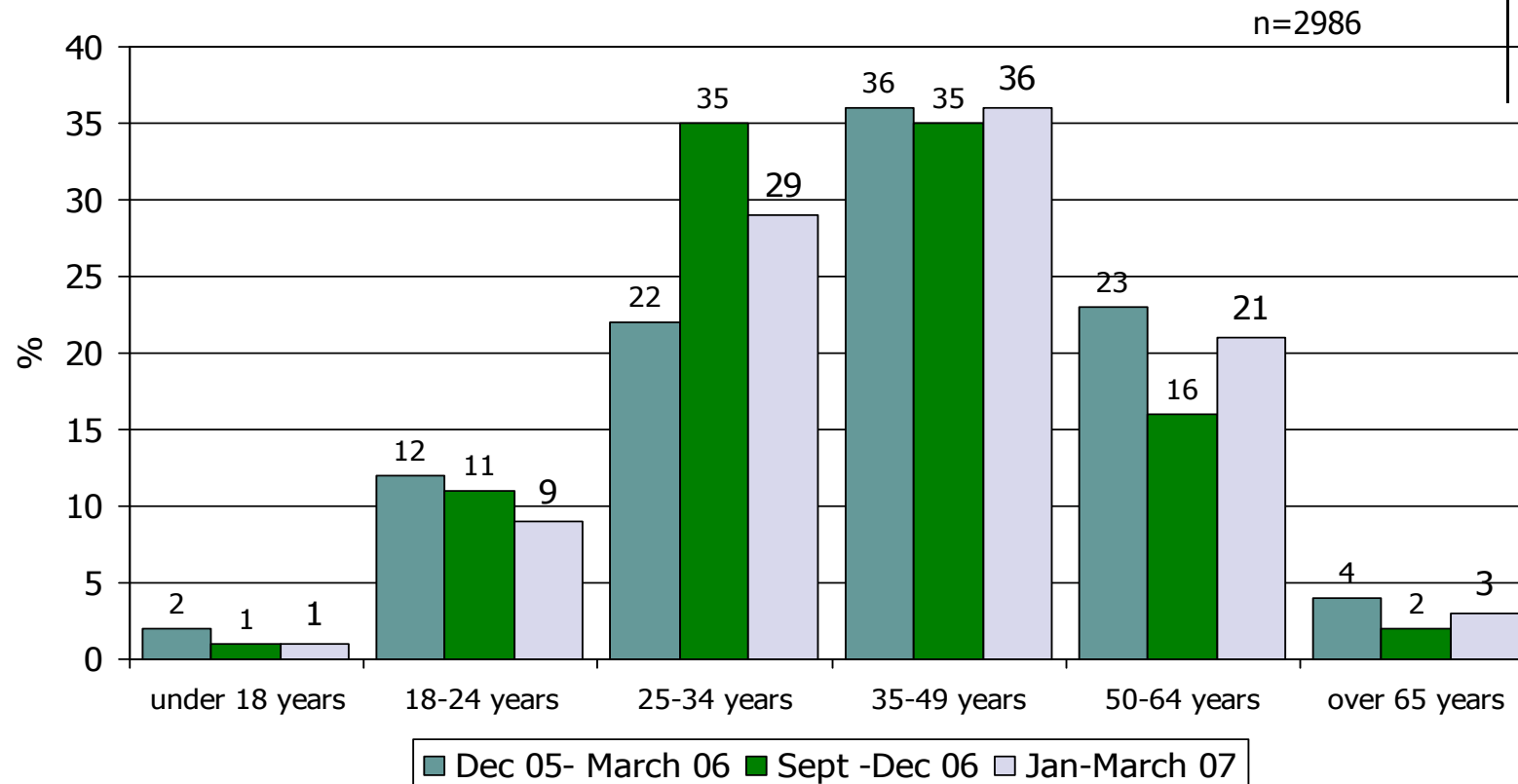
## Marital status



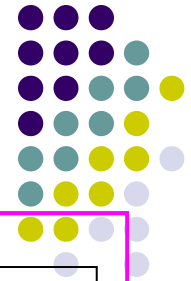
The majority (70%) of the visitors who visited were married.



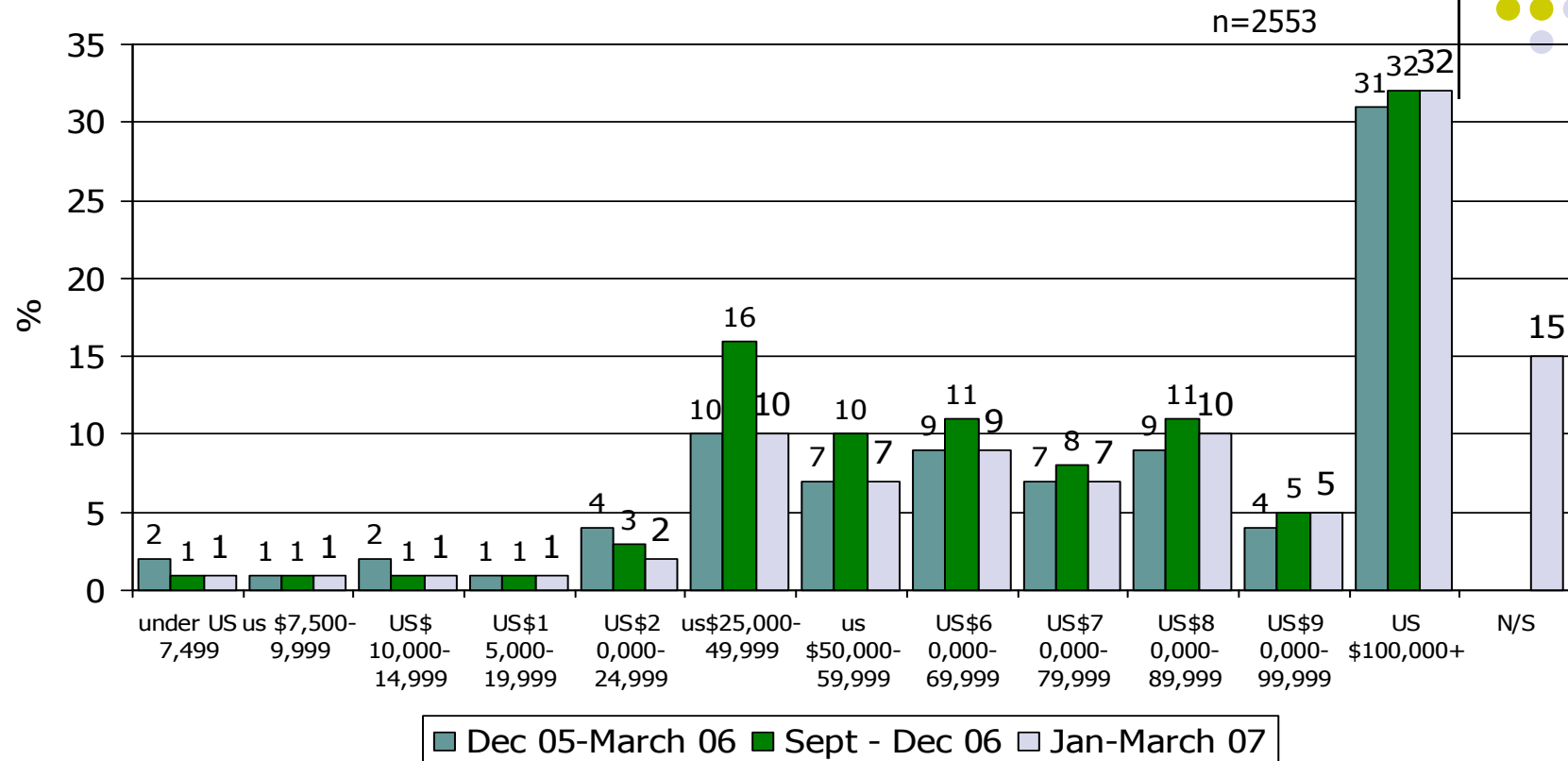
## Age group



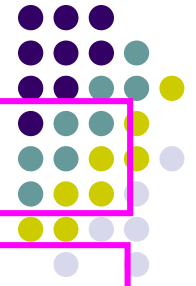
The highest percentage of the visitors were found in the age group 35-49 years.



## Annual Household Income before taxes

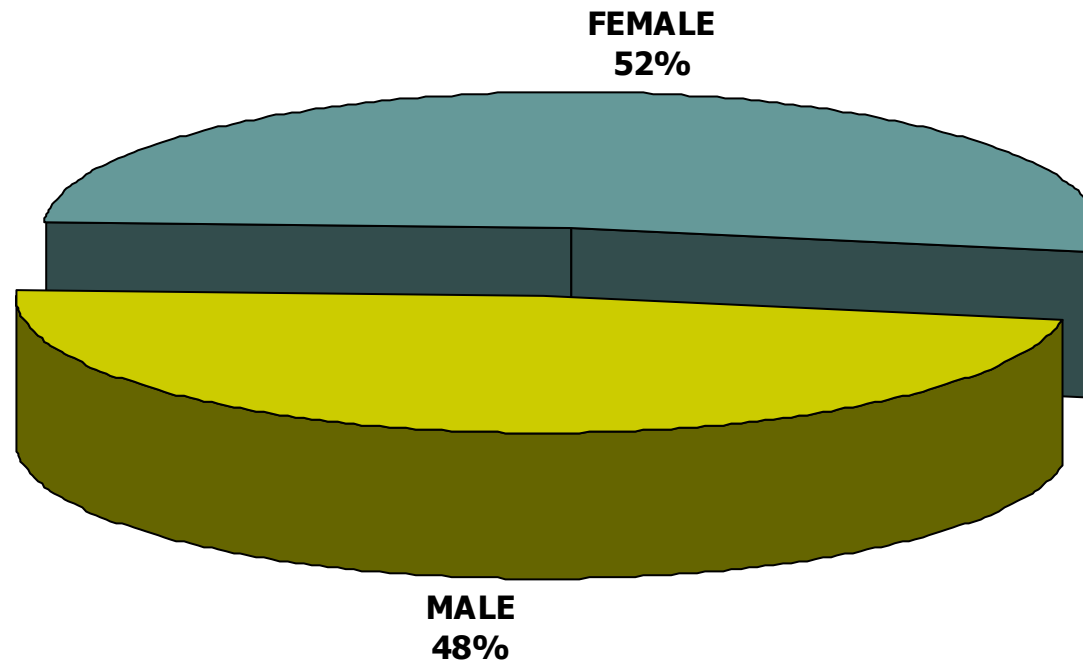


The highest number of the visitors (32%) indicated that they earned US \$100,000 and over.



## Gender

n=2938



There were more female than male visitors. This was the same for the last half of 2006.

## Thoughts of Jamaica being a quality destination with regards to the following



Characteristics	Rating			
	Very Poor	Poor	Good	Very Good
<b>Visitor attractions</b>				
Range and number	1	3	51	45
Quality of service	1	3	39	57
Value for money	1	7	49	42
Accessibility	1	8	50	42
Opening times	1	4	54	42
<b>Places to eat and drink</b>				
Range and number	2	8	54	36
Quality of service	1	4	42	53
Value for money	1	8	47	44
Opening times/ food service times	1	5	47	47
Menu choices	1	6	49	45
<b>Shops</b>				
Range and number	2	8	54	36
Quality of service	1	9	54	36
Value for money	2	12	54	32
Accessibility	1	7	55	37
Opening times	1	6	59	34

# Thoughts of Jamaica being a quality destination with regards to the following



Characteristics	Rating			
	Very Poor	Poor	Good	Very Good
<b>Ease of finding your way around</b>				
Road signs	6	25	45	24
Pedestrian signs	6	25	45	24
Display maps and information board	6	24	44	26
<b>Cleanliness</b>				
Countryside	7	28	41	24
Towns	8	38	38	16
Beaches	2	8	40	50
Attractions	2	7	47	44
<b>Tourist information or other type of visitor centre</b>				
Welcome	2	6	48	45
Speed of service	2	9	49	40
Helpfulness of information provided	2	6	48	44
Accessibility	1	6	51	42
<b>Accommodation</b>				
Range	1	3	41	56
Quality of service	1	4	35	60
Value for money	2	5	41	52
Accessibility	1	4	42	53
Opening times	1	3	42	55