

JAMAICA
TOURIST BOARD
ANNUAL REPORT



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OF THE

JAMAICA TOURIST BOARD

APRIL 2013 – MARCH 2014

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 2013 – MARCH 2014**

JAMAICA TOURIST BOARD

BOARD OF DIRECTORS

APRIL 1, 2013 – MARCH 31, 2014

Mr. Dennis Morrison	-	Chairman of the Board
Mr. John Lynch	-	Director of Tourism
Mrs. Evelyn Smith	-	President of the Jamaica Hotel & Tourist Association
Mr. Wayne Cummings	-	Hotelier, Sandals Resort International
Mr. Paul Pennicook	-	President, International Lifestyles Inc. and Executive of SuperClubs Resorts
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
Mrs. Pamela McLaren **	-	Ministry of Finance Representative

**** Mrs. Pamela McLaren resigned as a Resource Person to the Board effective October 1, 2013.**

INTRODUCTION / OVERVIEW

This past year has been quite challenging, but it culminated with a record as, for the first time, the destination welcomed over 2 million stopover visitors in a calendar year. This represented a 1.1 percent increase over 2012.

Last year's theme was "Keeping the Commitment", as the JTB worked with its industry partners to advance Jamaica's position as a global destination, and the results clearly showed the positive outcome of this commitment.

The aim this year was to harness that spirit of commitment to make it work harder for us as a destination. This year's theme therefore was "The Power of Partnership" - working towards our common goal **together** for even greater success.

The world's economy has changed, and there continues to be even more competition in the tourism sector. We're not simply competing with our neighbours in the Caribbean region...we're up against U.S. cities and states as well as other exotic or cosmopolitan locations around the world. A focus on strategic partnerships has become increasingly more important.

Market trends show that travellers are demanding more authenticity when experiencing a destination. To be relevant to today's traveller, we must align ourselves in proper partnership to not just meet their needs, but to surpass their expectations. We all – the JTB, hoteliers, attraction and transportation operators – have a common goal, and that is to ensure a world-class vacation experience for our visitors.

2013 was a banner year for Jamaica as a destination and we could not have achieved this had it not been for the collaboration and support of our valued partners.

Once again, destination Jamaica surpassed the 3 million mark for total visitor arrivals. While cruise passenger arrivals declined by 4.2 percent, the island's stopover arrivals saw marginal growth of just over 1 percent.

From our primary source market, the United States, Jamaica experienced a modest 1.1 percent increase in stopover arrivals, while arrivals from Canada decreased by 1 percent. However, arrivals from UK and Europe saw an increase of six percent. Asia saw an increase of just under seven percent while Latin America experienced a huge increase of 22 percent.

For 2013, Jamaica's cruise ship arrivals were down 4.2 per cent over 2012, with the tourism capital, Montego Bay, feeling the brunt of the fallout. Of the 1.2 million cruise passengers visiting our shores between January and December, the majority of them disembarked at the Historic Falmouth Port.

- Historic Falmouth Cruise Port welcomed 587,000 passengers from 135 cruise ship calls, an increase of over 10 percent;
- Ocho Rios was down by 3.2 percent, receiving just over 380,000 passengers from 120 calls;
- Montego Bay was down by 29.8 percent, receiving nearly 238, 000 passengers from 86 calls.

The decline in cruise arrivals continued through January and February 2014. But the numbers for March showed that we had turned the corner – we ended flat at 0.8%. And April's numbers showed a complete reversal with an increase of 44.8% over April 2013. This means that for January to April, cruise arrivals were up by 3.6%. All indications were that this growth trend would continue.

International tourist arrivals reflected an increase in 2013. According to the UNWTO, global arrivals grew by 5 percent. Tourism Consulting Group IPK International anticipates a similar growth path for 2014.

Within the Caribbean ... In 2013, the region welcomed a total of 25 million stop-over visitors, a modest growth of 1.8 percent in arrivals. This was a growth rate that lagged well behind most other world regions. In comparison, 2013 tourist arrivals grew 3.6% in all of the Americas, 5.4% in Europe, 5.6% in Africa and 6% in Asia and the Pacific, according to the UNWTO.

The UK/Europe market continued to see a resurgence. Following a five-year decline of that market, we were encouraged by the growth which was complemented by increased flights between the UK and the island by Virgin Atlantic Airlines, British Airways, Thomas Cook and TUI.

We continued to work toward an integrated marketing programme so that sales, advertising and PR supported each other. In addition to our traditional public relations activities which included press trips and promotions, our efforts at maintaining contact with the travel trade and valued travel agents had been stepped up. Social media and online activity were also amplified.

For the period under review, we hosted more than 20 publications on press trips which generated press coverage in the region of £1.8 million, a feat we could not have achieved without industry partnership.

The Clipper Round the World Yacht race set sail from London in September. This is the longest ocean race in the world and provides a unique platform to showcase Jamaica in some key locations around the world. By the end of March 2014 The *Jamaica Get All Right* yacht had already been to France, Brazil, Australia, Singapore, China, San Francisco in the U.S.A., and Panama.

In Continental Europe, there was an overall increase in arrivals. However, there were mixed results with some primary markets still showing decreases due to the harsh economic climate. Russia and France, with direct flights to the island, were major growth markets from the region. Spain, Portugal and Italy continue to face a challenge. In Spain and Portugal, our main operator with summer charter to Jamaica was Soltour, and during a special reception in Madrid during FITUR we said thank you to over 100 of their specially invited guests

We participated in more than 25 trade and consumer shows during the year under review and will continue to do so in the coming year

We undertook coop activities with Biblio Globus in taking Jamaica to the wider Russian population.

In Japan, we focused on strengthening the relationship with travel wholesalers and increasing visibility through the media. We experienced a 4% increase in the number of visitors to Jamaica from Japan in 2013. In fact, with 2014 being the fiftieth anniversary of diplomatic relations between both countries, various kinds of promotions and events were being planned in order to draw more attention to Jamaica and to increase Japanese tourists to the island. Music and sports are two areas of focus for us in this market:

In China, our marketing and promotional efforts continued to raise awareness of destination Jamaica. We targeted the corporate and incentive travel market as well as the high end leisure market. Jamaica is viewed as the premier Caribbean destination for Chinese visitors coming to invest and do business. This presents us with excellent opportunities to increase arrivals from this growing market.

To highlight a few of the opportunities:

- The approval for the waiver of visa requirements for Chinese nationals wanting to visit Jamaica provides tremendous opportunities for us to market the destination. Persons will no longer need to go to the embassy in Beijing to secure their visa, which makes Jamaica much more accessible.
- Growing interest of Chinese investors in Jamaica or coming to find business partners as well as to attend relevant conferences or merely enjoy incentive travel to Jamaica. The Jamaican embassy in China advises that currently 80% of the visas issued in that embassy are for persons wanting to invest or do business in Jamaica.
- Increased airlift as a result of USA effecting the ADS agreement with China and airlines such as Aero Mexico starting direct flights to and from China, making it easier for Chinese visitors to come to visit Jamaica
- Fast growing outbound travel market of China with up to 100 million Chinese reported to have the means to travel overseas
- Special interest travel from the luxury market especially certain discerning Chinese wishing to visit exotic destinations for golf or honeymoons.

In China, Jamaica continues to enjoy high visibility through participation in all relevant travel exhibitions such as:

- China International Travel Mart 2013 in Shanghai
- China Outbound Travel & Tourism Market 2014 in Beijing, and
- World Travel Fair 2014 in Shanghai

Work continued in **the Indian market** as we sought to grow arrivals. With India being home to the fifth largest group of billionaires in the world, we have sought to position Jamaica as a high-end niche destination. Jamaica's key markets are Mumbai and Delhi.

India is one of the biggest and the most important outbound travel markets in the world. The outbound travelers are high spenders with an average spending of \$1700 per trip. The growing trend from this market is that more and more travelers want unique and individually catered travel experiences. Cricket continues to be a pull factor for the Indian market.

During the period under review, we pursued a media strategy, securing coverage in a number of top Indian publications. Among them, *Economic Times Travel*, the Travel Supplement of India's leading English Financial Daily; *DNA After Hours*, India's leading English Daily Broadsheet;

and *Air India Magazine*, the in-flight magazine of India's national carrier. The value of the coverage generated during the period is estimated at over one million US dollars.

As part of our **global advertising strategy**, our advertising tag line underwent a change, from **"Jamaica - Once You Go, You Know"** to **"Jamaica, Get All Right"**. This was a major project for the JTB in 2013. The thinking behind this was – we have brought the current generation of travelers to Jamaica, now it's time to bring the next generation. Our mission was to evolve Jamaica from a brand people *know*, to a brand that they *feel*. The strategy: Jamaica. The Home of All Right. *All right* is the unique vibe that feeds a world need. The only place to get it is in Jamaica.

In the U.S.A., similar to our global strategy, we continued to focus on initiatives that directly targeted consumers and trade professionals. Over the past year, we organized sales calls, fam trips, webinars, seminars and training of reservation agents, combining public relations and promotions into many of our sales activities.

Over 550,000 consumers experienced Jamaica's tourism product through music, food and literature distribution at 86 events. With the launch of the new advertising campaign, the new tagline **"Jamaica, Get All Right"** was used to support the proposition that Jamaica is **THE** place to visit and to be seen.

The Jamaica Travel Specialist training programme continued to be the main focus of the working relationship between the US and Canadian sales teams and the travel agent community. Incentives and rewards were put in place, with the launch of the Jamaica Travel Specialist Online Store taking place in March 2013. Continued efforts will be made to increase the number of supplier partners involved with the programme. At the end of April 2014, there were over 11,000 graduates of the programme.

The travel agent community continues to play an important role in our sales efforts. During the past year we continued to engage agents, hosting a variety of activities in the United States:

- Between September 2013 and March 2014, we conducted a series of seminars and joint sales calls with supplier partners visiting more than thirteen hundred agencies. We hosted product dinner presentations for over two thousand travel agents.
- Over 3,000 reservation agents in 60 cities were trained on how to effectively sell Jamaica's tourism product.

- More than 18,000 agents and consumers were reached through a total of 110 trade shows.
- We hosted over 450 agents on 36 separate fam tours.

Jamaica continues to be a great choice for incentive travel, as a result of our location and available airlift. Given the significant investment in our product, we continued to pursue an aggressive strategy in the **Groups and Conventions market**, including participation in a number of meeting and incentive trade shows.

Just north of the border in **Canada**, we continued the focus on engaging consumers and the travel trade. Similarly, in Canada, we placed significant emphasis on the use of social media. Co-op plans with Canadian tour operators were implemented.

Canada produced 18 of the 50 top selling agents in the Jamaica Travel Specialist programme for 2013. JTB participated in over 70 travel shows, interacting with almost 19,000 retail travel professionals. We hosted 285 agents on 18 fam tours and maintain a virtual fam tour group on Facebook.

Our consumer direct activities had us participating in 50 consumer shows, exposing about 1.2 million Canadian consumers to the Jamaican tourism product. This number includes over 70,000 brides to be, and 20,000 members of the Diaspora. Additionally, we mounted several consumer promotions across social media platforms reaching over 2 million consumers.

We will continue to take advantage of social media to increase Business to Consumers and Business to Business impressions.

While North America remains our “bread and butter”, another area of focus for us is the burgeoning **Latin American** market. Throughout the past year, there has been a renewed focus as we sought to grow arrivals from this region.

Jamaica has had a presence at major travel shows including WTM Latin America in Brazil, Fitur in Colombia and others. We've also hosted media on individual and group press trips from Brazil, Colombia, Argentina, Chile, and Mexico.

The United States continues to be our primary source market, followed by Canada and the UK. We continued to rely on the power of **public relations** to increase awareness about Jamaica and to expand our visitor base.

Between July 2013 and April 2014, public relations outreach generated more than 1 billion media impressions in the US, 60 million in Canada, and 97 million in Latin America. Over that same period, we hosted a variety of individual and group press trips targeting print and broadcast journalists as well as bloggers, giving them an opportunity to experience firsthand the island's diverse offerings.

The JTB has used **promotions** as one of its many successful strategies to garner impressions in key markets globally. These tactics have been geared toward consumers in an effort to achieve maximum return on investment.

Jamaica's participation in the 2014 Winter Olympics in Sochi demonstrated the power of partnership. In addition to the great outpouring of financial support for the Jamaica Bobsled team, non-Jamaicans from around the world cheered for our team, as if they were their home country's bobsled team.

Jamaica's participation in the Sochi Olympics gave us a wonderful opportunity to show collaboration between our Advertising and Public Relations teams. FCB produced a music video which created quite a stir.

To maximize the marketing value of the Jamaica Bobsled team's popularity, we hosted a Twitter chat between the team and its old and new fan base. The chat was a huge success reaching an estimated 5 million people. The team's popularity could be seen in the media coverage they generated.

Our public relations and advertising teams again collaborated on the launch of the new advertising campaign. We used a variety of strategies to convey our messaging to each target audience. We incorporated the new tagline as part of a digital and social media campaign, executing a real-time photo stream on Facebook. The campaign collected photos from tweets and Instagram uploads gaining over 1,500 new Facebook page likes and reaching over 350,000 people.

We have made significant strides in promoting Jamaica's rich Jewish heritage, as work continues on the development of the Jewish product. Last year, we hosted top Jewish media from the United States to experience firsthand the destination's offering. To date, these placements have garnered over 22 million in audience reach.

Jamaicans Overseas also continued to be a key target audience. We worked closely with Diaspora partners to target 2nd and 3rd generation Jamaicans to visit and explore our tourism offerings. In Canada, we participated in several initiatives reaching over 20,000 Diaspora members across the country.

Here at home, the Experience Jamaica Campaign continued to be a flagship programme. The success of this programme is very dependent on strong partnerships with all of our partners.

Over the past year, the destination has continued to receive significant awards, some of which were:

- The Jamaica Tourist Board (JTB) was recognized by the Hospitality Sales & Marketing Association International (HSMIA) with a Gold Adrian Award for public relations excellence for its entry in the television category *Revisiting Our Roots* featuring TODAY Show co-hosts Jenna Wolfe and Lester Holt.
- For the eighth year in a row, the Jamaica Tourist Board's Canadian operations were honoured with the coveted Agents' Choice Award for the Favourite Tourist Board in Canada. Through these same awards, travel agents collectively recognized Jamaica as the Favourite Honeymoon Destination for the fifth consecutive year.
- Jamaica also won the Excellencias Award in Spain for its work in emerging markets, especially in Russia and Europe.
- Jamaica continues to do well in the World Travel Awards. For the 8th year running, we have been honoured as the Caribbean's Leading Tourist Board, and this is our 7th year as the Caribbean's Leading Cruise Destination. For 2013, we were declared the World's Leading Cruise Destination as well as the Caribbean's Leading Destination, among others.

For calendar year 2013:

- Total stopover arrivals of 2,008,409 increased by 1.1%
- Cruise passenger arrivals of 1,265,268 decreased by 4.2%
- Gross foreign exchange earnings estimated at US\$2.113 billion, an increase of 2.1%.
- The average hotel room occupancy rate was about 67.9%.
- Total capacity in the accommodation sub-sector stood at 32,150 rooms, of which 20,359 were in hotels and another 6,480 in villas, guesthouses and apartments. A further 5,311 rooms were in closed properties.

ADVERTISING ACTIVITIES WORLDWIDE

First appointed in March 1990, **DraftFCB** was again appointed in 2004 after a tender process conducted in accordance with the Government's procurement requirements. In response to a submission by the JTB/Ministry of Tourism, Cabinet gave approval for the extension of this contract for a further two-year period, May 2009 – April 2011. This was followed by two further extensions to March 2012 to facilitate completion of the tender exercise which began in 2011.

At the completion of this procurement exercise, DraftFCB was awarded the contract for the five-year period April 2012 to March 2017. The agency changed its name to **FCB Garfinkel** during 2013. FCB Garfinkel therefore remained the advertising agency of record for the Jamaica Tourist Board on a worldwide basis during the period under review.

This summarizes FCB advertising activities on behalf of the Jamaica Tourist Board for FY 2013/2014 in the United States, Canada and United Kingdom.

This past year marked the launch of our new advertising campaign, *Get All Right*, which had a 360 degree presence across multiple advertising mediums. We amplified our messaging through new and innovative ways, such as a significant campaign launch event in Times Square which created buzz among the consumer and the trade; as well as the viral video sensation, "Bobsled Song", in response to the newsworthy Jamaica Bobsled team at the 2014 Sochi Winter Olympics.

New Campaign Launch: *Get All Right*

On April 8th, 2013, Board approval was received to proceed with the *Get All Right* campaign production. The campaign portrays Jamaica beyond just seeing the island, to actually *feeling* it; lifting Jamaica from a top-tier Caribbean destination, to a preferred destination on the global stage.

The FCB team traveled to Jamaica the week of April 29th and shot several locations all over the island. We traveled from Montego Bay, to Negril, to Ocho Rios and then over the Blue Mountains to Kingston, capturing the vibe of the island through both video and still photography; bringing the *Get All Right* campaign to life.

The campaign launched on October 21st, 2013 and rolled-out through the following channels:

- TV
- Print
- Taxi Tops
- Online video
- Digital banners
- Website redesign
- Desk calendar
- Mobile/tablet
- Social media
- Co-op
- Paid search
- Events

FCB Garfinkel developed a holistic style guide which covered off on all design aspects of the new campaign. The style guide was presented and approved by the JTB and was distributed, along with logo and design file assets, to all co-op partners as well as the UK and Toronto offices.

UNITED STATES

Campaign Launch Event

To kick-off the campaign, FCB Garfinkel executed a publicized launch event in New York City's Times Square. The goal was to spread the message of the new campaign and bring the *Get All Right* mood to New York, one of the most stressful cities in the world, by building the world's largest stress ball in the middle of Times Square.

The event consisted of a 12-hour production centered around a 24-ft. giant stress ball, constructed in the center of Times Square. We created mini stress balls to hand out to the crowd to provide a takeaway of our message. The event was a success, drawing large crowds throughout the day and generating substantial "buzz" on social media. On the day of the event, the Jamaica Facebook page received 1,048 page likes, a 3,400% increase from the daily average. Facebook impressions increased by 423% compared to the average daily rate.

In addition, we worked with VP Records to secure DJ and musical performances including a live performance from Gyptian, the number 1 Reggae artist, and engaged with Record Setters to

certify that the stress ball broke two world records; including the largest stress ball ever created and the most people squeezing a stress ball at the same time. We also secured media placement in *Metro* newspaper consisting of a full cover wrap, including inside front and back covers as well as a ¼ page insertion. Over 150 *Metro* newspaper distributors helped advertise the event by handing out the papers as well as driving subway riders to Times Square.

Television

The TV campaign launched on October 21st (:30) nationally with heavy-ups in New York, Chicago and Philadelphia; and ran through November 17th. The ads ran on channels such as CNN, ESPN, The Travel Channel and HGTV. After the holiday hiatus, we returned on-air January 6th through March 2nd. After another brief hiatus in March, we returned to air on April 21st and ran through May 18th, both nationally and with a heavy-up presence in New York and Philadelphia.

The JTB aligned with several key co-op partners to help drive bookings to the island across multiple major markets. Co-op partners included JetBlue, American Airlines Vacations, Delta Vacations, United Vacations, Southwest Vacations, Caribbean Airlines and US Airways Vacations.

Digital Activity/Social Activity

During 2013/2014, The JTB engaged in various digital co-ops and sponsorship programs to increase audience reach and extend the budget. Partnerships/sponsorships included: Orbitz, Travelocity, Expedia, WeddingWire, Funjet, Apple Vacations, Pandora, Living Social, Spirit Airlines, WAYN.com, Amex Vacations, Pleasant Holiday, Flight Centre, GOGO Vacations, Classic Vacations, BookIt, and Bridal Guide. The JTB also participated in a partnership with WNBC & NY Live for an on-air and online promotion valued at \$48k.

In conjunction with these co-ops and sponsorships, FCB Garfinkel developed digital banner ads in accordance with the integrated media strategy. There were a total of eleven creative executions which were either focused on overall brand messaging or targeted messaging such as weddings/honeymoons. The banners were optimized in real-time depending on performance. They ran on sites such as Trip Advisor, Expedia, USA Today, NBC News, Pandora, Brides as well as digital networks such as Travora and TribalFusion.

2014 Sochi Olympic Activation

FCB Garfinkel developed and executed “The Bobsled Song” activation to promote and support the Jamaican Bobsled Team at the 2014 Winter Olympics in Sochi. “The Bobsled Song” is a

catchy island groove that syncs perfectly with the twists and turns of Sochi's track. It was set to an 8-bit animated video emphasizing the Jamaican vibe.

Consumers were instructed to download the song to play while watching the live Bobsled race on the landing page, BobsledSong.com. Digital banners, Facebook Ads, Facebook posts on Jamaica's page, Twitter posts, and Instagram were used to capture engagement and drive consumers to the page.

The objective of this promotion was to leverage the publicity around the Olympics and enhance the viewer experience while promoting the vibe that makes Jamaica authentic. A challenge that we needed to overcome was the heavy regulations set by the International Olympic Committee (IOC). Any communication directly referencing the Olympics is regulated by the IOC. This made it difficult to create a promotion around the Jamaican Bobsled team, as direct references to Sochi, The Games, or anything similar was forbidden. FCB Garfinkel and the JTB were able to overcome these challenges through creative ingenuity.

The promotion was a huge success. We exceeded the short term goal to be a part of the Olympic conversation and drive high numbers of engagement including over 25,000 song downloads on the landing page, 1,200,000+ YouTube views, 33,500,000+ media impressions and approx. \$20,000,000 in unpaid media. Media coverage was outstanding including primetime coverage during NBC's live Olympic newscast, coverage on GMA and The Today Show, to name of few.

Out-of-Home Activity

To promote Delta's new non-stop service from Atlanta to Montego Bay and Kingston, we placed four billboards in the Atlanta area, running 9/2-9/29/13. As the billboards ran prior to the launch of the *Get All Right* campaign, the Jamaica brand logo and previous layout were utilized.

In Winter of 2014, we developed OOH in the form of Taxi Tops for the New York market. The creative was in-market 1/20/14 – 2/16/14, which coincided with the Super Bowl, taking place in New York (as well as Valentine's Day). Placement included 355 Taxi Tops in the NYC market, with a rotation of three different creative layouts (Golf, Beach and Doctor Bird), generating an estimated 110 million impressions.

In addition to traditional OOH activity, this year FCB also developed the 180-day *Around the World: Clipper Yacht* race design for the sailboat, uniform and invitation, representative of the new campaign branding.

Paid Search

The Paid Search campaign launched on 10/29/13 and continued into March 2014. The campaign utilized search engines Google, Bing and Yahoo. A total of 15,823,394 impressions and 208,407 clicks were delivered. This is the first time that Paid Search has run an always-on campaign to maintain brand awareness.

Print

Wedding, Golf, Bikini and Snorkel ads ran in the following publications following the launch of the new *Get All Right* campaign: *Brides Magazine*, *Jamaque*, *PGA Tour Guide*, *a Japanese Publication (creative was provided to Japan)*, *Recommend Magazine (Delta Airlines 2014 Caribbean Guide)*, *Travel Biz Directory*, "Three Little Birds" NYC playbill and *Healthy Aging*.

In December of 2013, Jamaica native, Tessanne, won first place in the American Reality talent show, *The Voice*. FCB utilized the *Get All Right* campaign look/feel to develop an ad congratulating Tessanne, which ran in two Jamaica publications, *The Gleaner* and *The Observer*.

Collateral

As in previous years, FCB Garfinkel designed and produced the 2014 Jamaica Desk Calendar, incorporating the new campaign look/feel. Calendars were produced in three different versions; US Generic, Canada and London; 300 versions were expedited to London for the World Trade Market. In total, 47,000 calendars were produced and shipped.

Design and production for updated Posters, Display Unit and Destination Guide in-progress during FY 2013/2014.

Metrics

In correlation with the new campaign, FCB Garfinkel began a quarterly reporting and analytical support for measuring the success of the advertising campaign. This reporting consists of the delivery of four quarterly reports: Q4 2013, Q1 2014, Q2 2014, Q3 2014, in which we synthesize data and present the findings to the JTB.

Reporting includes all aspects of the campaign, including performance for TV, digital, OOH, print, events and social activations. Presentations have been delivered for Q4 2013 and Q1 2014. FCB is currently compiling the data for Q2 2014, which will be presented during Q3.

Website

As part of the new campaign, FCB Garfinkel developed and launched a brand new version of VisitJamaica.com. The goal of this re-design was to evolve VisitJamaica.com to a site where consumers feel the spirit of Jamaica. To accomplish this, extensive research, including competitive analysis, was conducted to inform the strategy.

The new design enhances the user experience and aligns the *Get All Right* strategy throughout the digital platform. Since the launch of the new campaign, website visits have jumped from 174K in Q4 2012, to 284K Q4 2013. As of Q1 2014, overall website traffic has increased by 37% vs. year ago. The quality of the site visitors has also improved, as they are showing a greater interest in trip planning, with a 49.6% increase in hotel page views vs. Q4. We partly attributed this success to the streamlined and updated user experience created on the new site.

The site was completed in January 2014 and handed over to the JTB web team. FCB trained the JTB on the CMS and technical aspects and provided manuals and instructional tools to assist them in the future. FCB and the JTB are currently working together on various enhancements that will continue to keep the site as relevant as possible.

Added Value

Digital paid media began running in Q4 of 2013. We had 8,041,421 bonus/added value impression run from October 2013 to March 31, 2014. Based on an eCPM of \$6.45 (that was calculated using total cost and total impressions) this totals out to \$67,907.65 worth of media that ran as added value.

The Q4 2013 TV plan resulted in over delivering local GRP's by over 28 in NY and 25 in Chicago.

"The Bobsled Song" exposure generated approximately 33,500,000+ media impressions which equates to approximately \$20,000,000 in unpaid media.

Through our partnership with *Bridal Guide* we received added value social media placements on Facebook and Twitter.

CANADA

During the 2013/2014 fiscal year, Canada focused its efforts and budget towards extending the Jamaica Tourism brand through added value opportunities, to continue the adaptation of the US' "Get All Right" campaign in the Canadian market.

Added Value

In Winter 2013, JTB ran print insertions in *Lush Luxury Magazine* and *Talk Travel Magazine*, as well as its corresponding E-Newsletter. There was also retail presence in Sears via an in store pull-up banner that same quarter. Later in February 2014, Canada advertised the JTB in a back cover and inside editorial feature in *Talk Travel Magazine* once again. That same month, the brand continued to maintain its social media presence through a series of Facebook “Sponsored Posts” from February to March.

UNITED KINGDOM

During the FY13/14 year, UK activity focused around launching “Get all Right” in the UK to the general consumer, but also to the travel trade and the diaspora audiences.

As budget was limited, The UK was tactical with media opportunities, and optimized budget to make sure every opportunity was maximized. As such, the bulk of advertising took place in the UK’s key booking period of January – March.

During the January – March period, we ran press executions (*Metro/The Gleaner/Evening Standard/Stylist/Shortlist*) and online banners to specifically target the highly affluent London and South-East England areas. The banners performed very well – generating over 28m impressions during a short period and an above industry benchmark click-thru-rate.

The main campaign period was also amplified on the UK’s Facebook page and was further supported with online banner co-op activity with *Expedia*.

In addition to the main booking period activity, the UK also performed the following:

Television Activity

Through beautiful photography, the signature *One Love* music and the charisma of Usain Bolt, two commercials, “Speed” and “Stop,” were utilised to showcase the unique sights and sounds of Jamaica. The Bolt commercials were incredibly relevant in the run up to the 2014 Commonwealth Games where Team Jamaica is expected to dominate.

In co-op with Barrhead Travel, the media plan exclusively focused on STV in Scotland, to attract target audiences within the Glaswegian area in the main February booking period.

Diaspora Activity

During the Summer period of 2013, the UK ran a series of diaspora specific ads in *Pride Magazine* – to attract a younger diaspora audience. Ads ran in the front half of the Magazine from May – September.

Trade Activity

The UK used World Travel Market as a platform to launch *Get All Right* to the Travel Trade. To capture the attention of the press and important stakeholders, models were body-painted with the new branding. They were a huge success with many major publications running stories on the launch notably including *The Guardian*.

Furthermore – JTB ran ads in Trade publications *Travel Weekly* and *TTG* to support the launch.

Added value

At World Travel Market – PR coverage from the models at the stand came to a value of £9,000.

PUBLIC RELATIONS – THE AMERICAS

Ruder Finn, Inc. was first appointed in October 2003. After a tender process conducted in accordance with the government's procurement requirements in 2006/07, **Ruder Finn, Inc.** had retained the contract as the JTB's public relations agency for **The Americas (North, South & Central)** effective February 1, 2007, for the three-year period up to January 31, 2010. With the approval of Cabinet, this contract period was extended for one year, to January 31, 2011, then to January 31, 2012, and further extended to March 2012 to allow for the completion of a tender process begun in 2011.

At the completion of this procurement exercise, Ruder Finn – now called **Finn Partners** - was awarded the contract for the five-year period April 2012 to March 2017, for **The Americas (North, South & Central)**.

The following report provides an overview of Finn Partners public relations activities for the period April 2013 – March 2014 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:

Wrote and distributed **65** press releases and media alerts, as well as **40** 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.

Press Trips:

The Agency organized **20** group press trips covering niche areas and supporting JTB-sponsored events such as Annie's Revenge, Reggae Sumfest and JAPEX. Niche areas include bridal, culinary, music, history, arts and culture, blogger outreach, travel trade and more. A sampling of media outlets that were secured on press trips included the following:

- *Yahoo.com, Ebony.com, NY Daily News, Billboard, Huffington Post Travel, About.com, NPR, Chicago Tribune, Canadian Geographic, Toronto Sun, Men's Journal, Brides.com, Busy-Mommy.com, Once Wed, Jewish Life Television and many more.*

6 Individual Press Trips had been secured. A sampling of media outlets includes the following:

- *The New York Times, Billboard, NYC Pretty, Westworld, El Nuevo Herald and more.*

Promotions:

Arranged **21** 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:

- **Print:** *Baltimore Ravens Cheerleader Calendar, Luxe Magazine*
- **Radio Broadcast:** WBLS-FM/NY; CBS Radio Orlando; WYKS-FM/Washington, DC; WDHA-FM/New Jersey; WURD-AM Philadelphia; Kiss 108-FM Boston
- **Retail:** Jamba Juice, Bosch Dishwashers
- **TV Broadcast:** Let's Make a Deal, Wheel of Fortune

Advertorials:

Drafted copy for **8** national, regional and trade advertorials with outlets such as:

- *Chapel Hill News & Views Magazine, National Weekly, Atlanta Business Journal, LUXE Magazine, With Ease Magazine, Classic Vacations: Romance, Classic Vacations: Family and Connecticut Jerk Festival.*

Events:

- Americas Incentive, Business Travel & Meetings Exposition
- BNP Paribas Taste of Tennis
- Boston Globe Travel Show
- Caribbean Travel Marketplace
- Caribbean Week NYC
- Caribbean Week in Toronto
- Fay Pickersgill Book Signing
- Here Comes the Bride Wedding Expo
- International Meetings Exchange 2013

- Jamaica Bridal Expo
- Jamaica Coffee Mornings
- Jamaica Jazz & Blues Art of Music Festival
- JHTA/JTB Marketing Workshops
- JTB/Delta Air Lines Launch Reception
- Kingston City Run
- Maxi Priest Listening Party
- NYUL Football Classic
- New York Times Travel Show
- Reggae Sumfest
- Reggae Marathon
- Round the World Clipper Race
- Usain Bolt Book Signing

Major Broadcast Initiatives:

- *Fox & Friends* (June 4, 2013) – Jamaican chef, Brian Lumley was featured on the morning show during Caribbean Week in New York to showcase his recipes for viewers to try.
- *Travel Channel's Island Secrets* (June 6, 2013) –This episode gave an inside look at Jamaica's history as well as its natural wonders and accommodations the island has to offer.
- *PIX 11* (June 7, 2013) – Brian Lumley—popular Jamaican chef—provided recipes and preparations of his Caribbean inspired dishes on the morning show during Caribbean Week in New York.
- *Magic Man "Jamaican Me Awestruck"* (August 2013) – The magician travelled to Jamaica and performed up-close tricks to locals and visitors.
- *HGTV's House Hunters International* (August 22, 2013) – In this episode, a couple makes a big move from Texas to Jamaica.
- *Colorado & Company* (October 2013) – A Jamaican segment was aired on Colorado & Company featuring JTB's Dian Holland with Apple Vacations.
- *Travel Channels' Hot Movie Sets* (October 2013) – The episode highlighted Jamaica as a famous movie set with films like *Cocktail* shot on the island.
- *FOX TV - Connecticut* (November 2013) – Jamaica Tourist Board's Chris Dobson was interviewed about the island and reasons to visit the destination.
- *Peter Greenberg's Travel Detective* (December 2013) – Jamaica was featured on an episode of the "Hidden Gems" segment on Peter Greenberg's Travel Detective on PBS. The segment

highlighted Port Antonio and included a performance by the Jolly Boys as well as a cooking demonstration by the Rousseau sisters.

- *CNN's Piers Morgan* (February 2014) – Piers Morgan interviewed Jamaican bobsled pilot Winston Watts on the team's participation in the Sochi 2014 Winter Olympics.
- *WNBC New York Live* (February 2014) – A segment titled "Escape Winter with a Trip to Jamaica" featured special guest, Chef Nigel Spence, who cooked and shared delicious Jamaican recipes.
- *MSNBC's Up with Steve Kornacki* (March 2014) – In his "Upsets and Underdogs" segment, Steve Kornacki interviewed Devon Harris, an original member of the Jamaican bobsled team.

Social Media:

Jamaica Get All Right Social Media Activations - In support of the Get All Right campaign launch, Finn Partners launched a series of social media activations including a Facebook App, a Twitter Chat, and a destination-wide deals landing page. The Facebook App was live from November 12-30, and was supported by paid and organic content, receiving over 1,200 entries, and over 1,500 new page likes. The Twitter Chat took place on November 19 and had 181 participants, garnering over 1,000,000 impressions and reached 216,545 Twitter handles. The destination-wide deals page was launched on November 12, and was supported by media, social media, and real-time event outreach. This page had a total of 308 UMs from November 12-30.

Social Media and Public Relations Workshops – Finn Partners worked with the JTB social media team to present at a two-day social media and public relations workshop with travel industry partners in Montego Bay and Ocho Rios.

#JamaicaBobsled Activations – The Agency planned and executed a Twitter chat surrounding the Jamaican Bobsled team participating in the Sochi 2014 Winter Olympics. A number of media joined the conversation including Victoria Neidigh from NBC Universal; Carol Margolis from Smart Women Travelers and Twitter Sports. Total impressions were over 5 million. In addition, the team created a the Bobsled Bulletin App, a Facebook app that presented a real-time photo stream of images and tweets sharing well wishes for the team on Instagram and Twitter with hashtag #JamaicaBobsled. It also pulled in images and tweets from Winston Watts, Chris Stokes, and the official handle for the team. In 5 days, the app garnered over 10,000 entries.

Special Projects:

Peter Greenberg, Travel Detective – Agency worked with production team to shoot an episode of the “Hidden Gems” segment on Peter Greenberg’s Travel Detective. The series highlighted Port Antonio as well as the voluntourism offerings at Great Huts. The show was aired on PBS in the Fall of 2013 and continues to air.

“Get All Right” Advertising Campaign Launch Promotions– Participated in publicity support for the new campaign advertising launch. Agency executed publicity components to support the advertising campaign launch including:

- Working with VP Records for continuous reggae music in Times Square to set the environment around the stress ball.
- Securing and coordinating street team ambassadors
- On-location promotions and giveaways
- Social media activations
- Morning show outreach with Good Morning America including photo Tweets
- Social Media trip giveaways: Facebook and Twitter
- Website destination deals: <http://www.getallrightjamaica.com/>

Jamaica Get All Right Clipper Race— Agency completed VIP travel agent sail and media reception in San Francisco to welcome the Clipper Ship to the U.S. Business Development Manager Dian Holland attended the sail, along with Jamaica Travel Specialists. Lunch was catered in special JTB branded lunch boxes.

Only in Jamaica/Get All Right eNewsletter—Agency re-designed and re-launched the newsletter to capitalize on the Jamaica – Get All Right Campaign. Additionally, the newsletter was renamed the “Get All Right.”

New York Times Travel Show 2014, NYC—Agency provided on-site support on the trade media day on Friday, February 28th. The JTB booth included two travel agent specialists, including Massive Travels and Got to Travel, as well as hotel participants Jewel Resorts, Sunset Resorts and Holiday Inn SunSpree.

Jamaica Bobsled Team Media Coverage Video--The Agency created a video compilation of placements of the Jamaica Bobsled team’s most memorable moments during the Sochi Winter Olympic Games. The team received over 1,300 mentions on major broadcast networks such as ABC, CBS, FOX and NBC.

Written Materials:

- Produced, designed and distributed monthly eNewsletter ***Only in Jamaica*** and quarterly eNewsletter ***Meet You in Jamaica*** to consumers, media, and travel agents in the U.S. and Latin America. In addition, designed and drafted ***Island Vibrations*** for Canadian media and trade.
- Conducted daily **media monitoring** as well as special monitoring based on current or special events.
- Prepared letter to tour operators on restrictions under the Customs Act about the wearing of camouflage in Jamaica.
- Prepared remarks for Deputy Director of Tourism Jason Hall for Caribbean Fashion Week press conference.
- Prepared public relations handbook on behalf of the JTB for presentation to the Jamaica Hotel and Tourist Association (JHTA).
- Prepared destination copy for World Routes and Airline Conference website.
- Prepared remarks for delivery at Annie's Revenge Press Conference.
- Created media briefing document for JTB's Rosemarie Johnson for *Meet The People* interview.
- Prepared remarks for Tourism Director John Lynch at Merritone Family Reunion media launch.
- Prepared message for Donnie Dawson, Deputy Director Tourism for inclusion in LUXE Magazine.
- Created talking points for Tamara Christie for Delta media reception held in Atlanta.
- Prepared remarks on behalf of Director of Tourism John Lynch for the Jamaica launch of the MasterCard Priceless Cities Program at Sans Souci.
- Prepared remarks for the Tourism Director to deliver at the 40th Annual Dr. Ena Thomas Memorial Symposium and Lecture.
- Prepared remarks Director of Tourism John Lynch for Caribbean Travel Marketplace press conference announcement.
- Prepared remarks on behalf of Tourism and Entertainment Minister for delivery at the "White Affair" gala.
- Prepared message for Tourism and Entertainment Minister for TV Broadcast to mark the 2013/2014 Winter Tourist Season.
- Prepared New Year's letters for Director of Tourism for distribution in the US, Canada and MICE markets.

- Prepared remarks for the Director of Tourism for Caribbean Travel Marketplace press conference.
- Prepared presentation for Tourism Director John Lynch to deliver at the JHTA Annual General Meeting reviewing the past year, assessing Jamaica's performance in the last year, and looking at partnership opportunities to grow the industry.
- Designed and submitted ad for Consul General's Heritage Awards in New York.

Jamaicans Overseas Support:

- American Friends of Jamaica (AFJ) support
- Children of Jamaica Outreach (COJO) support
- American Foundation for the University of the West Indies (AFUWI)
- Ongoing support of JAMPACT
- Ongoing support for Union of Jamaica Alumni Associations (UJAA)
- Support of Braata Productions
- Support of Caribbean Cultural Theatre
- Support for Team Jamaica Bickle (TJB)

Select Placements/Highlights:

Bridal

- *The Trentonian*—August 1, 2013—"Jamaica Offers a Region to Fit Your Wedding and Honeymoon Style"
- *Love Tripper*—August 13, 2013—"Jamaica Tourist Board Launches Bridal Twitter Chat #JaBrides"
- *The Knot*—December 1, 2013—"Honeymoon Homework"
- *Fodor's Travel*—January 20, 2014—"World's Best Places for a Destination Wedding"

Culinary

- *New York Daily News*—September 8, 2013—"‘Potluck’ Show Hypes Jamaica's Cuisine"
- *Chicago Tribune*—September 12, 2013—"Venturing Outside Resort Walls Serves Up a Culinary History Lesson"
- *Cruiseline.com*—October 18, 2013—"Best Jerk Chicken: Scotchies, Ocho Rios, Jamaica"
- *Orb.ology*—December 6, 2013—"Four Caribbean Islands for Foodies"
- *New York Times*—February 21, 2014—"On a Tropical Rum Trail"

- *South Florida Caribbean News*—March 31, 2014—“Jamaica’s Rousseau Sisters Add Island Spice to New York Times Café”

Family

- *Busy-Mommy*—August 9, 2013—“The Grand Palladium: Family-Friendly Jamaican Hotel”
- *USA Today*—October 9, 2013—“Ocho Rios Family Vacation Guide”
- *Babble.com*—October 31, 2013—“10 Reasons to Take an International Family Vacation”
- *GUBLife.com*—March 28, 2014—“Spring Break: Jamaica Family Fun”

General Travel

- *Black Enterprise*—June 20, 2013—“Still Planning Your Summer Travel? Discover All That Jamaica Has to Offer!”
- *Busy-Mommy*—August 26, 2013—“Bucket List Activities Fulfilled in Jamaica”
- *Travel and Leisure*—October 1, 2013—“Best Affordable Island Hotels”
- *USA Today*—October 9, 2013—“Experience Jamaica”
- *The New York Times*—March 27, 2014—“36 Hours in Jamaica”

Music

- *Travel Agent Central*—June 26, 2013—“This Year’s Jamaica Reggae Sumfest to Feature Grammy Award-Winning Musician Miguel, Rapper Flo Rida”
- *The New York Times*—July 21, 2013—“In Transit: Reggae Sumfest”
- *G Caribbean*—August 1, 2013—“Jamaica Jazz & Blues Festival 2013”
- *Smart Meetings*—February 1, 2014—“Bouncing to the Beat”
- *Caribbean 360*—March 6, 2014—“Jamaica’s Tessanne Chin Sings at the White House Tonight”

Sports

- *The Golf Guide*—Fall 2013—“Jamaica: Once You Go, You Know”
- *Gotham Magazine*—September 5, 2013—“Taste of Tennis”
- *The Gleaner*—November 19, 2013—“Usain Bolt Launches New Book ‘Faster Than Lightning’”
- *Smart Meetings*—February 1, 2014—“Bobsled Time”
- *Ebony*—March 26, 2014—“Cool Runnings at the Kingston City Run”
- *Busted Coverage*—March 30, 2014—“Ravens Cheerleaders Want Fans at their Swimsuit Calendar Shoot”

Trade

- *JAXFAX*—July 1, 2013—“Skip the Strip: Selling Adventure in Jamaica”
- *Travel Agent Central* – July 16, 2013—“Crash Course in Jamaica Culture – 24 Hours in Kingston”
- *Travel Weekly* – November 11, 2013—“Jamaica "All Right" with New Slogan”
- *Travel Agent Central*—February 4, 2014—“Kingston Set to Rock in February for Reggae”
- *Travel Weekly*—March 7, 2014—“Challenge Course Opens in Treasure Beach, Jamaica”

Canada

- *Vitamin Daily*—June 13, 2013—“Jet to Jamaica”
- *Reader’s Digest Canada*—August 12, 2013—“10 Surprising Must-Visit Foodie Destinations”
- *Ensemble Vacations*—September 30, 2013—“Caribbean Golf’s Front Nine”
- *Toronto Star* – November 18, 2013—“Jamaica Seen from the Pelican Bar”
- *Canada.com*—February 11, 2014—“Soaking It Up in the Land of ‘Yeah Mon’”
- *MSN.ca*—February 12, 2014—“Best Beach Resorts in the World”
- *Dobber Nation Loves Blog*—March 24, 2014—“Review: The Sugar Mill Half Moon, Montego Bay”

Hispanic

- *Hombre* – June 17, 2013 – “Spanish Court Hotel: Live it up Spanish style in Kingston, Jamaica”
- *Absolut Caribe*— September 18, 2013 – “Entregan premios del Travel World Awards 2013”
- *El Nuevo Herald* – December 2, 2013 – “Paseo por la costa norte de Jamaica”
- *Latin Trends* – January/February, 2014 – “Island beauty: An adventure in Jamaica”
- *GubLife* – March 28, 2014 – “Spring Break: Jamaica family fun”

Latin America

- *Jornal de Turismo* – May 9, 2013 – “Jamaica, o paraíso do Rei do Reggae”
- *O Tempo* – October 5, 2013 – “Jamaica vai além dos clichés”
- *El Universal* – October 7, 2013 – “Un día con Rastafaris”
- *El Tiempo* – January 29, 2014 – “Tributo a la cultura rasta”

Other

- *The New York Carib News*—July 3, 2013—“Fashion Fun in the Sun at Styleweek in Jamaica”
- *Endless Vacation*—October 1, 2013—“Top Caribbean Beach Bars”
- *New York Daily News*—November 17, 2013—“JA Affair Heats Times Square”

- *The Jewish Week*—November 20, 2013—“A Jewish Revival in Kingston”
- *USA Today*—January 21, 2014—“Get Off the Beaten Path in Jamaica”
- *Huffintgon Post*—February 17, 2014—10 Best Hotels for the Perfect Babymoon
- *The Washington Post*—March 11, 2014—“The Happiest Post We’ve Ever Done”

Media Impressions

Total media impressions by region are as follows:

- United States: **969,014,695**
- Canada: **69,717,972**
- Latin America: **163,467,525**

PUBLIC RELATIONS – UK / EUROPE

The public relations agency review which was conducted by the JTB’s Board in 2006/07 in accordance with Government’s procurement regulations had resulted in the appointment of **McCluskey International Ltd. (MI)** as the JTB’s Public Relations Agency for **the United Kingdom, Ireland and Northern Europe**, for the three-year period March 1, 2007 to February 28, 2010. With the approval of Cabinet, this contract period was extended for one year, to February 28, 2011, then to January 31, 2012, and further extended to March 31, 2012 to allow for the completion of a tender process begun in 2011. **McCluskey International Ltd. changed its name to McCluskey International Holdings Ltd. during this process.**

At the completion of this procurement exercise, **McCluskey International Holdings Ltd.** was awarded the contract for the five-year period April 2012 to March 2017, for **the United Kingdom, Ireland and Northern Europe.**

McCluskey International (MI) is responsible for all elements of PR/Communications for the Jamaica Tourist Board across UK, Ireland and Northern Europe markets. MI PR activity supports all functions of the JTB marketing mix, including:

- Marketing/promotional activity
- Press trips (trade and consumer)
- Promotions
- Meetings and incentives

- Social media and online activity – management of facebook, twitter and instagram
- Diaspora relations and 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
- Monthly travel trade newsletter creation and distribution

Highlights

- **£1,878,606 (\$3,122,619)** worth of coverage generated
- **72,413,951** people reached
- **158** pieces of media coverage generated
- **4** pieces of broadcast coverage generated
- **391** journalists liaised with
- **38** press releases prepared and distributed
- **22** publications hosted on press trips

Rampage Notting Hill Sound System Sponsored by Jamaica Tourist Board

- On behalf of Jamaica Tourist Board, McCluskey International partnered with Rampage Productions to target the urban, youth audience in the UK through experiential, social media and broadcast media interactions

Aims:

- To promote the Jamaica Tourist Board within the youth and urban audiences in the UK at a key urban event – Notting Hill Carnival (the 2nd largest carnival in the world)
- To increase social media interactions through user participation in the #JamaicaRampage holiday competition
- To increase page views and ‘Likes’ on Facebook and increase ‘Followers’ and engagement on Twitter
- To widen the scope of Twitter engagement from B2B to B2C
- To encourage the UK audience to visit and experience Jamaica for themselves

Results

- Total target audience media outreach: 1,350,194
- Total holiday competition entrants: 13,250

- As a result of the #JamaicaRampage campaign the Jamaica Tourist Board's UK facebook page 'Likes' increased in Summer by: 1,153.8%
- Total engagement has increased by: 168.7%
- 42,080 unique users engaged with Rampage regarding holiday competition via Facebook and Twitter
- 13,500 interactions per week regarding holiday competition
- 12,000 unique user Facebook posts regarding Jamaica Rampage

London Launch of 'JAMAICA Get All Right' in the Clipper Round The World Yacht Race

- The Clipper Round The World Yacht Race provides the perfect platform to showcase Jamaica to a global audience and in September, the Clipper Round the World Yacht Race set off from St Katherine's Dock in London, and the McCluskey International team were on hand to maximise JAMAICA's involvement.

Aims:

- To showcase Jamaica to a global audience and highlight that Jamaica is more than just a holiday destination - it's a feeling, it's an experience
- To promote the launch of the Jamaica Tourist Board's yacht, Get All Right, at St Katherine's Docks through a media on-board reception on 29 August 2013 and the official departure of the Jamaica Tourist Board's yacht, Get All Right, at St Katherine's Docks on 1 September 2013

Results

- Total coverage to December 2013: £91,872.00
- 25 pieces of coverage generated to December 2013
- http://www.youtube.com/watch?v=rfp_pY2_oEw

World Travel Market Trade Launch of 'JAMAICA Get All Right' branding

- In Autumn, McCluskey International was tasked with supporting the Jamaica Tourist Board at World Travel Market 2013 (4 – 7 November) in order to maximise trade and media exposure for Jamaica Tourist Board and its partners.

Aims:

- To capitalise on Jamaica's profile and further promote Brand JAMAICA
- To launch the new Jamaica Tourist Board branding JAMAICA Get All Right
- Ensure MOT and DOT met with key travel and trade media attending the show
- <http://www.youtube.com/watch?v=ibVFExBNEPU>

Results

- £72,772.49 worth of coverage generated to December 2013.
- 2,384,492 people reached via media exposure
- 30 pieces of coverage generated to date
- 6 press releases distributed
- 29 media meetings on the stand
- 6 MOT and DOT face-to-face media interviews carried out at WTM

Media Events in the UK

MI collaborated on several traditional and social media events on behalf of the JTB including the following:

JTB and London Fashion Week launch

- The Jamaican London Fashion Week Showcase, entitled '*Threadbare*', debuts the work of five emerging fashion talents from the island. Jamaica's debut at London Fashion Week confirmed Jamaican design talent as a reputable and significant part of the cutting edge emerging fashion landscape.
- The showcase was sponsored by JTB and several other partners, including the Jamaican High Commission, Jamaican Business Development Corporation and The British Fashion Council.
- To date 11 pieces of coverage have been generated reaching 190,000 readers and 283,500 web visitors.
- Jamaica's presence was also promoted via social media, receiving 968 facebook views.

TUI Thomson Dreamrunners launch

- On 24 February, Thomson Cruises unveiled its latest promotional film to launch its 2014 and 2015 sailings from Montego Bay, Jamaica.
- The video featured Olympic medallist, Yohan Blake taking on world renowned free runners 3RUN, who've worked on Hollywood blockbusters like Casino Royale and World War Z. 3RUN flip over Blake in the starting blocks and race against him as they free run across Jamaica to get to the cruise ship, Thomson Dream, before it sets sail from Montego Bay.
- The Parkour and stunt professionals filmed the scenes with Blake at the Jamaican runners training ground in Kingston, and even got the runner to pull his famous beast pose for the camera. The film also sees the fearless free runners scaling Dunn's River

Falls, flipping over market stalls in Ocho Rios and diving from the cliffs in Negril, before vaulting onto jet skis to chase Thomson Dream and scale its sides James Bond style.

- Filming took place in December 2013 and the filming and script was created and executed by TUI Thomson and Jamaica Tourist Board and co-ordinated and facilitated by McCluskey International.
- 135,500 film views - <http://www.youtube.com/watch?v=1-1rint5mXM>

Island Vibes Newsletter

- **Recipients:** 3,966 each month
- **Total opens:** 629 for February newsletter
- Content for the newsletter on a monthly basis includes:
 - JTB News
 - Travel Agent News
 - My Booking Rewards & Competitions
 - Events and Attractions
 - Hotel News
 - Special offers and packages

Press Trips

McCluskey International confirmed and managed the following media on press trips to Jamaica:

- Cleo Murphy, Travel Extra, 26 April-1 May 2013
- Julie Baxter, Selling Long Haul, 26 April-1 May 2013
- Pippa Jacks, TTG, 26 April-1 May 2013
- Simon Turnbull, The Independent, 12-17 March 2013
- Amanda Statham, cosmopolitran.co.uk, 17-24 May 2013
- David Whitley, Sunday Times Magazine, 12-20 September 2013
- Kounteya Sinha, Times of India, 26 June - 3 July 2013
- Reshma B, Clash Magazine, 19-26 July 2013
- Doc Brown, blogger and media personality, 31 July -14 August 2013
- James Henderson, Daily Telegraph, 7-11 November 2013
- Sara Macefield, Daily Express, 7-11 November 2013
- Natalie Ticehurst, OK! Magazine, 7-11 November 2013
- Julie Powell, Good Housekeeping, 7-11 November 2013
- Polly Humphris, Mail on Sunday, 4-8 December 2013
- Amol Rajan, The Independent, 3-17 January 2014
- Charles Kao, Travel Mole, 12-17 January 2014

- Sally Parker, Selling Long Haul, 12-17 January 2014
- Gary Noakes, TTG, 12-17 January 2014
- William Cash Spears Magazine, 2-12 March 2014

Awards

MI worked in partnership with the JTB on the following awards and submissions:

- British Travel Press Awards, July, 2013
- November 2013 - World's Best Cruise Destination 2013 at the inaugural Amadeus and WTM World Travel Experience Awards
- Best Exhibition Presence, Travel Marketing Awards December 2013

Crisis Management

MI has dealt with several issues, implementing issues and crisis management strategies for the following incidents:

- Illegal farm cannabis tours (September 2013)
- WADA Doping Scandal (January 2014)
- Alleged police civilian killings (January 2014)
- Fatal jet-ski accident (January 2014)

SALES ACTIVITIES

U.S.A.

The new advertising campaign tagline “**Jamaica, Get All Right**” will be used in all opportunities to support the proposition that Jamaica is **THE** place to visit and to be seen.

All JTB travel agent presentations will now be branded Jamaica Travel Specialist “**Get All Right**” **Events** and Jamaica Nights have become **Jamaica “Get All Right” Nights** as we take the new campaign to the agents and get them behind our new strategies.

The **Jamaica Travel Specialist, A One Love Rewards Program** continued to be our main marketing tool in our interaction with the travel agent community, since the launch of the program in February 2012. The introduction of the program’s online store in March 2013 added new incentives for the travel agents to become members of the program. At the end of March 2014, there were over 12,000 graduates of the program. We continue to enroll industry partners. Currently there are 30.

Fam Trips were key activities as we continued the process of educating our agents on Jamaica. The designated Fam Tour Months are September and November.

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

Social Media remains a high priority in engaging both our consumer and trade in promotions strategy. Greater emphasis was on the use of all **social media** platforms, (Facebook, Twitter, etc.), at our disposal to augment traditional marketing and promotional efforts.

High activity was in the **Groups** department with emphasis on highlighting the Montego Bay Convention Center.

There was continued expansion in **Latin America**, with increased trade activity.

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.

Highlights for the period were:

JTB Product Update

During the period **September 2013 – March 2014**, the Jamaica Tourist Board USA conducted a series of seminars, sales call blitzes and joint sales calls with supplier partners. Over 1,306 agencies were visited during the sales calls blitzes and some 2,100 travel agents were hosted to dinner, exposed to the Jamaican culture and updated on the destination's tourism product.

Training Sessions – This type of outreach to reservations agents remains a very effective method of updating them on Jamaica's tourism product. With the constant improvements to our tourism product, training sessions are conducted by the USA Sales Team on a regular basis to update reservation agents and our tour operator/airline partners. Some 3,000 reservation agents were trained in 60 cities on how to effectively sell Jamaica's tourism product.

Trade Partner Shows - Another key element in reaching the travel agent community is through our attendance at shows organized by our trade partners for both travel agents and consumers. For the reporting period, some 18,000 agents and consumers were reached through a total of 110 shows. This remains an excellent conduit of reaching the operators' top selling agents and their clients.

Fam trips – Agents sell what they see and learn. Our travel specialists continue to receive updated information on the product through conducted tours on island. Because of the high cost of airfares and the reduction in fam trip seats partnership with airlines, the number of agents hosted on island was reduced. Some 36 trips hosting 450 agents were completed in 2013.

Jamaica Travel Specialist, A One Love Rewards Program



The Jamaica Travel Specialist program launched on February 1, 2012 through Questex Media's Travel Agent University, the industry's largest online travel education website, continues to be the major focus of the Board's interaction with the travel agent community. Jamaica's A One Love Rewards Program serves as a dedicated training platform for the travel agent community to become experts on the destination.

This online training program was developed for travel agents to learn about Jamaica, how to sell Jamaica and be rewarded for increased bookings. Training is currently in English and French. On graduation, agents receive a welcome/congratulatory letter, JTS branded items – window sticker, lapel pin and ID card.

Benefits include:

- On-island VIP services (airport meet/greet, individual site inspections etc.)
- Monthly award of \$300 to the top-booking Jamaica agent of 10 or more bookings
- A downloadable graduate diploma from Travel Agent University
- A preferred agent listing on the official www.visitJamaica.com website
- Exclusive consultations with JTB Business Development Managers
- VIP familiarization tours
- 50% discount for Club Mobay
- Jamaica's monthly e-Newsletter, which lists deals from across the island for clients to consider.
- Invitation to the 'Annual White Affair Weekend' honoring the 50 top producing Jamaica Travel Specialists.

Jamaica Travel Specialists Online Store

In March 2013, the travel agent specialist on-line One Love Rewards store was launched, giving agents an extra incentive to book Jamaica vacations. With the rewards store, graduates for the program can shop for a range of items such as accommodations and Jamaica-branded merchandise, using points earned based on hotel rooms booked. The One Love Rewards store currently includes offerings from 30 supplier partners.

NATIONAL EVENTS

- ***JA-GA (Jamaica/Galveston) Reggae Festival, Galveston, TX*** – April 12-14, 2013. Some 20,000 consumers attended this first annual Ja-Ga Reggae Festival on Galveston Island. The three-day festival included reggae music as bands from major cities across the U.S. competed in a reggae-style "Battle of the Bands" competition. JTB had a booth with an image of the seven-mile beach in Negril. Patrons were encouraged to take photos and upload to their social network profiles.
- ***Mom's Nite Out*** – May 9, 2013. Destination Jamaica hosted consumer lounges at selected Simon Property Group Malls in the Northeast – Burlington, MA; White Plains, NY; Garden City, NY; Lawrenceville, NJ and Arlington, VA. This pre-Mother's Day series targeted

mothers with an evening-out where they enjoyed a range of special fun activities within the malls. The patrons were provided with information on the destination and treated to Jamaican cuisine, entertainment and give-away items. Hotel partners joined the JTB representatives at 4 of the 5 malls – The Jewel Resorts, Couples Resorts, Round Hill Hotel & Villas and Sandals/Beaches Resorts.

- ***Delta Block Parties*** - May 18 and June 8, 2013. JTB supported our industry partner, Delta Airlines, at their annual block parties held for the employees, families and friends in Atlanta, GA on May 18 and Minneapolis, MN on June 8. JTB had a booth at both events and provided information on the destination, entertainment and small give-away items. Some 5,000 persons attended the block party in Atlanta and 10,000 in Minneapolis.
- ***Caribbean Week in New York*** – June 4-7, 2013. This event, organized by the Caribbean Tourism Organization, is a celebration of the sights, sounds, colors, culture and unique vacation attributes of the Caribbean. The week combines business sessions and sponsored events with food, entertainment and networking opportunities. Caribbean Week attracts over 10,000 participants.
- ***Jamaica Coffee Morning, New York City, NY*** – June 6, 2013. JTB hosted ‘Jamaica Coffee Morning’, a consumer promotion at two locations in Manhattan, NY. The event provided extensive branding opportunities and participating consumers were updated on the Jamaican tourism product as they shared in a ‘taste’ of Jamaica in the form of Blue Mountain Coffee & a pastry item and JTB promotional travel material packed in JAMAICA lunch totes. As added exposure, participants had the opportunity to submit entries for accommodation for two, courtesy of Holiday Inn Sunspree.
- ***Taste of the Caribbean*** – June 26-30, 2013. This culinary competition was held at the Hyatt Miami with teams from Jamaica, Anguilla, Bahamas, Barbados, Bonaire, Curacao, Puerto Rico, Surinam, Trinidad & Tobago and the USVI. Team Jamaica had 10 members taking part in several categories of competition. The Jamaica team came away with 13 medals along with *Top Chef of the Caribbean – Brian Lumley*. This event had some 500 consumers in attendance and JTB had a booth promoting travel to Jamaica.
- ***Grace Jamaican Jerk Festival*** – July 21, 2013. JTB had a promotional booth at the annual Grace Jerk Fest in Queens, NY. Consumer prize trip giveaway gave booth representatives the chance to interact and promote the destination verbally, using promotional destination

travel materials and hotel price point promotional flyers. Hotel partners included Sunset and Jewel Resorts. Jamaican artist Paul Blackwood exhibited his paintings at the booth which added to the décor with Jamaican nostalgic images for the Diaspora consumers who visited.

- ***CBS Radio sponsorship of the Orlando, FL 5th Annual Back to School Expo – August 3, 2013.*** This 5th Annual Back to School event was held at the Seminole Town Center Mall in Orlando, FL where JTB had a display booth with general information and vacation packages, offered through a partnering Jamaica Travel Specialist. The JTB sponsored a hair braider at this event which was very popular with the crowd. There were approximately 7,000 consumers in attendance.
- ***Delta Air Lines Launch, Atlanta, GA - September 12, 2013.*** Approximately 150 local Jamaica Diaspora and industry partners were informed of Delta Air Lines new route from Atlanta, GA to Kingston. Many expressed their appreciation of the new service and are making plans to actively promote it and utilize the service. The inaugural flight was December 19, 2013.
- ***Jamaica Luxury Experience, Dallas, TX - October 10, 2103.*** Pettigrew Luxury Furnishings, a premier furniture store in the Dallas Design District created a Jamaican-themed line of furniture and introduced it to the public with a Jamaican-themed in-store unveiling event. Island Outpost partnered with the JTB in providing information on the destination and provided a hotel prize-giveaway. 190 consumers attended.
- ***Bob Marley Exhibit ‘The Messenger’, Miami, FL – October 10, 2013.*** This consumer event celebrated the life of Bob Marley, was held at the Museum of Miami. 500 consumers were in attendance. JTB had an information table at the event and an interactive kiosk which allowed the patrons to take a photo while at the exhibit to upload to their social network. JTB was able to build a database as the individuals had to enter contact information prior to having photo access.
- ***Boo at the Zoo Jamaica Promotion, Brookfield, IL – October 19-20, 2013.*** This is an annual family Halloween event. Over 50,000 consumers attended. JTB provided information on the destination, sponsored a band and a prize trip give away courtesy of Apple Vacations and Sunset Resorts.
- ***ING NYC Marathon and Health & Fitness Expo, New York, NY – October 30 – November 2, 2013.*** JTB and supplier partner Reggae Marathon hosted a promotional booth at the Health

& Fitness Expo where the runners, accompanied by their families and friends, got the opportunity to obtain information on the destination and the annual Reggae Marathon. Over 8,000 persons were in attendance.

- ***Grace Jamaican Jerk Festival, Sunrise, FL***, November 10, 2013. This is the largest Caribbean food festival in the US. It attracts over 25,000 consumers representing mostly Caribbean and African-American patrons between the ages of 25-60 years. It is an outdoor event featuring West Indian culture, music and cuisine, drawing attendees from the Dade, Broward and West Palm Beach counties. This presents an excellent opportunity to showcase the Jamaican tourism product. JTB had a large booth at this event, now in its 12th year. Four hoteliers joined us in the booth where information vacation packages were disseminated.
- ***Jamaica Invitational Pro-Am – Annie's Revenge, Montego Bay*** – November 20-24, 2013. The Jamaica Invitational Pro-Am is Jamaica's largest international Pro-Am tournament. Annie's Revenge has quickly become one of golf's most popular winter tournaments with teams coming from the U.S., Canada, Europe and the Caribbean. Some 37 teams competed with a mixture of Pros and Amateurs at two golf courses (White Witch and Cinnamon Hill) over 3 days. The Jamaica Tourist Board hosted hospitality booths at each golf course that provided different flavors of Jamaican cuisine and culture to golf participants. The event also featured evening functions with a final grand awards ceremony. All participants expressed great satisfaction with the event as well as the destination and the golf & accommodations product.
- ***Ravenswalk Promotion, Baltimore, MD*** – November 24, 2013. JTB hosted a display booth on Ravenswalk at M & T Stadium. Over 50,000 fans walked through the Ravenswalk en route to the Baltimore Ravens vs New York Jets football game. Highlights of the booth included promotional items and a prize-trip (to Jewel Resorts), giveaways as well as picture taking with the Ravens Cheerleaders. JTB also hosted a VIP Hospitality Tent where there was opportunity to network with the 30 VIP ticket holders. They enjoyed sumptuous cuisine prior to attending the football match with tickets won during a pre-event social media campaign and a radio station tie-in promotion.
- ***Planning Meeting - JTB USA & Canada, Montego Bay*** – December 5-6, 2013
The sales staff of JTB USA and Canada met at the Royalton White Sands Resort to hold a planning meeting to discuss activities/strategies for promoting Jamaica's tourism product

in 2014. Staff members from JTB Montego Bay, JTB Kingston, Finn Partners and DraftFCB were also present.

- ***Jamaica Travel Specialists – ‘White Affair Weekend’, Montego Bay*** – December 7-10, 2013. The top 50 producing Jamaica Travel Specialists were honored at this second annual event, hosted at Royalton White Sands. The agents were allowed to take a companion. Experiences at attractions & tours, spa treatments, shopping and optional fam tours were all a part of the exciting weekend enjoyed by the agents. The weekend culminated in a grand ‘all white’ event at the host hotel where the agents received a plaque signifying their achievement. They all reported positively on the experience and expressed the intention of working even more diligently to book Jamaica to ensure that they are included in the top producing list for 2014.
- ***CHTA Caribbean Travel Marketplace 2014, Montego Bay Jamaica*** - January 12-14, 2014. This event consists of pre-scheduled appointments between suppliers and buyers. The main objective is for suppliers and buyers to conduct negotiations that benefit the region.
- ***ING Miami Marathon – Total Health & Fitness Expo, Miami, FL*** - January 30- February 1, 2013. The Jamaica Tourist Board partnered with the organizers of Reggae Marathon to promote Jamaica’s tourism product offering and specifically the Reggae Marathon event in Negril, held in December annually. Over 30,000 sports and fitness enthusiasts attended.
- ***Boston Globe Travel Show, Boston, MA***, February 7-9, 2014. JTB hosted a promotional booth at this 3-day event attended by travel agents and consumers in the New England region. Promotion included hotel trip giveaway to Jewel Resorts, on site booking with assistance from Jamaica Travel Specialist agents Stephen Wohl Jr. from All Bright Travel and Diane Fazio of Dream Vacations Travel.
- ***Los Angeles Travel & Adventure Show, Long Beach, CA*** – February 8-9, 2014. Largest travel show in the Western USA. The show had a record attendance of over 33,000 visitors. One of our top 50 Jamaica Travel Specialists (Sharon Campbell of Weddings & Honeymoons Travel Group) and one of her agents were on hand to assist with answering questions about the destination. Agent also provided a 5-night prize giveaway to Sunset at the Oasis. Special guest at the booth on Sunday was Daniel Marley, son of six-time Grammy Award winner, Ziggy Marley. He was there to entertain visitors with his songs, to speak with them and for photo opportunities. A step & repeat banner with the new Get All Right tagline was the backdrop in the booth.

- ***The New York Times Show, New York City, NY***, February 28 – March 2, 2014. This event represented a great opportunity to showcase the Jamaican tourism product at the largest consumer travel show in the US. It has always been an excellent forum for creating and maintaining consumer awareness for brand Jamaica. With support from industry partners The Jewel Resorts, Sunset Resorts, Holiday Inn, Half Moon & Mystic Mountain who promoted their product offerings, as well as a Jamaica Travel Specialist (on Saturday & Sunday) who promoted discounted rates for travel to Jamaica, offering incentives to clients booking with them over the upcoming week. Destination Jamaica was showcased over this 3-day event. This was enhanced by a taste of Jamaica, in the form of two-hour Blue Mountain coffee service provided on Saturday and Sunday by Xaymaca Coffee (David Levy). Competing destinations included Anguilla, Aruba, Barbados, Cayman Islands, Curacao, DR, St. Lucia, Mexico, The Bahamas, Puerto Rico, St. Kitts & Nevis, Turks & Caicos, and US Virgin Islands.

- ***AAA Southern New England Travel Show, Foxborough, MA***, March 7-9 2014. This annual event attracts a large number of AAA members eager to book travel at the AAA discounted rate. Travel Impressions had reservations agents & AAA Travel agents on hand to do on site bookings.

Consumer Shows

Over 550,000 consumers experienced Jamaica's tourism product offering through music food and literature distribution at some 86 events. These activities included the Diaspora events.

Bridal Shows

- JTB continued to aggressively reach the Destination Wedding/Honeymoon market which is said to be the most recession-proof. Over 16,000 brides-to-be were provided with information on Jamaica's destination wedding/honeymoon product.

Webinars

- Webinars are now included as a mode of interaction with the travel agents which has proven to be very effective in reaching agents who do not normally attend trade shows or seminars.

Diaspora Events

- The Diaspora remains a very important niche and the JTB continued to support and sponsor this market.

LATIN AMERICA

The Jamaica Tourist Board has been represented in the Latin American region, since April 2002, by **Global Marketing & Sales, Inc.**, (GMS) led by its President, Mr. Alex Pace. Following on a tender/procurement process undertaken in 2008 in accordance with Government regulations, Global Marketing and Sales, Inc. was re-appointed as the JTB's marketing representation Agency for Latin America for the three-year period September 1, 2008 to August 31, 2011. Having obtained permission for an extension to the contract, another tender/procurement process conducted in 2011/2012 resulted in the re-appointment of Global Marketing & Sales, Inc. for the five-year 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, Colombia, Chile, Venezuela and Argentina
- Secondary markets: Brazil, Peru, Panama and Costa Rica

Among the activities conducted during 2010/11 were **seminars, trade shows and familiarization trips**. We also participated in the following:

WTM Latin America, Sao Paulo, Brazil, April 22-24, 2013

- JTB Latin America team actively participated at WTM Latin America attending meetings with Braztoa members, Gol Airlines executives and directors, MMT Gapnet and ADV Tour executives interested in working with Jamaica; promoting the island's product offerings, marketing tools and increased awareness for the destination.

The event was an excellent opportunity to engage and develop new strategies with the travel trade participants. Besides the meeting listed above, several B2B meetings were held during the 2 days of WTM Latin America.

FIT 2013, Buenos Aires, Argentina, September 14-17, 2013

- JTB participated at the 2013 FIT show in Argentina. Jamaica representatives attended during the 4 days open for both consumer and trade. Fit America Latina is one of the leading trade shows pertaining to the sector of travel and tourism. This event allows the companies operating in this sector to display their products in front of a large number of visitors. The gathering of a large number of companies under the same roof creates an opportunity for business networking. Since most of the professionals coming to this event are the decision makers of their company, the exhibitors get a huge business

opportunity. The visitors get a chance to learn about this sector through the various seminars and conferences that take place in this trade show.

JTB Sales Mission, Medellin, Cali & Bogota, COLOMBIA, September 23-27, 2013

- JTB's Sales Mission in Colombia took place in Medellin, Cali and Bogota from September 23 to the 27. The goal of the sales mission was to showcase Jamaica to the country's leading travel professionals while increasing enthusiasm, new distribution points, and sales for buyers and sellers. Some 358 tour operators, travel agents and press attend in total.

La Cita, Ft. Lauderdale, FL – September 30 – October 2, 2013

- Jamaica Tourist Board Latin America had an active and important presence in the first annual La Cita de las Americas, a new travel trade show and business exchange. The show afforded the JTB multiple networking opportunities with travel industry buyers, suppliers, media and related service providers. The Jamaica team met with same to further relationships and build partnerships with the intent of increasing visitation from Latin America. During the three-day event, in which Jamaica had a booth, the JTB conducted key business appointments with key trade and media representatives from Latin America.

ANATO Trade Show, Bogota, Colombia, February 26-28, 2014

- This was an excellent platform for networking and new business opportunities. Over 20,000 visitors (trade and consumers) attended.

CANADA

In 2013, for the eighth consecutive year, the Jamaica Tourist Board's Canadian operation was honoured with the coveted Agents' Choice Award for the Favourite Tourist Board in Canada. Through these same awards, travel agents collectively recognized Jamaica as the Favourite Honeymoon Destination for the fifth consecutive year.

For the reporting period, we secured a good base of groups and built on it through consumer direct initiatives that included radio promotions, social media campaigns and outdoor advertising. To compliment these activities, we also continued to successfully engage our retail travel partners, especially those in the Jamaica Travel Specialist Programme. We ensured that our retail travel partners were trained on how to sell Jamaica and rewarded accordingly.

Travel agents

- Executed successful incentive programs for agents where they won monthly prizes for bookings to Jamaica. This was part of the ongoing Jamaica Travel Specialist Programme.
- Canada produced 18 of the top 50 selling Jamaica Travel Specialists for 2013.
- We participated in over 70 trade shows and engaged 18,995 retail travel professionals
- Fam trips are still very effective. Agents sell what they have experienced. We hosted 285 travel agents on 18 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 agents, e.g. Virtual fam tour group on Facebook.

Consumer Direct

- We participated in over 50 consumer shows and engaged approximately 1.2 million consumers.
- This includes interacting with 70,000 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 2 million consumers.

Diaspora

- Participated in 17 diaspora initiatives across Canada with a direct reach of 20,000 diaspora members.
- Currently negotiating with tour operators to have a Diaspora promotional code for travel in September.

Some of the activities undertaken during 2013/2014 were as outlined below;

Destination Training – College Montmorency	Apr. 17	Montreal	Forty-five (45) graduating students from the travel/tourism program at the college were given an in-depth training on Jamaica.
Launch of the Jamaica Diaspora Conference 2013	April 22	Toronto	The Ministry of Foreign Affairs and Foreign Trade, along with the High Commissioner for Jamaica to Canada, launched the Jamaica Diaspora Conference 2013 in Canada. Hon. Arnaldo Brown, Min. of State, Ministry of Foreign Affairs and Foreign Trade, with responsibility for Diaspora Affairs was in attendance.

Sunwing Product Launch	May 1	Toronto	This tour operator product launch was attended by approximately 500 travel agents .
Jamaica Night with Voyages Hone, St. Jean-de-Matha	May 30	Montreal	A destination presentation made to residents of this village at a fundraising soiree organized by Voyages Hone agency.
ANTOR Press Reception	June 4	Montreal	Jamaica presentation to journalists of various media at the “Thank You Gala” dinner, hosted by Assoc. of Nat. Tourist Offices Representatives.
Thomas Cook Webinar	June 13	National	Montego Bay was the featured destination for this webinar JTB rep. did the presentation with over 36 travel agents participating.
Jamaica Day in the Park	July 6	Montreal	An annual event which reunites the Jamaican community for musical entertainment and a taste of the island. Approximately 3,000 persons attended .
Weekend Reggae, St. Sauveur	July 6-7	St. Sauveur, QC	The village of St-Sauveur for the first time, organized a weekend of Jamaican festivities. They were extremely pleased with the results with more than 3000 persons attending .
Reggae Muskoka Festival	July 6-7	Toronto	A very well attended festival with over 15,000 consumers . Sunset Resorts provided the gate prize for this festival.
Bob Marley Museum One Love Festival	July 6	Kitchener, ON.	A very good event with over 1,000 consumers attending. The Bob Marley exhibit was on loan from the Grammy’s and Kitchener was the only Canadian stop. There were local Caribbean vendors and musicians performed at the event.
MICE Canada Road Show	July 15-19	GTA	A very well executed road show. Twelve Incentive Houses were visited and we met with 32 planners. There was a product update seminar and 14 planner and group specialists attended.
Taste of the Danforth Festival	Aug. 9-11	Ontario	A very successful event. Jamaica gained tremendous exposure. Over one million patrons attended. We got great exposure from the CP24 TV trip give away, featuring the Sandy Haven Hotel.
Canada National Exhibition (CNE)	Aug. 16 – Sept. 2	Ontario	JTB participated in the 135th annual CNE event, with InStyle Travel to follow-up on any leads. In addition to the booth, we had a mini film festival. Jamaica showed Marley. Jamaica got great exposure. Over 20,000 consumers attended over the week.
JTB webinar - French	Sept. 17	National	A total of 126 agents joined in this webinar which was presented in French.
Vancouver Symphony Orchestra Gala & Auction	Oct. 19	Vancouver	This event was very well attended and Jamaica was prominently featured among the patrons.
JTB N. A. Sales Retreat	Dec. 5-7	N.A.	Sales team from North America attended a Sales Retreat in Montego Bay

JTB reception and dinner presentation	Dec. 17	Toronto	Dinner presentation highlighting Kingston & Port Antonio. The tour operator partners with packages to Kingston & Port Antonio (WestJet & Air Canada Vacations) also participated. Approximately 40 travel agents attended the function. It is expected that this presentation will spur growth in the package sales to Kingston and Port Antonio.
Canada's Bridal Show	Jan. 3-5	Toronto	JTB partnered with InStyle Vacations in participation at this show. Over 700 consumers visited the show over the three days. There were many couples planning destination weddings for 2014.
JTB Destination breakfast seminar	Jan. 20	Saskatoon	This destination training seminar for Western Canada agents went very well. Twenty-two agents attended despite the weather condition. This was supported by hotel and tour operator partners.
Destination Presentation to hospitality students	Feb. 4	Toronto	A destination presentation was made to 85 hospitality students at Seneca College.
JTB Canada Team Sales Meeting	Feb. 7	Toronto	The annual sales meeting was held with the PR agency to discuss and finalize the marketing plan for 2014.
Suhaag South Asian Bridal Show	Feb. 16	Miss. ON.	This bridal show was attended by over 2500 patrons . This is the largest South Asian bridal show in Toronto. Absolute Website has exclusivity on this show as its travel agency. Destination Jamaica was showcased very well.

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	5 Fams	66 trade partners (travel agents and tour operators) were hosted across five fam trip visits focusing on luxury and general product, key resort areas and romance. 25 of the agents were TUI top sellers and were jointly hosted by the JTB and TUI.
Trade Seminars	15 events	Over 800 travel agents and wholesale staff across the UK, Ireland and Scandinavia were updated on destination Jamaica. From November 2013, the team introduced the new JTB marketing campaign JAMAICA Get All Right and engaged in Jamaica themed nights as well as tour operator in-house training. We took part in

		several sales blitzes but notably the “Men in Shorts” themed blitz that took place during one the hottest summers in the UK for decades, proved to be a huge success.
Trade Shows	4 events	220,000 visitors World Travel Market - London, UK, IGTM - Spain, MATKA - Finland, FERIE - Denmark, The Wedding Show - Manchester, UK
Tour Operator Launches	2 events	The UK market is now less driven by trade or brochures launches to consumers. The JTB did however launch the Jamaica GET ALL RIGHT campaign at WTM in November 2013 and worked with Thomson Cruise on the “Dream Runner” film that launched the home porting of Thomson Dream in Montego Bay for winter 2014/15
Product Launches	2 launches	<p>The Clipper Round the World Yacht Race 2013-14 once again had a yacht sponsored by Jamaica. Team Jamaica negotiated and spear headed the naming ceremony of the yacht named JAMAICA Get All Right. This project is still ongoing and will conclude in summer 2014 in London, UK after a ten month long race across all oceans and six continents.</p> <p>My Booking Rewards is a travel trade incentive programme that allows suppliers to reward wholesalers and travel agents for bookings completed. These booking are recorded using the MBR platform. It allows the suppliers to recognise the key booking periods, analyse top sellers and target sales when necessary.</p>
Sales Calls	631	Being one sales person down for most of the year, actual sales calls decreased. By embracing Webinars, increasing online initiatives through newsletter frequency as well as social media contacts and updates, we have now attracted the same number of agents as previously.

HIGHLIGHTS

- “Men in Shorts” – South West Sales Blitz to the counties of Devon, Cornwall and Somerset.

- Clipper Round The World Yacht Race 2013-14 (still ongoing)
- JTB Get All Right Campaign launched at WTM 2013.
- MyBooking Rewards launched as a trade incentive to UK travel agents at WTM 2013.

EUROPE (East, West, Central & Southern Europe)

Visitor arrivals from the region increased despite poor economic performances in some countries during 2013. 77,098 tourists arrived on Island in 2013 against 70,995 in 2012. Traditional markets like Germany, the Netherlands, Belgium, Austria and Switzerland performed well while Italy, Spain and Portugal continued to lose market share. We were however fortunate to break into the French, Russian and Czech markets giving us strong increases with the introduction of direct flights.

To support the markets, we continued our participation in all major trade and consumer shows in the region. These included:

- **Germany** - FREE, CMT, ITB
- **Russia** - ITT and ITE
- **France** - Top Resa and ILTM
- **Spain** - FITUR
- **Italy** - TTG, No Frills and BMT
- **Holland** - Vakantiebeurs
- **Belgium** - Vakantie Salon
- **Slovakia** - ITF Slovakiatour
- **Czech Republic** - Holiday World
- **Hungary** - Utazas
- **Poland** - TTWarsaw

We joined our tour operator partners in coop activities in consumer advertising and trade activities. Several travel agents were updated on the destination in all countries.

We supported the destination video done by Jamaica's bobsled athletes while a social media and radio promotion using Bob Marley's 'One Love' was done in Spain.

During the Athletic World Championships in Moscow, Jamaica House was organized at Radio City in Moscow. During the event, travel agents were updated in seminars, media interviews with the Director and Minister, trade partners were hosted during the racing events in which Jamaica took part. Our partners for this event were: Tour Operator – Biblio Globus, Campari –

Appleton and Sandals Resorts. The athletes and some Jamaican supporters attended on the final night. The JTB was supported by the Jamaican students studying at the Universities in Moscow.

Air Lift

Flights for 2013 operated from: Moscow, Prague, Milan, Paris, Amsterdam, Brussels, Lisbon, Frankfurt and Munich.

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 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 |

GROUPS AND CONVENTIONS / INCENTIVES

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.

Among the major activities in which the department participated for the period under review were:

Meetings, Incentives, Corporate & Events (MICE), Atlanta, GA - April 16, 2013

- Jamaica Tourist Board and representatives from Half Moon, Iberostar, Palladium, Jewels, Riu, Sandals and Secrets Resorts hosted an evening for the Atlanta meeting planners at the Phillips arena, downtown Atlanta, Georgia. There were approximately 20 planners. Format of the evening was a brief presentation followed by the basketball game (Atlanta Hawks vs Toronto Raptors). The evening was a success and we received 4 leads from planners looking at Jamaica. Working with these planners to secure proposals from the hoteliers and arranging site inspection for the month of May. Most of the leads received were for 2014.

Helmsbriscoe Destination Partnership Program, Orlando, FL– April 17-19, 2013

- Regional Director, Groups & Conventions represented Jamaica at the Helms Briscoe event in Orlando. The programme is designed to keep one front of mind with Helmsbriscoe associates as well as access to special Helms Briscoe event and HB teams. There was great interest in the Destination.

Meeting & Incentive USA, West Palm Beach, FL – May 28-June 1, 2013

- Jamaica Tourist Board participated in the 2-day forum at the Breakers hotel in West Palm Beach. The forum enables suppliers to meet the world's most elite buyers in a professional, productive environment. The show was a success and there was great interest in Jamaica. Leads received were being followed up to be converted into definite business.

The Americas Incentive Business Travel & Meetings Exhibition, Chicago, IL – June 11-13, 2013

- AIBTM is a leading global exhibition for the US buyers and events industry. The show is an appointment-based event. It delivers individually qualified hosted buyers and eligible trade buyers from the U.S. and around the world. This event is tailored to the U.S. Market, and serves and guarantees the attendance of top-level decision makers.

Incentive Travel Exchange, Las Vegas, NV – June 24-28, 2013

- The annual event held June 24-28 at THEhotel at Mandalay Bay in Las Vegas in partnership with SITE, a global network of meeting and event professionals. The event brought together prequalified, top producing incentive buyers and global suppliers of incentive travel for two (2) days of prearranged meetings and high-caliber networking.

IAGTO North America, Naples, FL – June 26-29, 2013

- Deputy Director of Tourism participated in the 5th IAGTO North America Golf Tourism Convention held at the Marco Island Marriott Resort, Golf Club & Spa, Marco Island, Florida from June 26-29, 2013. More than 100 golf tour operators selling North America were in attendance at the Convention with some 25% from the USA & Canada, and the remainder from more than 20 different countries all with North American golf programs.

Connect Marketplace, Milwaukee, WI – August 22-24, 2013

- Appointment-based reverse trade event for the SMERF market. Well attended. Great leads from appointments and networking sessions. Great exposure to new associations. Leads have been forwarded to industry partners.

Caribbean Meeting & Incentive Travel Exchange (CMITE), Atlantis Paradise Island Bahamas, September 15-18, 2013

- The Event is an invitation only appointment based event. The Exchange brought together buyers and suppliers servicing the Caribbean meeting and incentive market.

Religious Conference Management Association (RCMA) EMERGE, Sacramento, CA – February 3-7, 2014

- The Religious Conference Management Association is a professional nonprofit multi-faith organization consisting of individuals who are responsible for planning and/or managing meetings, conferences, conventions and assemblies for their religious organizations. Representatives from the groups department participated with a Jamaica booth at the RCMA/EMERGE 2014 conference in Sacramento, California. Participating in the Jamaica booth were representatives from Sunset Jamaica Grande, Holiday Inn Resort and Jewels Resorts. For the first time, appointments were confirmed and taken in the booth. Jamaica received approximately 25 leads, 10 of which the department is presently working with the planners on RFPs for the destination, for 2015 and 2016.

PERFORMANCE IN THE MARKETPLACE

UNITED STATES

The U.S. economy grew by 1.9% in 2013 (that is, from the 2012 annual level to the 2013 annual level), compared with an increase of 2.8% in 2012.¹ Travel by 29 million US citizens during 2013 to overseas regions indicates that outbound travel from the USA increased by 1.8% over outbound travel during the corresponding period in 2012. Travel to the Caribbean region increased by 1.7% during this period also, reflecting a market share of 22.6% of the USA outbound travel market. Of the 61.6 million total outbound travelers for 2013, 32.5 million traveled to Canada and Mexico.²

With regard to Jamaica, during the winter season, stopover arrivals in 2013 were 0.5% lower than those in 2012 and 3.0% lower than in 2010. In comparison to 2012, stopover arrivals in the 2013 winter season from the Northeastern, Midwestern and Southern regions decreased by 0.8%, 0.3%, and 0.3%, respectively. The Western region of the U.S. was the only region to grow during this period by 4.1% with 34,345 visitors.

For the summer period (May – Dec.), the US market grew by 1.7% compared to 2012 and rose 5.1% over 2010 stopover arrivals. Summer arrivals in 2013 were 857,394. In 2011, 843,206 stopover arrivals came during summer and in 2010, 815,623 stopover arrivals visited. Stopover arrivals from the Midwest, West, and Northeast regions grew by 6.8%, 5.0%, and 1.0%. The Southern US region was the only region to record a decline in arrivals by 1.4% with 233,874 visitors.

The Northeastern and Southern regions contributed 70.4% of the U.S. stopover visitors to Jamaica during 2013. This represents 0.9 percentage points less than its contribution in 2012. The Midwest region contributed 19.1% of the stopover arrivals and 10.5% of the stopover visitors came from the Western region. The Northeast market region with 570,555 arrivals was flat, with a 0.4% change, the South with 324,719 arrivals decreased by 1.1%, the Midwest with 242,499 grew by 3.8%, and the Western region with 133,539 grew by 4.8%. Overall, arrivals from the USA market increased 1.1% in 2013 with 1,271,262 over the 1,257,669 stopovers in

¹ Bureau of Economic Analysis, U.S Department of Commerce - News Release – April, 2014

² U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries “U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico February, 2014”

2012. This performance was 3.7% more arrivals than the 1,225,565 arrivals recorded in 2011 and 2.3% more than the 1,242,943 in 2010.

USA Visitor Summary

- The average length of stay for Foreign Nationals US visitors in 2013 was 7.6 nights, which is lower than the average of 8.7 nights for all visitors.
- In 2013 a total of 1,031,226 or 81.1% of US visitors came to Jamaica for leisure, recreation and holiday, 109,554 or 8.6% came to visit friends & relatives, 49,487 or 3.9% on business and 80,995 or 6.4% for other/not stated purposes.
- The annual average growth rate for visitors from the USA over the past five years from 2009 to 2013 was 2.0%.
- In 2013 the age distribution of US stopover visitors indicated that 10.7% were aged less than 18 years, 7.3% were between 18 and 24 years, 50.1% were between 25 and 49 years, 24.2% were between 50 and 64 years and 7.7% were over 64 years.
- The Gender mix of visitors from USA, was 574,182 males (45.2%) and 697,080 females (54.8%). The gender ratio of visitors from the USA is 121 females per 100 males.
- The peak periods of US stopover visitors to Jamaica in 2013 were: Summer (June – July), Easter (March – April) and Christmas (December). The months with the highest numbers of stopover arrivals in 2013, in descending order, were: July, June, March, December and August. This pattern has been holding strong for the past three years (2011 – 2013).
- The most popular resort region to which US stopover visitors stayed in 2013 was Montego Bay with 422,545 or 33.2% of US visitors. 21.6% or 274,131 of the US visitors stayed in Ocho Rios and 20.7% or 262,299 stayed in Negril.

CANADA

Canada's economic activity expanded 2013 with GDP at constant prices growing by 2.0% after increasing by 1.7% in 2012³. Outbound trips reached an estimated 32.977 million in 2013⁴. Arrivals from Canada in 2013 totaled 399,331 representing 3,869 less Canadian visitors to Jamaica than in 2012, a 1.0% decrease.

³ Statistics Canada, Industry Accounts Division (February 2014). Canadian Economic Accounts Quarterly Review, Vol. III, no 2

⁴ Canadian Tourism Commission (December 2013). Tourism Snapshot: A focus on the markets that the CTC and its partners are active Vol, 9, Issue 12

The Canadian market contracted during the (January – April) winter period, declining by 10.8%. During this period Jamaica lost over 40,000 airseats out of the Canadian market region as a result of Thomas Cook's removal of Sunquest Vacations from the market. A total of 188,989 stopovers came from that market compared to 211,925 in winter 2012, this is 22,936 less visitors. All four months of winter recorded decreases: January (-14.5%), February (16.3%), March (6.4%) and April (4.5%).

This trend was turned around during the summer; although all lost seats were not brought back, increased frequency and capacity from airlines Sunwing and Westjet improved the availability of airlift to Jamaica. A 10.0% increase was recorded for the May – December summer period, with a total of 210,342 stopovers arrivals compared to the 191,275 arrivals in summer 2012. The following months recorded double digit percentage change in arrivals: August (10.4%), September (11.3%), October (14.9) and November (21.4%).

The main province of Ontario contributed 255,407 or 64.0% of stopover arrivals to the Canadian total, an increase of 1.2% over the 252,495 who came from that province in 2012. Quebec, the second leading visitor producing province, (with 13.7% of the visitors), produced 1.8% less stopovers. The other two leading provinces Alberta and Saskatchewan recorded mixed results. Alberta increased by 2.0%, while Saskatchewan declined by 24.4% in 2013 compared to 2012.

Canada Visitor Summary

- The average length of stay for Foreign National Canadian visitors in 2013 was 8.8 nights.
- In 2013 a total of 348,785 or 87.3% of Canadian visitors came to Jamaica for leisure, recreation and holiday, 25,814 or 6.5% came to visit friends & relatives, 10,017 or 2.5% came on business, and 14,715 or 3.7% came for unstated purposes.
- The annual average growth rate for visitors from the Canada region over the past five years from 2009 to 2013 was 8.3%.
- In 2013 the age distribution shows 11.9% were aged under 18 years, 6.7% were between 18 – 24 years, 47.8% were between 25 – 49 years, 26.1% were between 50 – 64 years and 7.6% were 65 and over.

- The Gender mix of visitors from Canada, was 183,611 males (46.0%) and 215,720 females (54.0%). The gender ratio of visitors from Canada is 117 females per 100 males.
- January through March and December are the peak months for visitor arrivals from Canada in 2013. This coincides with the cold winter climate experienced in Canada during this period.
- The most popular resort regions to which Canadian visitors stayed in 2013 was Ocho Rios with a total of 133,906 or 33.5% of Canadian visitors. 29.8% or 119,039 Canadian visitors stayed in Montego Bay and another 21.0% or 83,704 stayed in Negril.

United Kingdom/Europe

The number of visits abroad by UK residents grew by 3.5% in 2013 from 56.5 million in 2012 to 58.5 million. This growth occurred in relation to visits to Europe rose by 3.9%, while visit to North America were flat (0.7%) and Other Countries rose by 2.7%.⁵

Stopover arrivals to Jamaica out of the European region recorded positive growth in 2013. Arrivals from Europe increased by 6.0% in 2013, moving from 222,428 arrivals in 2012 to 235,811 arrivals in 2013. The United Kingdom, Germany, Russia and France are the most important visitor producing countries within this regional market, in descending order of importance.

United Kingdom Visitor Summary

- The United Kingdom, with 151,315 stopover arrivals, registered an increase of 4.2% over the 145,231 recorded in 2012. This is still below the highest level of visitors from the UK in 2008 when 188,436 were recorded. The performance for winter was down by 8.2%, this trend was reversed in the summer with an increase of 10.3%.
- The average length of stay for Foreign Nationals UK visitors in 2013 was 15.2 nights, which is higher than the average of 8.7 nights for all visitors.
- In 2013, a total of 104,969 or 69.4% of UK visitors visited Jamaica for leisure, recreation and holiday, 26,760 or 17.7% visited friends & relatives, 9,320 or 6.2% came on business, and 10,266 or 6.8% visited for unstated purposes.

⁵ UK National Statistics – Travel Trends -2013, May 2014

- The annual average growth rate for visitors from the United Kingdom over the past five years from 2009 to 2013 was negative 4.8%.
- In 2013, the age distribution shows 12.7% were aged under 18 years, 6.8% were between 18 – 24 years, 44.5% were between 25 – 49 years, 26.6% were between 50 – 64 years and 9.5% were 65 and over.
- The Gender mix of visitors from UK, was 68,651 males (45.4%) and 82,664 females (54.6%). The gender ratio of visitors from the United Kingdom is 120 females per 100 males.
- July, August and December were the peak months for visitor arrivals from UK in 2013 with August being the highest month with 15,271 visitors.

Continental Europe

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 19,658 stopover arrivals in 2013, the German market fell 2.9% over the 20,236 recorded in 2012. This 54.3% below the peak of 43,018 German visitors recorded in 1998.

During 2013 Russia became the second main visitor producing country from Continental Europe recording an outstanding increase of 622.3%, this represented 12,286 stopover arrivals. This performance occurred mainly due to the year round airline operations of Transaero out of Moscow. The winter season posted a growth of 455.8% with 4,035 stopover arrivals compared to 726 in 2012. This positive trend was widened during the summer months recording an increase of 746.3% with 8,251 stopover arrivals compared to 975 in 2012.

France recorded growth in 2013 of 30.6% with 12,087 stopovers against the 9,253 recorded in 2012. The main contributing factor to this significant growth in 2013 was the chartered service operation during the winter months by the tour operator Look Voyage. During this period visitor arrivals from France of 8,367 grew by 37.4% compared to the 6,089 arrivals during the same period in 2012.

The performances of the following European countries, albeit small numbers, recorded mixed growth in 2013 compared to the corresponding period in 2012;

- | | | |
|------------------|------------------|---------------------------|
| ● Sweden 56.2%; | ● Italy -19.3%; | ● Czech Republic 97.4%; |
| ● Spain -40.9%; | ● Austria -8.5%. | ● The Netherlands -17.9%; |
| ● Belgium -3.7%; | ● Norway 12.5%; | ● Switzerland 0.6.9%. |

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 grew by 22.09% moving from 25,037 in 2012 to 30,538 in 2013. This notable performance was also aided by the relaxation of Visa requirements of many of the Latin American countries for entry into Jamaica.

Of the top three visitor-producing countries in the South American sub-region, Chile with 5,005 visitors increased by 37.0%; Argentina with 4,625 visitors increased by 23.7%; and Colombia with 3,625 decreased by 10.8%;

From the Central American sub-region, Costa Rica with 3,018 increased by 127.3%; Mexico with 2,767 increased by 18.3%; and Panama with 2,135 increased by 32.6%.

Caribbean

Arrivals from Caribbean territories to Jamaica declined again for the third year in a row, moving from 64,984 visitors in 2012 to the 58,249 in 2013. This was a decline of 10.4% over the same period in 2012.

The Cayman Islands, with 16,234 stopovers, Trinidad and Tobago with 11,437, The Bahamas with 5,216 and Barbados with 4,439, continued to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 37,326 stopovers or 64.1% of the total Caribbean arrivals.

Other Countries

Australia, China, Japan and India are the main visitor producing countries from other parts of the World. When compared to 2012, Australia, with 2,462 stopovers grew by 9.2%, China with 2,420 was up 15.1%, Japan with 2,177 was up 4.1% and India with 1,567 rose by 14.0%.

CRUISE PASSENGERS

According to the Florida-Caribbean Cruise Association (FCCA), 21.3 million passengers cruised the seas in 2013, up 6.0% from the 20.3 million passengers in 2012, with 17.6 million originating in North America. In 2013 the growth of the cruise industry continued with thirteen new ships to sail the world's waters for the first time, ranging in guest capacities of 60 to 3,690 passengers totaling 14,887 new beds at double occupancy.

The current cruise ship order book extending through 2016 includes 34 new builds, with over 60,000 berths at a value of nearly \$14 billion.⁶

The Caribbean continues to lead as the number one cruise destination, accounting for 37.3% of all itineraries. The passenger numbers for the Caribbean continues to be consistent and high, despite other rising cruise destinations.

Jamaica recorded over a million cruise passengers during 2013. This total of 1,265,268 cruise passengers who visited our shores was a 4.2% decrease over the 1,320,083 recorded for the corresponding period in 2012. Seasonally, cruise arrivals recorded a decrease of 6.8% in the winter period (January to April) with 568,072 cruise passengers, down from the 609,301 for 2012. During the summer period (May to December), this negative trend was reduced, recording a decline of 1.9% with 697,196 passengers.

The port of Falmouth contributed 646,436 cruise ship passengers or 51.1% of total passengers to Jamaica from 154 cruise ship calls. The port of Ocho Rios, which in the past provided the largest share of Jamaica's cruise arrivals, accounted for 380,976 or 30.1% of the 1,265,268 who arrived at our shores in 2013. The port of Montego Bay accounted for 237,956 passengers or 18.8%.

The cruise ships carrying the most passengers to Jamaica in 2013 were *Oasis of the Seas* and *Allure of the Seas*, of the Royal Caribbean Cruise. The *Oasis of the Seas* made 26 calls to the Port of Falmouth with 155,707 passengers. The *Allure of the Seas* made 25 cruise ship calls also to the Port of Falmouth, and provided 149,508 cruise passengers.

⁶ Source: Florida-Caribbean Cruise Association – Cruise Industry Overview 2014

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 Destination Marketing Unit of this department provided all on-island support for overseas press groups (print and electronic), radio remotes, trade shows, international events (including sporting activities), conferences and festivals. 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 three hundred and nine (309) press releases were distributed through our public relations agencies out of Germany, India, China, Japan, North America, Latin America, Canada and Mainland Europe. The releases were shared with media houses and freelance journalists in order to provide additional coverage.

- 2013 April – June: *76 press releases*
- 2013 July – September: *85 press releases*
- 2013 October – December: *69 press releases*
- 2014 January – March: *79 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 seventy two (72) press trips were managed through the marketing communications unit. These press trips included journalists out of US, Latin America, Canada, United Kingdom, Russia, Czech Republic, Switzerland, Germany, France, Spain and Europe

- 2013 April – June: *24 press trips*
- 2013 July – September: *19 press trips*
- 2013 October – December: *14 press trips*
- 2014 January – March: *15 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 (14) press trips.

- Reggae Sunfest Media Trip
- Jamaica Bridal Expo Media Trip
- Reggae Marathon Media Trip
- Jamaica Product Exchange (JAPEX) Media Trip
- Rebel Salute Media Trip
- Jamaica Jazz & Blues Festival Media Trip
- Kingston City Run Media Trip
- Caribbean Travel Marketplace Media Trip
- Calabash Media Trip
- MoBay City Run Media Trip
- Carnival in Jamaica × 2
- Diaspora Conference Media Trip
- Annie's Revenge

Other projects:

A total of twenty (12) 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.

- Trailstream (2013 March 4 – 16)
Tour operator programme commissioned by UK tour operators Carrier, Kuoni and Virgin Holidays to gather video content from 18 hotels. 2 persons out of UK
- Launch of Experience Jamaica Campaign: (2013 March 17 – December 15).
Launched on 2013 March 17 at Emancipation Park. Domestic sales campaign aimed at encouraging persons living in Jamaica to use the tourism offerings available in Jamaica.
- Norman Manley International Airport Staff Product Orientation (2013 July 22 – 24 & July 29 – August 31). *Familiarization tours for NMIA staff*
- WPAT 930 AM Drive Time and Come Along (2013 September 19 – 23).
Live broadcast from Sunset Jamaica Grande
- German Tour Operator Fam (2013 September 25 – October 2)
14 Tour Operators

- JTB/JHTA Social Media Workshop (2013 October 7 -8)
- Jamaica Bridal Expo (2013 October 19 – 20)
- Dreamliner Inaugural Flight (2013 November 7 – 8)
- Delta Airlines Travel Agents Briefing (2013 November 13)
- Fiona Anderson Immersion Trip (2013 December 6 - 11)
PR Representative from McCluskey International
- Industry activity at Norman Manley International Airport (2013 December 19)
Annual appreciation event
- Launch of Experience Jamaica (2014 April 4)
Event executed during the Jamaica Exporters Association and the Jamaica Manufacturers Association event; Expo Jamaica at the National Arena

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 developed for executives of JTB to participate and support several events:

Messages	TOTAL: 24 <i>Breakdown:</i> April – June (6) January – March (6)
Speeches	TOTAL: 14 <i>Breakdown:</i> April – June (1) July – September (7) January – March (3)
Editorial Content	<ul style="list-style-type: none"> - Bi-Weekly editorial content for Hospitality Jamaica publication. - Two supplements during the period 2013 April – June resulting from Experience Jamaica activities.
Fact Checking	<ul style="list-style-type: none"> - 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

The use of social media has been recognized as one of the main tools for consumer and business engagement. Marketo in its study *Social Media for Lead Generation* quotes a Forrester survey which found that:

“only 20% of buyers believe what a brand says about itself, because people view any brand-to-buyer communication as an advertisement. Conversely, 70% of buyers trust the recommendations of their friends and family”.

The primary driver of this shift from business to peer recommendations is social media, and the space when properly handled, provides an active arena to communicate with the marketplace. The growth in the activity and reach, which have largely been organic, have been testament to the efforts of the team and the fans/friends of Jamaica.

At the end of the 2013-2014 financial year, the assets of the JTB, managed by the Website/E-Commerce Unit were:

Website: comprehensive brochure site with images, video, travel booking facilities and articles for all things Jamaican:

§ www.visitjamaica.com

Facebook: sharing activities, images and ideas that are positive about Jamaica

§ www.facebook.com/visitjamaica

§ www.facebook.com/jamaicajerktrail

YouTube: full videos with content about Jamaican life, music, events and activities

🔗 www.youtube.com/aboutjamaicajtb.com,

🔗 www.youtube.com/myjamaicajtb.com,

🔗 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: images and other visual content which reflect the beauty of Jamaica from its people to its scenery and culture

- www.pinterest.com/myjamaica

Instagram: image sharing site hosting images and videos highlighting the destination

- www.instagram.com/visitjamaica

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

- § www.islandbuzzjamaica.com

The growing significance of social media means that the work of the Website/E-commerce unit must be infused into the overall marketing of the destination. There was strong emphasis on Jamaica's culture through cuisine and music.

The marketing efforts supported by the Unit included:

- ② Special Projects particularly the Island Potluck Sisters which was done in collaboration with Michelle & Suzanne Rousseau (Two Sisters and A Meal). The JTB received 12 episodes of the pilot series which are housed on our YouTube Channel and promoted through the social media handles. The series was to help capitalize on the growing trend in exotic foods, elevate the cuisine of Jamaica, showcase the variety of Jamaican foods and highlight new ways in which they could be prepared and enjoyed.
- Media centric opportunities: cover trips for media, bloggers and photoshoots where participants were encouraged to share their experiences with the JTB via their preferred social media platform. Where appropriate, the unit shared/retweeted/reposted their comments/images with the wider community audiences.
- ② Event Support, where members of the team were dispatched to cover major events sponsored by the JTB: Rebel Salute, Jamaica Jazz & Blues, Kingston City Run, Experience Jamaica, Caribbean Premier League (CPL-T20) and Jamaica Premier League (JPL) Cricket events, Jamaica Bridal Expo, Reggae Sumfest, Jamaica Pro-Am "Annie's Revenge" Golf Tournament, the visit of the Clipper Round the World Yacht Race, Soul in the Sun Music Festival and Reggae Marathon.
- ② Online chats, competitions, trivia and give-aways were used to heighten awareness of events and significant activities in the markets. A music Twitter Chat was held with the assistance of Shaggy in October 2013 and the team participated in the Diaspora activities in support of Tessanne Chin on The Voice. A Twitter chat as well as other giveaways were part of the support for Jamaica Bridal Expo.

- ☐ The redesign of the website www.visitjamaica.com continued. The team continues its outreach to stakeholders for fresh and current content (text and images) for this “new” space.
- ☐ Stakeholder education through marketing workshops/seminars. Two seminars were held in Montego Bay and Ocho Rios in October 2013. These seminars focused on providing middle to upper-level managers with information on media relations, crisis management and social media marketing.

The team will continue with its core focus of consumer engagement as well as place greater emphasis on:

- ☐ Researching unique elements of the destination and acquiring new content which can be shared across multiple media
- ☐ Working with the website redesign project to provide associated content, training and outreach to the stakeholders.
- ☐ Monitoring concerns and integrating analytics into the work of the unit

These efforts will continue in the work of the Unit, effectively using social media to keep Jamaica top of mind, as the premier Caribbean destination. Through these channels and the outlined objectives, the Unit can better assess the response of consumers to the overall JTB’s Marketing plan and connect with online users to drive conversions and sales.

TOURISM AWARENESS

The Tourism Awareness Unit had a very productive year. The interest from the public to learn more about tourism is quite significant and the unit saw strong requests for us to visit and educate persons on a wide variety of tourism topics. Strong PR activities from the Ministry and its agencies continued to stimulate strong interest which is very evident in all these requests. Generally speaking, the desire on the ground to pursue a career in hospitality and tourism continues to see steady increase. Persons of all ages inquire about these opportunities and we have also noted many adults considering even changing their career paths to tourism given the perception of tourism as a very strong and rapidly developing industry. In response to this, the unit facilitated numerous careers in tourism presentations and exhibitions which required constant replenishing of our information brochures.

The Tourism Action Club (TAC) continued to remain strong with very strong interest and leadership especially from students in the upper high school years and our tertiary members. Our facebook page continued to be a very effective method of educating our students and sharing information quickly on developments and opportunities in the industry. A high percentage of our members actually pursued their tertiary studies in hospitality and tourism management with some of them even returning to the JTB for internship after years of being members. Other TAC members actively sought to be a part of the TEF and TPDCo summer internship program for young Jamaicans. It is always a highlight moment for the unit to observe our interaction with the students from high school all the way to employment in the industry.

Another highlight moment for the unit in 2013 was having Jamaica place 1st in the Junior Division of the FCCA Poster Competition.

The unit also played an active role in special projects such as the Tourism Outlook Seminar, Community Tourism planning committee, World Tourism Day and Tourism Awareness Week activities.

The Jamaica Tourist Board Library

A unit within the Marketing Department, it provides primarily for the information needs of the Board and is the recognized tourism information source for local and international tourism researchers. As such, the unit continues to hold as its mission managing access to collections of relevant, current information sources, necessary to support the organization in the achievement of its goals and objectives, and to facilitate researchers of the tourism trade.

The library attempts to succeed at this mission primarily through:

- The provision and maintenance of access to timely, relevant in-house collections of information resources in all formats,
- efficient access to remote electronic information resources, such as on-line databases, repositories and electronic publications;
- provision of support required by staff in fulfilling the organization's goals; and
- the provision of appropriate services to students, researchers of the trade and the wider global society.

The library maintains an electronic portal on Tourism Information Publishing Site (TIPS), providing access to many of its databases.

Core function and activities:

Acquisition and Access

Over the period the unit continued to provide access to information sources relevant to the activities of the board and the needs of partners and researchers through face-to-face interactions and electronic means including the listing below.

- **Jamaica Collection** - the Jamaica collection consists of the catalogue entries held as far back as 1982.
- **Social and Economic Information Network- SECIN database** - This portal is a collaboration by all Special Libraries within the network and comprises social and economic content held by over seventy units within the government and private sectors of Jamaica.
- **Media Clippings On-line**- updated daily, provides full text access to over 4000 articles primarily from the two major newspapers
- **Image Library** - collection of over 400 high resolution images representative of the tourism product throughout the island.
- **UNWTO E-Library** - the E-UNWTO is a fully cross-searchable interactive database offering a vast number of high-quality UNWTO publications including books, journals, and statistics.

Image Management

The unit carried on the functions to ensure collections of images was maintained to satisfy the information and communication needs of the Board. One key activity was the creation of catalogues and classification for images captured over the period to reflect the diversity of subjects included and to ensure metadata would allow updates to be hosted on TIPS.

Conversion, preservation

The collections were audited and assessments and transfer of relevant items were done to requisite national collections. The library liaised with external entities to share equipment use time, necessary carryout VHS video transfer processes, and research, collection and preservation of materials produced by the Jamaica Tourist Board.

Research and Exhibitions

The unit developed displays sharable to JTB offices globally featuring tourism related events for the period. These included displays surrounding Independence themes of World Tourism Day, Charismas and the start of the winter tourism season. These were done as electronic and

physical displays as necessary to educate and inform members of the organizations, researchers and partners.

Technical Services

Application of current library and information techniques necessary for efficient use of information sources, information literacy guidance and provision of access to sources held in remote collections.

Records and Information Management

Provided support to the Administration Department in the development and maintenance of systems necessary for effective business record creation, management and protection for the organization.

Over the period, the unit added over one thousand eight hundred articles to its full text collections, responded to over five hundred research queries, provided over one thousand image copies to partners. New equipment acquired by the unit will see improved conversion rates and this coupled with wider local and international relationships will increase numbers added to the collections.

RESEARCH & MARKET INTELLIGENCE

The objective of this unit, which falls within the Marketing Department, is to conduct research and provide statistical data on a timely basis to inform and facilitate strategic management, planning and decision making, as well as to assess the visitors' level of satisfaction with their trip and to gather market information. Appendix I is 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 role as lead agency responsible for marketing Jamaica as a cruise destination, the modality of this and funding to be worked out with Port Authority of Jamaica. Interagency collaboration and communication on all cruise related matters to be strengthened. Presently, PAJ to pay portion of collected “passenger user fees”, formerly head tax, to TEF to fund cruise marketing activities.

EVENTS:

Events continued 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”:

■ CULTURAL:

- Bacchanal Jamaica Road March, April 7, Kingston
- 1st African American Women in Cinema Jamaica Film Festival, April 14–15, Kingston.
CANCELLED
- Liguanea Art Festival, April 21, Kingston
- Imagine, May 10–12 & May 17–19, Kingston
- Jamaica International Ocho Rios Jazz Festival, June 8-16, Kingston & Ocho Rios, St. Ann
- Mystic Fantasies, June 29, Ocho Rios, St. Ann
- International Reggae Day, July 1, Kingston
- Reggae Sumfest, July 20-27, Montego Bay, St. James
- Jamaica International Reggae Film & Music Series, August 1-5, Kingston
- Denbigh Agri-Industrial Show, August 4-6, May Pen, Clarendon
- Merritone Homecoming & Family Reunion, October 16-20, Kingston & Montego Bay, St. James
- Beach Volleyball Party (BVP) Weekend, October 18-21, Negril, Westmoreland
- Reggae Fever, November 30, Puerto Seco Beach, St. Ann
- STING, December 26, Kingston
- Rebel Salute, January 17-18, Richmond Estate, St. Ann
- Jamaica Jazz & Blues Festival, January 30 – February 1, Trelawny
- Reggae Month, Feb. 2014, All Island
- Bob Marley Birthday Bash, February 1-6, Negril, Westmoreland
- Alpha Boys Live, February (every Friday), Kingston
- 12 Tribes of Israel Foundation Anniversary, February 25, Kingston
- Bacchanal / Jamaica Carnival in Jamaica, March 7-April 2014, Kingston
- Earth Hour Concert, March 27, Kingston

■ SPORTS:

- Tri-Nation Cricket Tour: JTB/British Airways Mound, June 28, 30 & July 2, Kingston
- Caribbean Premier League (CPL) T20 Tournament, August 17, 18, 22 & 23, Kingston
- Michael Holding's Masters Cricket Tournament, October 24-November, All Island
- Annie's Revenge, November 13-17, Montego Bay, St. James

■ ADVENTURE SPORTS:

- Jamaica International Kite Festival, April 1, Seville Heritage Park, St. Ann
- Makka Pro Surf Contest, July 19-21, Yallahs, St. Thomas
- Pagee Fisherman Regatta, August 7, Port Maria, St. Mary
- 50th Port Antonio International Marlin Tournament, Oct. 5-12, Port Antonio, Portland
- JMMC All Stages Rally, November 29-December 2, Bog Walk, St. Catherine & Kingston
- Jamaica Fat Tyre Festival, February 15-22, Oracabessa, St. Mary

■ INTRAMURAL SPORTS:

- CARIFTA Swimming & Water Polo Championships, March 30 – April 3, Kingston
- Jamaica Netball Association/ Supreme Ventures Sunshine Series, April 2, 3 & 6, Kingston
- 5th Annual Jamaica International Synchronized Swimming Championships, Oct. 3-5, Kingston
- CONCACAF Women's Under 17 Football Tournament, October 30-November 9, Montego Bay, St. James
- UWI Pelican Invitational Volleyball Tournament, November 15-17, Kingston
- Island Aquatics Synchro Invitational, January 17-19, Kingston
- Venus Volleyball Invitational, March 28-30, Kingston

■ ENDURANCE, HEALTH & WELLNESS:

- RuJohn Foundation – Celebrity Sports Camp, June 23-29, Kingston
- Digicel 5k/ Night Run, October 26, Kingston
- Reggae Marathon & Half Marathon, December 5-7, Negril, Westmoreland
- Kingston City Run, March 7-9, Kingston

■ CULINARY:

- All Jamaica Grill Off, June 9, Kingston
- CB Pan Chicken Series, June 29, August 24, September 28, November 24, Mandeville, Montego Bay, Kingston
- Kingston Kitchen, July 6, August 24, December Kingston
- Portland Jerk Festival, July 7, Portland
- Montego Bay Jerk Festival, August 1, Montego Bay, St. James

- FAITH BASED:
 - Praisefest, April 17-20, Montego Bay, St. James

- HERITAGE:
 - Blue Mountain Experience Series, June 23, July, August 1, October 14, November – Dec., Kingston & Portland
 - Emancipation Jubilee, July 31- August 1, Seville Heritage Park, St. Ann
 - Emancipation Celebration, August 1, Kingston
 - Fi Wi Sinting, February 16, Port Antonio, Portland
 - Misty Bliss/ Blue Mountain Music Festival, February 24, Kingston

- FASHION/ BEAUTY/ LIFESTYLE
 - Styleweek Jamaica, May 22–26, Kingston
 - Caribbean Fashion Week, June 6-10, National Arena, Kingston
 - Miss Jamaica World 2013, July 20, Kingston
 - REVE Wellness, August 10, Kingston
 - The Collection MODA, July 10-13, Kingston
 - Miss Global International, Sept. 26-28, Montego Bay, St. James

- CONFERENCE/ CONVENTION/ EXPO:
 - Jamaica Product Exchange (JAPEX), April 28–30, Montego Bay, St. James
 - The Business of Sport, May 1–2, Kingston
 - Kingston Bridal Week, September 25-29, Kingston
 - Jamaica Bridal Expo, October 19-20, Montego Bay, St. James

- EMANCIPENDENCE & DIASPORA HOMECOMING REUNIONS:
 - Smirnoff Dream Weekend, August 1-6, Negril, Westmoreland
 - SPF Weekend, August 2-6, Ocho Rios, St. Ann
 - St. Elizabeth Homecoming Week, November 24-December 1, St. Elizabeth

- CONTINGENCY/ SPECIAL PROJECTS:
 - 2013 IAAF World Championships, August 10-18, Moscow, Russia

REGIONAL OFFICES

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

- Press tours
- Travel agent familiarization trips
- Special events and promotions
- Industry liaison (with JHTA, Craft Vendors, Resort Boards)
- Community liaison (with Chamber of Commerce, etc.)
- Visitor relations
- Information and facilitation services at the inland's international airports
- Meet the People Programme

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.

There were 571 persons who enquired and participated in the Meet-the-People experience. The visitors were entertained by the MTP Ambassadors 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. There were also enquiries from Germany, France, Austria, Netherlands, Brazil, Spain, Belgium, Italy, Poland, Holland, Isle of Man, Japan, Panama, India, Norway, Guyana, Pakistan, Argentina, England, Morocco, Guadeloupe and Denmark.

The Meet-the-People programme is promoted on the Board's website, regional offices, the hotels and 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.

The Visitor Relations Unit continued to provide the following:

- Assistance to all visitors in need, islandwide, on a wide-ranging basis
- Handle all complaints from visitors against hotels/other accommodations/ transportation/ attractions etc.
- Airport:
 - 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 - 1,069
 - Travel Specialists - 635
 - Others: - 5,350
 - Groups/Weddings, Honeymoon/Conventions, Meeting Planners
 - Hotel Reservations - 72 reservations for 118 visitors

2013/2014 Travel Agent/Tour Operator Arrivals

- | | |
|--------------------------------|----------------|
| • United States – 498 | Canada – 397 |
| • United Kingdom & Europe – 43 | Caribbean – 12 |

Travel agents and tour operators were guests of the Jamaica Tourist Board. They toured the resort areas and Kingston as groups and individuals. Various hotels and tour operators also conducted tours for travel agents.

Visitors' Assistance at the Offices/Airport

The region assisted 439 visitors and 251 students at the office in Montego Bay.

Visitors represented: USA, Trinidad, France, Brazil, Canada, Chile, Guyana, Columbia, Ireland, Holland, St. Vincent, Russia, U.K, Japan, China, Italy, Belgium, Norway, Germany, Argentina, London, the Netherlands, Czech Republic and Jamaica.

Major Events in the Region

- JAPEX 2013
- CHTA Marketplace 2014
- Western Consciousness Reggae Concert
- Two Millionth Visitor Arrival
- Official opening of the following hotels: Royalton White Sands, RIU Palace, Azul Sensatori, Jewel Paradise Cove
- Disney Series inaugural cruise to the Historic Port of Falmouth
- Jamaica Jazz & Blues Festival
- The Ministry of Finance hosted Economic Reform Forum

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 2013:

- World's Leading Cruise Destination
- World's Leading Tourism Development Project: Port of Falmouth
- Caribbean's Leading Airport: Sangster International Airport
- Caribbean's Leading Cruise Destination
- Caribbean's Leading Destination
- Caribbean's Leading Cruise Port: Ocho Rios
- Caribbean's Leading Tourist Board

Other Jamaica Tourist Board Awards:

- Baxter Awards 2013 for Best Tourist Board
- Agents' Choice Award 2013 for Favourite Tourist Board in Canada

Destination Awards:

- Baxter Awards 2013 for Best Honeymoon Destination
- Bonnier Corporation 2013 for Best Island Food
- Bonnier Corporation 2013 for Best Beach Bar: Rick's Café
- Agents' Choice Awards 2013 for Favourite Honeymoon Destination

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 2013/14, licences were approved for 4,744 entities as set out hereunder:

ENTITIES	RENEWAL	NEW	TOTAL
ATTRACTION	17	3	20
BIKE	4	0	4
CAR RENTAL	49	1	50
DOMESTIC TOUR	90	14	104
WATERSPORTS	80	6	86
HOTELS	9	5	14
NON HOTEL	1	12	13
TRAVEL HALT	0	1	1
CRAFT	804	194	998
TOTAL	1054	236	1290

CONTRACT CARRIAGE LICENCED APRIL 2013 - MARCH 2014

ENTITIES	RENEWAL	NEW	TOTAL
CONTRACT CARRIAGE	3,294	160	3,454
TOTAL	3,294	160	3,454

STATISTICS

INTERNATIONAL

The World Tourism Organization (UNWTO) reported that International tourist arrivals grew by 5% in 2013, reaching a record 1,087 million.⁷ Demand for international travel held its own again during 2013 despite the economic difficulties experienced in many parts of the world, the sector has displayed a notable capability to adjust to the changing market conditions, generating positive results for many economies.

The advanced economies performed reasonably better with a growth of 5.2% than the emerging economies that grew by 4.8% in 2013. All world regions recorded growth in international tourist arrivals for 2013. Asia and the Pacific saw the strongest growth of 6.0%, Africa grew by 5.6%, Europe recorded an increase of 5.4%, the Americas was up by 3.6%, and the Middle East with a flat growth of 0.3%.

CARIBBEAN

The Caribbean Tourism Organization (CTO) reported that 2013 was again a year of modest gains for the region as a whole. The region welcomed over 25 million tourist arrivals, which was 1.8% more than in 2012.⁸

The Caribbean region continued to be adversely affected by relatively weak economic conditions which persist in its key markets. However, double digit growth in the South American market was recorded, reflecting intense focus on attracting tourists from emerging markets. United States remained the most important supplier of tourists to the region with a growth of a 2.9% increase in arrivals. About 12.3 million Americans visited the region with most arriving in Dominican Republic, Jamaica, Puerto Rico and Bahamas. Canadian arrivals showed flat growth with arrivals up by 0.7%, while arrivals from Europe declined by 3.7%. Growth from South America was the most impressive recording a 13.0% increase in arrivals and Intra-regional travel as a whole grew by 2.1%.

The top three most visited islands in the region were: Dominican Republic, Cuba, and Jamaica, in descending order of importance. Overall the CARICOM countries remained flat recording a 0.2% growth for 2013, the Dutch Caribbean had the highest growth rate much more than the regional growth, recording a 4.9% increase over 2012. The performance of the Spanish speaking

⁷ UNWTO World Tourism Barometer – Volume 12 January 2014.

⁸ Caribbean Tourism Review 2013, Tourist Industry update 2013

Caribbean upheld its dominance in total arrivals, with a positive growth in arrivals of 2.4% increase over 2012.

The Caribbean Cruise sector is estimated to have increased by 2.7% in passenger arrivals during 2013 to approximately 21.8 million. The mixed results in cruise arrivals in individual destinations ranged from declines of 18.6% in Grenada to an increase of 41.4% in Curacao. Fourteen of the 23 destinations recorded increased cruise activity in 2013 over 2012. The Bahamas Islands continues to be the most popular Caribbean Cruise ship destination within the region and recorded a 6.2% growth in cruise ship passenger arrivals in 2013 with over 4.7 million passengers.

VISITOR ARRIVALS TO JAMAICA

- Total stopover arrivals of 2,008,409 increased by 1.1%
 - Foreign Nationals of 1,860,935 increased by 1.6%
 - Non-resident Jamaicans of 147,474 decreased by 4.1%
- Cruise passenger arrivals of 1,265,268 decreased by 4.2%

STOPOVERS

Total stopover arrivals in 2013 recorded a historical milestone of 2,008,409, which was 1.1% above the 1,986,085 arrivals recorded in 2012. This figure represents 22,324 more stopovers than in 2012. In the first quarter of 2013, Jamaica recorded a 2.5% negative growth in stopover arrivals over the 2012 figures. During the second quarter this growth was negligible of 0.3%. In the third quarter arrivals again recorded flat growth of 0.7%. In the last and final quarter of 2013, this trend had reverted to positive growth of 7.2% with all three month posting positive growth. This growth was led by the increase of 11.2% in arrivals during the month of October.

In every quarter, tourist arrivals in 2013 outperformed those in 2010, with growth rates of 2.0%, 7.9%, 3.1% and 5.3%, 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 2013 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.

- Roll out of a new advertising campaign “Get All Right” and the upgrade/redesign of the visitjamaica website.
- Jamaica’s online presence was increased by building a community around destination Jamaica across targeted groups, using social media marketing.
- Greater focus was placed on Latin America, Eastern Europe (Russia) and Asia (China) to ease travel mobility from these regions. Increased airlift and Visa facilitation for nationals were strategies used to develop and increase market share from these emerging markets.
- Airlift operations, especially out of Canada and the Southern region of the US, reduced their frequencies and routes.
- A number of hotels that changed ownership and management in 2012 remained closed, resulting in the unavailability of rooms for the majority of 2013.
- On-island Travel Agents’ Familiarization tours.
- The successful staging of signature calendar events continued to excite and stimulate awareness of Destination Jamaica.

Despite the challenges, Destination Jamaica has endured and continues to offer a product of very high quality to its visitors, through its expansive and inclusive nature in 2013. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations and provide value for money.

Average Length of Stay

In 2013 the overall average intended length of stay for foreign nationals was 8.7 nights; this was slightly below the level of 8.8 nights recorded in 2012. 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 6.8 nights and those who stayed in non-hotel accommodation stayed 14.0 nights.

American visitors, on the average, stayed 7.6 nights while Canadians stayed an average of 8.8 nights. Visitors from the United Kingdom recorded an average length of stay of 15.2 nights and those visitors from Continental Europe stayed 11.4 nights.

Purpose of Visit

Of the 2,008,409 stopover arrivals who visited the island during 2013, a total of 1,608,751 or 80.1% were visiting for the purpose of leisure, recreation and holiday; 8.7% were visiting Friends and Relatives, 4.8% were on business, and the remaining 6.4% were on other purposes.

Hotel Room Occupancy

The average room capacity fell by 8.4% in 2013, moving from 19,506 rooms in 2012 to 17,872 rooms in 2013. Total room nights sold of 4,431,205 in 2013 was flat at 0.3% below the 4,445,241 room nights sold in 2012. Hotel room occupancy grew by 5.6 percentage points to 67.9%, compared to the 62.3% level in 2012. The number of stopovers that intended to stay in hotel accommodations increased from 1,352,510 in 2012 to 1,398,909, an increase of approximately 3.4% in 2013.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 70.9%, which was up by 11.2% from the 63.7% recorded in 2012. The total number of room nights sold decreased by 5.4% moving from 1,615,601 in 2012 to 1,528,893 in 2013. The average room capacity fell by 14.7% in 2013, moving from 6,926 rooms in 2012 to 5,909 rooms in 2013. Several large hotel properties closed their doors during 2013, such as the two Breezes Resort & Spas; Rio Bueno and Trelawny, the Palmyra Resort, as well as the Ritz Carlton. The number of stopovers that intended to stay in hotel accommodations declined from 532,269 in 2012 to 529,814, a decrease of 0.5% in 2013.

The average hotel room occupancy rate for Ocho Rios was 70.9%, which was 4.7 percentage points higher than the 66.2% recorded in 2012. The total number of hotel room nights sold moved from 1,296,552 in 2012 to 1,356,440 in 2013 an increase of 4.6%. The number of stopovers that intended to stay in hotel accommodations increased from 360,500 in 2012 to 404,730, an increase of 12.3% in 2013.

The resort area of Negril recorded an average hotel room occupancy rate of 64.5% in comparison to the rate of 61.3% in 2012. The number of hotel room nights sold in this resort area increased by 1.3%, recording 1,162,069 room nights sold compared 1,147,701 sold in 2012. The average room capacity declined by 3.6% in 2013, moving from 5,118 rooms in 2012

to 4,933 rooms in 2013. The number of stopovers that intended to stay in hotel accommodations increased from 359,251 in 2012 to 361,647, an increase of 0.7% in 2013.

In the Mandeville/Southcoast resort area, average hotel room occupancy rate increased by 10 percentage points, moving from 55.2% in 2012 to 65.3% in 2013. Room nights sold increased from 111,956 in 2012 to 133,002 being sold in 2013.

Kingston & St. Andrew achieved a hotel room occupancy level of 57.8%, which was 8 percentage points higher than the 49.8% recorded in 2012. The number of room nights sold in Kingston & St. Andrew declined by 8.1%, moving from 270,767 in 2012 to 248,922 in 2013. The main contributing factor for this performance was the closure of the Wyndham Kingston, reducing the average room capacity from 1,485 rooms in 2012 to 1,180 in 2013.

Hotel room occupancy for the resort area of Port Antonio was 9.7%, which was 0.4 percentage points below the level of 10.1% recorded in 2012. The number of room nights sold in Port Antonio declined from 2,663 in 2012 to 1,879 in 2013.

Overall, the all-inclusive hotel room occupancy rate was 74.7%, compared to 69.7% recorded in 2012. Non all-inclusive room occupancy rate moved from 34.9% in 2012 to 39.5% in 2013.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 34.2%. Hotels with 51 – 100 rooms, achieved a rate of 40.6%. The number of stopovers that intended to stay in hotels with less than 100 rooms increased from 122,871 in 2012 to 123,270, an increase of 0.3% in 2013. Hotels in the size range of 101 – 200 rooms recorded a 68.2%, and hotels with over 200 rooms achieved a room occupancy rate of 76.5%. The number of stopovers that intended to stay in hotels with more than 100 rooms increased from 1,229,639 in 2012 to 1,275,639, an increase of 3.7% in 2013.

Visitor Expenditure

Gross visitor expenditure in 2013 was estimated at approximately US\$2.113 billion. This represents an increase of 2.1% against the estimated US\$2.070 billion earned in 2012.

Total expenditure of Foreign Nationals amounted to US\$1,936 billion. Cruise passenger expenditure totaled US\$0.102 billion while US\$0.075 billion was estimated as the contribution of Non-Resident Jamaicans.

Foreign Nationals spent on the average US\$117.22 per person per night while cruise passengers spent an average of US\$75.67 per person per night.

Direct Employment in the Accommodation Sector

The number of persons employed directly in the accommodation sub-sector declined from 35,197 in 2012 to 33,938 in 2013, a decrease of 3.6%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 29,865 persons or approximately 88.0% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 12,041 direct jobs represented 35.7% of those employed, Negril with 9,215 direct jobs, accounted for 27.2%, and Ocho Rios with 8,609, was responsible for 25.4%. Kingston, Port Antonio and the South coast accounted for the remaining 12.0% of employment in the accommodation sector.

The average number of employees per room in 2013 was estimated at 1.26.

New Developments 2014

Airlift

- Jet Blue Airlines is scheduled to increase operations out of Ft. Lauderdale Sangster's International Airport.
- Delta Airlines is expected to increase frequency out of Atlanta and Indianapolis during the summer months.
- Sunwing and Westjet Airlines will be offering increased service out of Toronto
- TUI Nordic and Thomas Cook Nordic began operating chartered service into Sangster's International Airport from Sweden.
- TUI Airline to increase frequency into Sangster's International Airport from London Gatwick, Manchester and Birmingham England.

Accommodations

- The RIU Palace in Montego Bay opened at the end of 2013.
- Several properties that changed ownership and underwent major refurbishing during 2013 are now open for business.
 - Jewel Paradise Cove; formerly Royal Decameron Caribbean,
 - Royalton Whitesands; formerly Breezes Trelawny.
- The Azul Sensatori formerly Beaches Sandy Bay & Spa is schedule to re-open in early 2014.
- The Ritz Carlton is still undergoing major refurbishing and adding over 190 new rooms.
- The Courtyard Marriott began construction of a 130 room property in Kingston and is expected to be completed by the end of 2014.

See Tables taken from the
Jamaica Tourist Board's Annual Travel Statistics for 2013
on the following pages – Appendix I

APPENDIX I

SUMMARY OF MAIN INDICATORS

	2012	2013	%Change 2013/2012
TOTAL STOPOVERS	<u>1,986,085</u>	<u>2,008,409</u>	<u>1.1</u>
Foreign Nationals	1,832,329	1,860,935	1.6
Non-Resident Jamaicans	153,756	147,474	-4.1
<u>MARKET REGION</u>	<u>1,986,085</u>	<u>2,008,409</u>	<u>1.1</u>
From U.S.A.	1,257,669	1,271,262	1.1
Canada	403,200	399,331	-1.0
Europe	222,428	235,811	6.0
Caribbean	64,984	58,249	-10.4
Latin America	25,037	30,538	22.0
Asia & Pacific	7,020	7,505	6.9
Other Countries	5,747	5,713	-0.6
<u>CRUISE SHIP PASSENGERS</u>	<u>1,320,083</u>	<u>1,265,268</u>	<u>-4.2</u>
<u>TOURIST ACCOMMODATION</u>	<u>28,536</u>	<u>26,839</u>	<u>-5.9</u>
Hotel Rooms *	20,974	20,359	-2.9
All-Inclusive	15,539	15,274	-1.7
Non All-Inclusive	5,435	5,085	-6.4
Other Rooms	7,562	6,480	-14.3
Guesthouses	3,061	3,087	0.8
Resort Villas & Cottages	3,801	2,772	-27.1
Apartments	700	621	-11.3
Hotel Room Nights Sold	4,445,241	4,431,205	-0.3
Average Hotel Room Nights Available	7,139,196	6,523,280	-8.6
Average Hotel Room Occupancy	<u>62.3</u>	<u>67.9</u>	<u>9.1</u>
All-Inclusive Hotels	69.7	74.7	7.2
Non All-Inclusive	34.9	39.5	13.2
<u>AVERAGE LENGTH OF STAY</u>			
Foreign Nationals	8.8	8.7	-1.1
Non-Resident Jamaicans	17.6	16.8	-4.5
<u>VISITOR EXPENDITURE (US\$ MILLION)</u>	<u>2,070</u>	<u>2,113</u>	<u>2.1</u>
Stopovers	1,968	2,011	2.2
Cruise Passengers	102	102	-0.2
<u>EMPLOYMENT IN ACCOMMODATION SECTOR</u>	<u>35,197</u>	<u>33,938</u>	<u>-3.6</u>

* Excluding 5,311 Closed Rooms

TABLE 1
VISITOR ARRIVALS TO JAMAICA
1999 - 2013

	STOPOVERS	CRUISE PASSENGERS	ARMED FORCES
1999	1,248,397	764,341	2,532
2000	1,322,690	907,611	1,464
2001	1,276,516	840,337	1,075
2002	1,266,366	865,419	807
2003	1,350,285	1,132,596	815
2004	1,414,786	1,099,773	2,737
2005	1,478,663	1,135,843	1,407
2006	1,678,905	1,336,994	999
2007	1,700,785	1,179,504	1,229
2008	1,767,271	1,092,263	1,010
2009	1,831,097	922,349	885
2010	1,921,678	909,619	280
2011	1,951,752	1,125,481	1,165
2012	1,986,085	1,320,083	464
2013	2,008,409	1,265,268	425

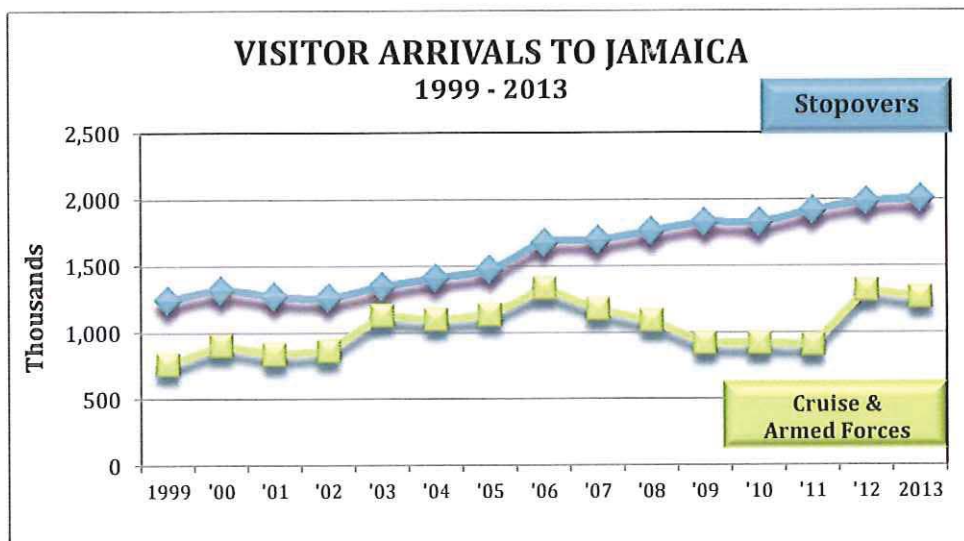
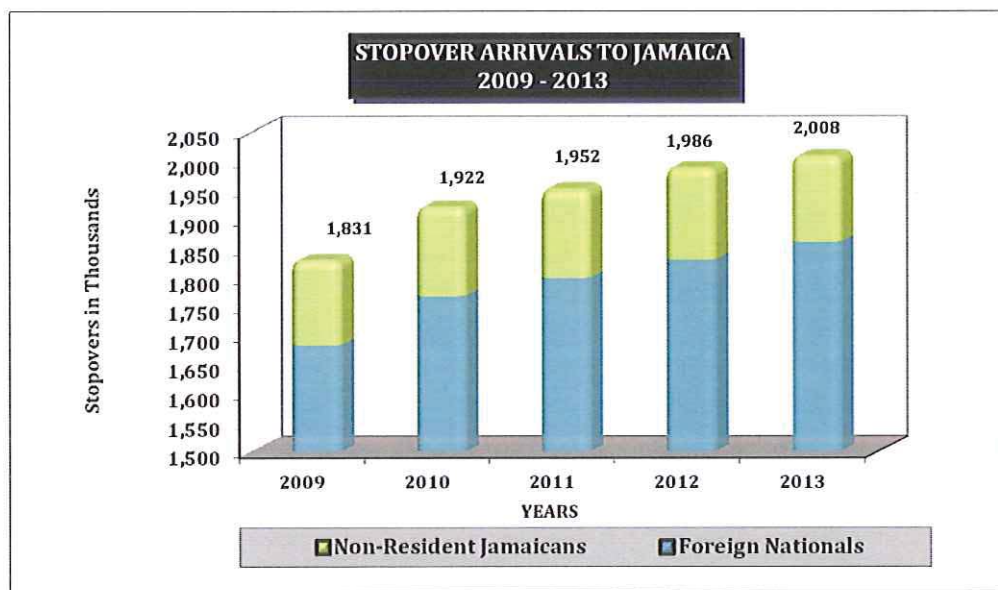


Fig. 1

TABLE 2**TOTAL STOPOVER ARRIVALS BY MONTH: 2009 - 2013**

	2009	2010	2011	2012	2013
January	148,886	161,094	174,144	169,355	161,455
February	160,282	167,462	175,114	180,595	166,010
March	175,929	201,378	204,046	204,724	213,109
April	164,090	166,955	179,444	180,511	171,630
Jan.-Apr.	649,187	696,889	732,748	735,185	712,204
May	153,443	149,775	146,583	157,233	160,785
June	168,561	164,205	166,545	179,814	186,481
July	195,940	204,526	202,493	209,824	205,655
August	152,573	159,408	155,133	157,863	164,336
September	95,263	97,010	98,280	104,360	105,426
October	108,820	114,699	112,536	111,253	123,663
November	125,494	134,320	139,721	138,395	148,512
December	181,816	200,846	197,713	192,158	201,347
May - Dec.	1,181,910	1,224,789	1,219,004	1,250,900	1,296,205
Jan. - Dec.	1,831,097	1,921,678	1,951,752	1,986,085	2,008,409
% Inc./Dec.	3.6	4.9	1.6	1.8	1.1

**Fig. 2**

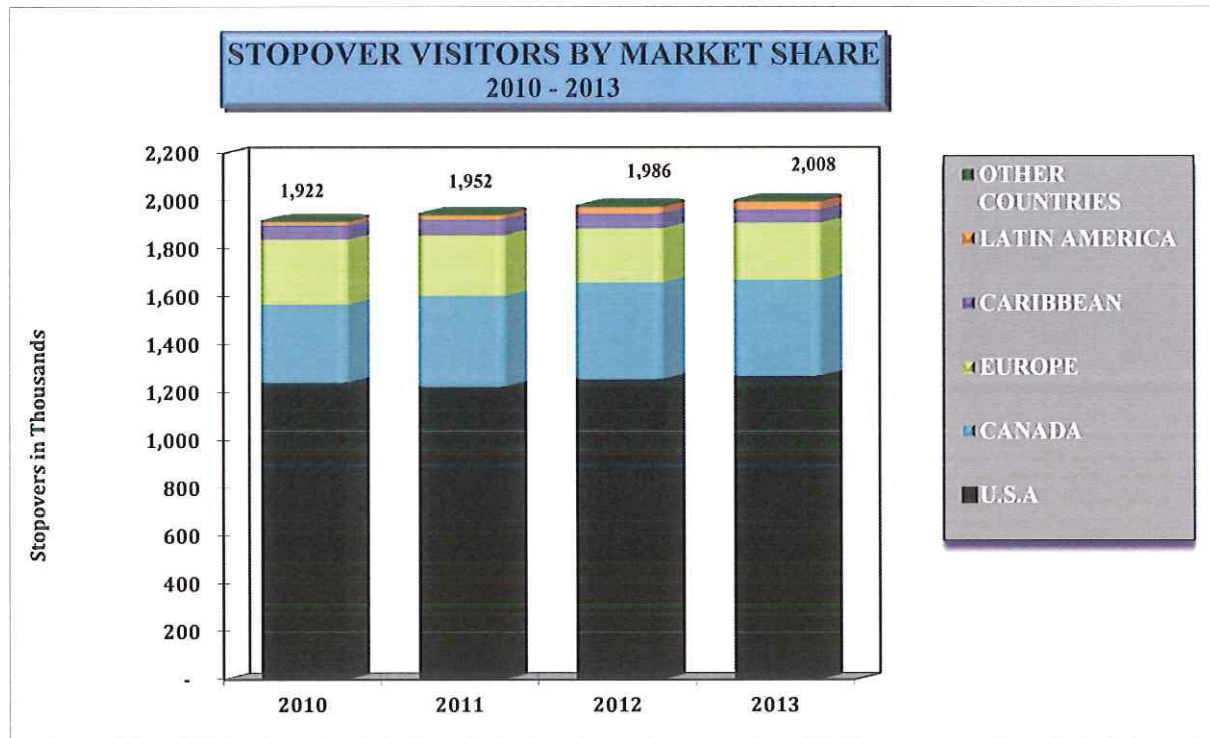


Fig. 4

Countries	Stopovers in Thousands								% Change 2013/12
	2010	%Share	2011	%Share	2012	%Share	2013	%Share	
U.S.A.	1,242.9	64.7	1,225.6	62.8	1,257.7	63.3	1,271.3	63.3	1.1
Canada	325.2	16.9	378.9	19.4	403.2	20.3	399.3	19.9	-1.0
Europe	271.3	14.1	253.0	13.0	222.4	11.2	235.8	11.7	6.0
Caribbean	58.3	3.0	66.2	3.4	65.0	3.3	58.2	2.9	-10.4
Latin America	13.4	0.7	16.6	0.8	25.0	1.3	30.5	1.5	22.0
Other Countries	10.5	0.5	11.4	0.6	12.8	0.6	13.2	0.7	3.5
Total	1,921.7	100.0	1,951.8	100.0	1,986.1	100.0	2,008.4	100.0	1.1

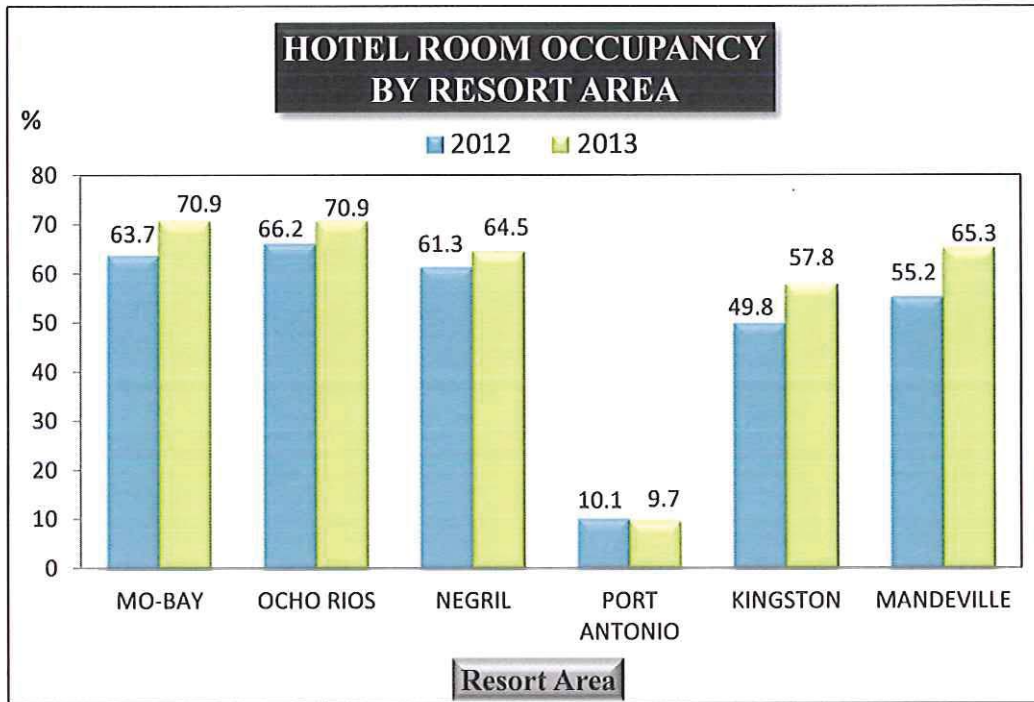


Fig.14



Fig.14a

TABLE 26
VISITOR ACCOMMODATION BY YEARS AND AREA

2010 - 2013

	R O O M S				%Change		B E D S				%Share	
	2010	2011	2012	2013	2013/12	2013	2010	2011	2012	2013	2013/12	2013
HOTELS												
Kingston	1,713	1,707	1,728	1,446	-16.3	7.1	3,449	3,449	3,495	2,931	-16.1	6.9
Montego Bay	7,254	7,092	7,113	6,927	-2.6	34.0	14,861	14,465	14,701	14,267	-3.0	33.8
Ocho Rios	5,695	5,532	5,829	5,836	0.1	28.7	12,151	12,432	12,813	12,574	-1.9	29.8
Negril	5,197	5,385	5,350	5,175	-3.3	25.4	10,514	10,912	10,844	10,475	-3.4	24.8
Port Antonio	249	249	209	182	-12.9	0.9	498	498	408	354	-13.2	0.8
Southcoast	715	700	745	793	6.4	3.9	1,436	1,440	1,530	1,626	6.3	3.9
Total	20,823	20,665	20,974	20,359	-2.9	100.0	42,909	43,196	43,791	42,227	-3.6	100.0
GUEST HOUSES												
Kingston	584	549	557	586	5.2	19.0	1,159	1,089	1,105	1,233	11.6	19.8
Montego Bay	466	499	499	525	5.2	17.0	924	980	980	1,045	6.6	16.8
Ocho Rios	415	433	433	363	-16.2	11.8	830	872	872	726	-16.7	11.7
Negril	833	766	766	737	-3.8	23.9	1,638	1,534	1,534	1,476	-3.8	23.7
Port Antonio	295	286	296	302	2.0	9.8	597	579	599	611	2.0	9.8
Southcoast	559	509	510	574	12.5	18.6	1,119	1,003	1,005	1,129	12.3	18.2
Total	3,152	3,042	3,061	3,087	0.8	100.0	6,267	6,057	6,095	6,220	2.1	100.0
RESORT VILLAS												
Kingston	12	12	12	0	-	0.0	24	24	24	0	-	0.0
Montego Bay	1,395	1,435	1,452	1,087	-25.1	39.2	2,751	2,831	2,867	2,133	-25.6	39.0
Ocho Rios	1,115	1,127	1,050	631	-39.9	22.8	2,272	2,296	2,145	1,274	-40.6	23.3
Negril	821	838	833	671	-19.4	24.2	1,620	1,648	1,652	1,327	-19.7	24.3
Port Antonio	290	301	294	235	-20.1	8.5	584	606	592	456	-23.0	8.3
Southcoast	148	161	160	148	-7.5	5.3	289	299	297	273	-8.1	5.0
Total	3,781	3,874	3,801	2,772	-27.1	100.0	7,540	7,704	7,577	5,463	-27.9	100.0

TABLE 26a

VISITOR ACCOMMODATION BY YEARS AND AREA

2010 - 2013

	R O O M S				%Change		B E D S				%Change		%Share	
	2010	2011	2012	2013	2013/12	2013	2010	2011	2012	2013	2013/12	2013	2013	2013
APARTMENTS														
Kingston	88	80	71	71	0.0	11.4	176	160	142	142	0.0	11.3		
Montego Bay	215	215	198	128	-35.4	20.6	430	430	396	256	-35.4	20.3		
Ocho Rios	367	363	366	347	-5.2	55.9	772	764	772	704	-8.8	56.0		
Negril	35	35	35	49	40.0	7.9	76	76	76	104	36.8	8.3		
Port Antonio	10	10	10	10	0.0	1.6	20	20	20	20	0.0	1.6		
Southcoast	20	20	20	16	-20.0	2.6	40	40	40	32	-20.0	2.5		
Total	735	723	700	621	-11.3	100.0	1,514	1,490	1,446	1,258	-13.0	100.0		
ALL TYPES OF ACCOMMODATION														
Kingston	2,397	2,348	2,368	2,103	-11.2	7.8	4,808	4,722	4,766	4,306	-9.7	7.8		
Montego Bay	9,330	9,241	9,262	8,667	-6.4	32.3	18,966	18,706	18,944	17,701	-6.6	32.1		
Ocho Rios	7,592	7,455	7,678	7,177	-6.5	26.7	16,025	16,364	16,602	15,278	-8.0	27.7		
Negril	6,886	7,024	6,984	6,632	-5.0	24.7	13,848	14,170	14,106	13,382	-5.1	24.3		
Port Antonio	844	846	809	729	-9.9	2.7	1,699	1,703	1,619	1,441	-11.0	2.6		
Southcoast	1,442	1,390	1,435	1,531	6.7	5.7	2,884	2,782	2,872	3,060	6.5	5.5		
Total	28,491	28,304	28,536	26,839	-5.9	100.0	58,230	58,447	58,909	55,168	-6.4	100.0		

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 for tourist accommodation.

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

TABLE 27**EMPLOYMENT IN ACCOMMODATION SECTOR**

	2009	2010	2011	2012	2013
MONTEGO BAY	11,780	12,818	12,198	12,203	12,041
OCHO RIOS	9,627	9,924	8,964	9,306	8,609
NEGRIL	10,040	9,905	9,407	9,365	9,215
KINGSTON	2,348	2,107	2,182	2,203	1,679
PORT ANTONIO	1,101	1,104	1,118	1,072	1,094
SOUTHCOAST	1,458	1,160	1,052	1,048	1,300
TOTAL	36,354	37,018	34,921	35,197	33,938

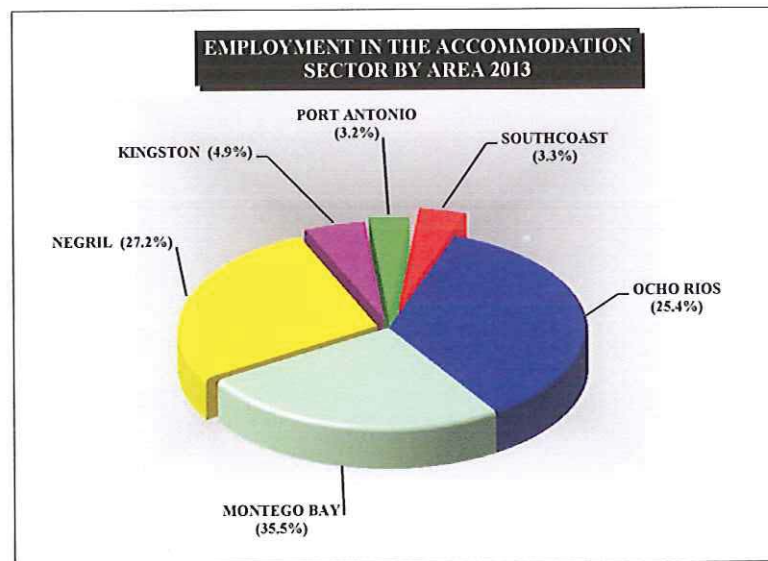
**Fig. 20**

TABLE 28

TOURIST BOARD BUDGET

	APPROVED	
	JS,000	US\$,000
1992/93	552,000	24,000
1993/94	738,459	24,269
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

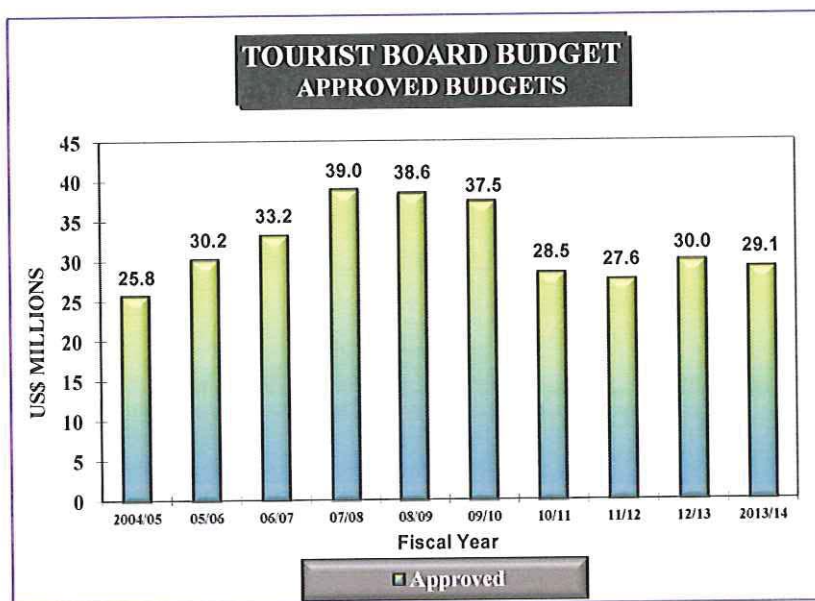


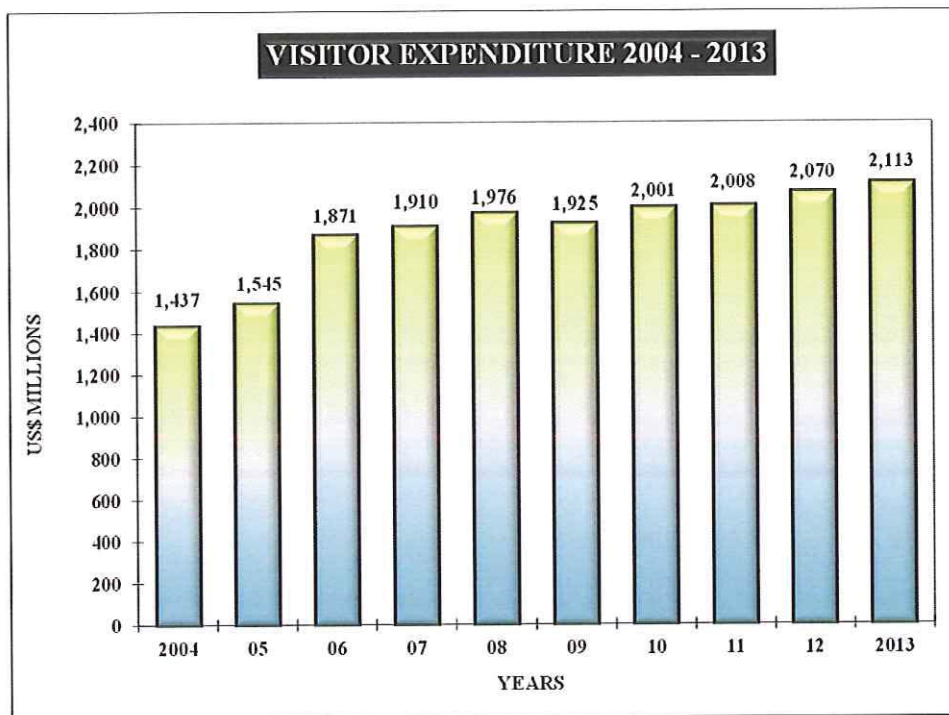
Fig. 21

- 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 2013/14 US\$1 = J\$97.00
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
2012	204,938,399	2,112,767

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

**Fig. 22**

APPENDIX II

JAMAICA TOURIST BOARD

FINANCIAL STATEMENTS

MARCH 31, 2014



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Chartered Accountants
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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 23, which comprise the statement of financial position as at March 31, 2014, 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. 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.



To the Board of Management
JAMAICA TOURIST BOARD

Report on the Financial Statements (cont'd)

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, 2014, and of its financial performance, changes in reserves and cash flows for the year then ended in accordance with International Financial Reporting Standards.

A handwritten signature in dark ink, appearing to be 'KPMG' with a stylized flourish at the end.

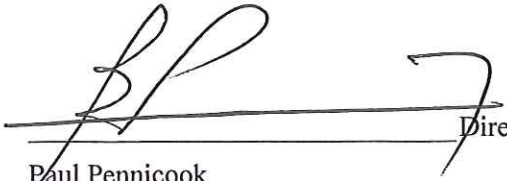
Chartered Accountants
Kingston, Jamaica

December 16, 2014


JAMAICA TOURIST BOARDStatement of Financial Position
March 31, 2014

	Notes	<u>2014</u> \$'000	<u>2013</u> \$'000
CURRENT ASSETS			
Cash and cash equivalents	3	138,435	420,835
Staff computer loans		71	83
Accounts receivable	4	<u>32,919</u>	<u>50,213</u>
		<u>171,425</u>	<u>471,131</u>
CURRENT LIABILITY			
Accounts payable and accruals	5	<u>221,900</u>	<u>365,467</u>
NET CURRENT (LIABILITY)/ASSETS		(50,475)	105,664
NON-CURRENT ASSET			
Property, plant & equipment	6	<u>4,198</u>	<u>5,146</u>
		<u>(46,277)</u>	<u>110,810</u>
Financed by:			
RESERVES			
Surplus from Tourism Trade Development Board		19	19
Capital expenditure fund	7	4,194	5,143
Accumulated (deficit)/surplus		<u>(50,490)</u>	<u>105,648</u>
		<u>(46,277)</u>	<u>110,810</u>

The financial statements on pages 3 to 23 were approved by the Board of Management on December 16, 2014 and signed on its behalf by:



Paul Pennicook
Director of Tourism



Dennis Morrison
Chairman of the Board

The accompanying notes form an integral part of the financial statements

JAMAICA TOURIST BOARD

Statement of Profit and Loss and Other Comprehensive Income
Comparison of Budgeted and Actual Expenditure
Year ended March 31, 2014

	Notes	2014		Favourable/ (Unfavourable) Variance	2013
		<u>Actual</u> \$'000	<u>Budget</u> \$'000	<u>\$'000</u>	<u>Actual</u> \$'000
Government Grants:					
Ministry of Tourism	2(g), 12	824,428	857,754	(33,326)	882,016
Tourism Enhancement Fund	9, 12	<u>1,989,994</u>	<u>1,965,762</u>	<u>24,232</u>	<u>1,801,241</u>
		<u>2,814,422</u>	<u>2,823,516</u>	<u>(9,094)</u>	<u>2,683,257</u>
Less grants used for:					
Capital expenditure		<u>1,887</u>	<u>1,925</u>	<u>38</u>	<u>1,016</u>
Amount for operational expenditure		<u>2,812,535</u>	<u>2,821,591</u>	<u>(9,056)</u>	<u>2,682,241</u>
Operational expenditure:					
USA		460,125	410,979	(49,146)	403,749
Toronto regional		127,961	117,463	(10,498)	124,528
Germany		78,882	68,211	(10,671)	61,203
Deputy director – UK/Europe		98,207	90,031	(8,176)	94,563
Advertising		1,269,878	1,152,195	(117,683)	640,462
Public relations		203,789	185,270	(18,519)	176,936
Special projects		155,546	137,746	(17,800)	188,362
Familiarisation tours		8,943	9,700	757	11,754
CTO Marketing fund		(35,660)	-	35,660	10,677
Marketing representatives		82,837	80,403	(2,434)	58,264
Membership – International Org		<u>21,621</u>	<u>20,747</u>	<u>(874)</u>	<u>17,946</u>
Balance carried forward		<u>2,472,129</u>	<u>2,272,745</u>	<u>(199,384)</u>	<u>1,788,444</u>

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

JAMAICA TOURIST BOARD

Statement of Profit and Loss and Other Comprehensive Income
Comparison of Budgeted and Actual Expenditure
Year ended March 31, 2014

	<u>2014</u>			<u>2013</u>
	<u>Actual</u>	<u>Budget</u>	Favourable/ (Unfavourable) <u>Variance</u>	<u>Actual</u>
	<u>\$'000</u>	<u>\$'000</u>	<u>\$'000</u>	<u>\$'000</u>
Operational expenditure:				
Balance brought forward	<u>2,472,129</u>	<u>2,272,745</u>	(199,384)	<u>1,788,444</u>
Local offices expenditure:				
Executive office				
- Director's department	60,000	60,879	879	53,231
Destination marketing	107,476	109,475	1,999	101,430
Corporate services	207,708	203,868	(3,840)	213,074
Finance and accounting	54,650	59,233	4,583	45,894
Internal audit	9,017	9,180	163	8,717
General manager – regional offices (including visitor relations and meet the people)	78,065	82,622	4,557	70,107
Cruise, marine & attractions	<u>26,733</u>	<u>26,950</u>	<u>217</u>	<u>27,532</u>
	<u>543,649</u>	<u>552,207</u>	<u>8,558</u>	<u>519,985</u>
Other:				
Foreign exchange (gain)/losses	(13,183)	-	13,183	277
TOTAL EXPENDITURE	<u>3,002,595</u>	<u>2,824,952</u>	(177,643)	<u>2,308,706</u>
Other income:				
Interest income	513	-	513	787
Miscellaneous income	<u>33,409</u>	-	<u>33,409</u>	<u>42,791</u>
	<u>33,922</u>	-	<u>33,922</u>	<u>43,578</u>
(Deficit)/surplus for the year, being total comprehensive (loss)/income	(<u>156,138</u>)	(<u>3,361</u>)	(152,777)	<u>417,113</u>

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

JAMAICA TOURIST BOARD

Statement of Changes in Reserves
Year ended March 31, 2014

	Surplus from Tourism Trade Development Board \$'000	Capital expenditure fund \$'000	Accumulated deficit \$'000	Total \$'000
Balances at March 31, 2012	19	9,695	(311,465)	(301,751)
Net capital expenditure	-	(4,552)	-	(4,552)
Total surplus recognised in 2013	<u>-</u>	<u>-</u>	<u>417,113</u>	<u>417,113</u>
Balances at March 31, 2013	19	5,143	105,648	110,810
Net capital expenditure	-	(949)	-	(949)
Total deficit recognised in 2014	<u>-</u>	<u>-</u>	<u>(156,138)</u>	<u>(156,138)</u>
Balances at March 31, 2014	<u>19</u>	<u>4,194</u>	<u>(50,490)</u>	<u>(46,277)</u>

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

JAMAICA TOURIST BOARD

Statement of Cash Flows
Year ended March 31, 2014

	<u>2014</u> \$'000	<u>2013</u> \$'000
CASH FLOW FROM OPERATING ACTIVITIES:		
(Deficit)/surplus for year	(156,138)	417,113
Adjustments to reconcile (deficit)/surplus for year to net cash (used)/provided by operating activities:		
Interest income	(513)	(787)
Depreciation	<u>2,835</u>	<u>5,565</u>
	(153,816)	421,891
Decrease in current asset:		
Accounts receivable and staff computer loans	17,306	31,892
Decrease in current liability:		
Accounts payable and accruals	(143,567)	(170,795)
Net cash (used by)/provided by operating activities	<u>(280,077)</u>	<u>282,988</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Additions to property, plant & equipment	(1,887)	(1,015)
Interest received	<u>513</u>	<u>787</u>
Net cash used by investing activities	<u>(1,374)</u>	<u>(228)</u>
CASH FLOWS FROM FINANCING ACTIVITY		
Capital expenditure fund, being net cash used from financing activity	(949)	(4,552)
Net increase in cash and cash equivalents	(282,400)	278,208
Cash and cash equivalents at beginning of the year	<u>420,835</u>	<u>142,627</u>
Cash and cash equivalents at end of the year	<u>138,435</u>	<u>420,835</u>

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements March 31, 2014

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 against operating budgets prepared annually by the Board. The registered office of the Board is located at 64 Knutsford Boulevard, Kingston 5.

The Board's employees aggregated 129 persons at March 31, 2014 (2013: 133)

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 issued by the International Accounting Standards Board.

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

Certain new IFRS, interpretations of, and amendments to, existing standards which were in issue, came into effect for the current financial year. The Board has assessed them and has adopted those which are relevant to its financial statements, with a date of initial application of April 1, 2013. The nature and effects of the changes are as follows:

(i) *IFRS 13, Fair Value Measurement*

IFRS 13 establishes a single framework for measuring fair value and making disclosures about fair value measurements when such measurements are required or permitted by other IFRSs. It unifies the definition of fair value as 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. It replaces and expands the disclosure requirements about fair value measurements in other IFRSs, including IFRS 7. Disclosure relating to the fair value of the entity's instrument is reflected in note 14.

In accordance with the transitional provisions of IFRS 13, the Board applied the new fair value measurement guidance prospectively and has not provided any comparative information for new disclosures. Notwithstanding the above, the change had no significant impact on the measurements of the Board's assets and liabilities.

(ii) *Presentation of Items of Other Comprehensive Income (Amendments to IAS 1)*

As a result of the amendments to IAS 1, items of other comprehensive income (OCI) that may be reclassified to profit or loss in the future are presented separately from those that will never be reclassified to profit or loss. Also, the title of the statement has changed from statement of comprehensive income to *statement of profit or loss and other comprehensive income*.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

2. Statement of compliance, basis of preparation, and significant accounting policies (cont'd)

(a) Statement of compliance (cont'd):

New and revised standards and interpretations that are not yet effective:

At the date of authorisation of the financial statements, certain new and revised standards and interpretations have been issued but are not yet effective, and which the Board has not early-adopted. The Board has assessed the following standards as relevant but none will have a significant impact on its financial statements:

- Amendment to IAS 32 *Financial Instruments: Presentation* - The standard clarifies that an entity currently has a legal enforceable right to offset if that right is not contingent on a future event; and enforceable both in the normal course of business and in the event of default, insolvency or bankruptcy of the entity and all the counterparts. In addition, it clarifies that gross settlement is equivalent to net settlement if, and only if the gross settlement mechanism has features that eliminate or result in insignificant credit and liquidity risk; and process receivables and payables in a single settlement process or cycle. The amendment is effective for annual reporting periods beginning on or after January 1, 2014.
- *IFRS 9, Financial Instruments* (effective January 1, 2018) introduces new requirements for classifying and measuring financial assets. The standard also amends some of the requirements of *IFRS 7 Financial Instruments: Disclosures*, including added disclosures about investments in equity instruments designated as fair value through other comprehensive income.
- Amendments to IAS 36 *Impairment of Assets: Recoverable Amount Disclosures for Non-financial Assets*, which is effective for accounting periods beginning on or after January 1, 2014, reverse the unintended requirement in *IFRS 13 Fair Value Measurement*, to disclose the recoverable amount of every cash-generating unit to which significant goodwill or indefinite-lived intangible assets have been allocated. The amendment requires the recoverable amount to be disclosed only when an impairment loss has been recognised or reversed.

Improvements to IFRS 2010-2012 and 2011-2013 cycles contain amendments to certain standards and interpretations and are effective for accounting periods beginning on or after July 1, 2014. The main amendments applicable to the Board are as follows:

- *IFRS 13 Fair Value Measurement* is amended to clarify that issuing of the standard and consequential amendments to IAS 39 and IFRS 9 did not intend to prevent entities from measuring short-term receivables and payables that have no stated interest rate at their invoiced amounts without discounting, if the effect of not discounting is immaterial.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

2. Statement of compliance, basis of preparation, and significant accounting policies (cont'd)

(a) Statement of compliance (cont'd):

Improvements to IFRS 2010-2012 and 2011-2013 cycles contain amendments to certain standards and interpretations and are effective for accounting periods beginning on or after July 1, 2014. The main amendments applicable to the Board are as follows (cont'd):

- *IAS 16 Property, Plant and Equipment and IAS 38 Intangible Assets.* The standards have been amended to clarify that, at the date of revaluation:
 - (i) the gross carrying amount is adjusted in a manner that is consistent with the revaluation of the carrying amount of the asset and the accumulated depreciation/amortization is adjusted to equal the difference between the gross carrying amount and the carrying amount of the asset after taking account of accumulated impairment losses or
 - (ii) the accumulated depreciation/amortization is eliminated against the gross carrying amount of the asset.
- *IAS 24 Related Party Disclosures* has been amended to extend the definition of 'related party' to include a management entity that provides key management personnel services to the reporting entity, either directly or through a group entity. For related party transactions that arise when key management personnel services are provided to a reporting entity, the reporting entity is required to separately disclose the amounts that it has recognized as an expense for those services that are provided by a management entity; however, it is not required to 'look through' the management entity and disclose compensation paid by the management entity to the individuals providing the key management personnel services.

Management 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:

The financial statements are presented in Jamaica dollars (\$'000), which is the currency in which the Board conducts the majority of its operations.

The preparation of the financial statements in accordance with IFRS assumes that the Board will continue operations for the foreseeable future. This means, in part, that the statement of profit or loss and other comprehensive income and the statement of financial position assume no intention or necessity to liquidate or curtail the scale of operations. This is commonly referred to as the going concern basis. The Board reported a deficit of \$156,138,000 for the year ended March 31, 2014 (2013: surplus of \$417,113,000). As at the same date, current liabilities exceed current assets by \$50,475,000 (2013: current assets exceeded current liabilities by \$105,664,000).

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

2. Statement of compliance, basis of preparation, and significant accounting policies (cont'd)

(b) Basis of preparation (cont'd):

Nevertheless, as the Board is funded mainly by Government grants and, having regards to the Government's commitment to tourism and demonstrated financial support, management believes that the going concern basis continues to be appropriate in the preparation of the financial statements.

(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.

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.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2014

2. Statement of compliance, basis of preparation, and significant accounting policies (cont'd)

(e) Property, plant & equipment:

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

(f) 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%

(g) 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 stated 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.

(h) Income:

Government grants are recognised when received or deemed received.

(i) Accounts receivable:

Accounts receivable are stated at cost less impairment losses [see note 2(m)].

(j) Accounts payable:

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2014

2. Statement of compliance, basis of preparation, and significant accounting policies (cont'd)

(k) 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.

(l) Loans:

Loans are recognised initially at the proceeds received, net of transaction costs incurred. Loans are subsequently stated at amortised cost using the effective yield method. Any difference between net proceeds and the redemption value is recognised in the statement of profit or loss and other comprehensive income for the period of the loan.

(m) 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.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2014

2. Basis of preparation, statement of compliance and significant accounting policies (cont'd)

(m) Impairment (cont'd):

(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.

(n) 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, staff car loans, accounts receivable and staff computer loans and financial liability comprise accounts payable.

3. Cash and cash equivalents

	<u>2014</u> \$'000	<u>2013</u> \$'000
Cash at bank	133,221	416,111
Imprest accounts	<u>5,214</u>	<u>4,724</u>
	<u>138,435</u>	<u>420,835</u>

4. Accounts receivable

	<u>2014</u> \$'000	<u>2013</u> \$'000
Ministry of Tourism	1,286	1,166
Office of the Prime Minister/Accountant General	-	15,163
Tourism Product Development Company Ltd	4,642	4,224
Jamaica Vacations Limited	78	89
Ministry of Transport and Works	150	-
Prepayments and deferred expenses	27,650	24,073
Others	<u>4,257</u>	<u>10,642</u>
	38,063	55,357
Less provision for bad debts	(5,144)	(5,144)
	<u>32,919</u>	<u>50,213</u>

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2014

4. Accounts receivable (cont'd)

The aging of amounts due from the Ministry of Tourism, Office of the Prime Minister, Jamaica Vacations Limited and Tourism Product Development Company Limited at the reporting date was:

	<u>2014</u>		<u>2013</u>	
	<u>Gross</u>	<u>Impairment</u>	<u>Gross</u>	<u>Impairment</u>
	<u>\$'000</u>	<u>\$'000</u>	<u>\$'000</u>	<u>\$'000</u>
Not past due	987	-	15,246	-
Past due 31-60 days	19	-	171	-
Past due 61-90 days	6	-	81	-
Past due over 90 days	<u>5,144</u>	<u>5,144</u>	<u>5,144</u>	<u>5,144</u>
	<u>6,156</u>	<u>5,144</u>	<u>20,642</u>	<u>5,144</u>

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

	<u>2014</u>	<u>2013</u>
	<u>\$'000</u>	<u>\$'000</u>
Balance at April 1	5,144	3,941
Impairment loss recognised, net	<u>-</u>	<u>1,203</u>
Balance at March 31	<u>5,144</u>	<u>5,144</u>

5. Accounts payable and accruals

	<u>2014</u>	<u>2013</u>
	<u>\$'000</u>	<u>\$'000</u>
Trade payables	93,684	234,862
Accrued charges	126,653	125,700
Other	<u>1,563</u>	<u>4,905</u>
	<u>221,900</u>	<u>365,467</u>

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 20146. Property, plant and equipment

	Freehold land and buildings \$'000	Furniture, fixtures and equipment \$'000	Motor vehicle \$'000	Total \$'000
Cost:				
March 31, 2012	294	115,339	7,800	123,433
Additions	-	1,015	-	1,015
Disposal	-	(850)	-	(850)
March 31, 2013	294	115,504	7,800	123,598
Additions	-	1,887	-	1,887
Disposal	-	(491)	-	(491)
March 31, 2014	<u>294</u>	<u>116,900</u>	<u>7,800</u>	<u>124,994</u>
Depreciation:				
March 31, 2012	269	108,159	5,309	113,737
Charge for the year	-	4,380	1,185	5,565
Eliminated on disposal	-	(850)	-	(850)
March 31, 2013	269	111,689	6,494	118,452
Charge for the year	-	1,976	859	2,835
Eliminated on disposal	-	(491)	-	(491)
March 31, 2014	<u>269</u>	<u>113,174</u>	<u>7,353</u>	<u>120,796</u>
Net book values:				
March 31, 2014	<u>25</u>	<u>3,726</u>	<u>447</u>	<u>4,198</u>
March 31, 2013	<u>25</u>	<u>3,815</u>	<u>1,306</u>	<u>5,146</u>
March 31, 2012	<u>25</u>	<u>7,180</u>	<u>2,491</u>	<u>9,696</u>

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 BOARD

Notes to the Financial Statements (Continued) March 31, 2014

8. Disclosure of expenses

Deficit for the year is stated after charging:

	<u>2014</u> \$'000	<u>2013</u> \$'000
Depreciation	2,835	5,565
Directors' emoluments:		
Fees	797	761
Remuneration	23,365	23,369
Auditors' remuneration – current year	1,200	1,200
Payroll costs	<u>652,189</u>	<u>606,833</u>

9. Tourism Enhancement Fund

The Jamaica Tourist Board received additional funding from the Tourism Enhancement Fund (T.E.F) in the amount of \$1,989,994,070 (2013: \$1,801,240,644). These funds were used to assist in the Board's advertising and special projects expenses and include:

	<u>2014</u> \$'000	<u>2013</u> \$'000
Advertising/marketing activities:		
Winter advertising	1,960,856	1,713,085
London olympics	-	70,156
Tourism outlook seminar	1,014	10,000
Island Jamaica T20 cricket tournament	24,659	8,000
Taste of the caribbean	2,000	-
Dinner for customs and immigration officers	<u>1,465</u>	<u>-</u>
	<u>1,989,994</u>	<u>1,801,241</u>

10. Taxation

The Board is exempt from taxation of surpluses arising from normal operating activities and other investment 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. Employees are eligible to join the plan after 3 months of service and have attained the age of 20½, membership in the plan is vested at all times and is non-forfeitable.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

11. Pension scheme (cont'd)

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, as the employees do not make any contributions to this scheme. Pension is calculated at the rate of 1/540 of pensionable emoluments, multiplied by each complete month of pensionable service. The pensionable salary at the date of retirement is used to compute the pension due. An officer may elect to receive in lieu of his full pension a reduced pension plus a gratuity. The Board completes the administration of the pension process and payments are made on the authority of an award letter from 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.
 - (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).

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

12. Related party balances and transactions (cont'd)

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

	<u>2014</u> \$'000	<u>2013</u> \$'000
Accounts receivable:		
Ministry of Tourism	1,286	1,166
Office of the Prime Minister	-	15,163
Tourism Product Development Company Limited	4,642	4,224
Jamaican Vacation Limited	78	89
Ministry of Transport and Works	<u>150</u>	<u>-</u>
	<u>6,156</u>	<u>20,642</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>2014</u> \$'000	<u>2013</u> \$'000
Income:		
Ministry of Tourism	824,428	882,016
Tourism Enhancement Fund	<u>1,989,994</u>	<u>1,801,241</u>
	<u>2,814,422</u>	<u>2,683,257</u>

13. Financial instruments

(a) 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.

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)
March 31, 201413. Financial instruments (cont'd)

(a) Financial instrument risk (cont'd):

(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.

	<u>2014</u> \$'000	<u>2013</u> \$'000
Staff computer loans	71	83
Cash and cash equivalents	138,435	420,835
Accounts receivable	<u>32,919</u>	<u>50,213</u>
	<u>171,425</u>	<u>471,131</u>

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.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2014

13. Financial instruments (cont'd)

(a) Financial instrument risk (cont'd):

(ii) Market rate risk (cont'd):

- 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.

Interest-bearing financial assets mainly comprise cash and cash equivalents.

At the reporting date the interest rate profile of the Board's interest-bearing financial instruments was:

	<u>Carrying amount</u>	
	<u>2014</u>	<u>2013</u>
	<u>\$'000</u>	<u>\$'000</u>
Variable rate:		
Assets	<u>71,043</u>	<u>258,199</u>

Fair value sensitivity analysis for fixed rate instruments:

The Board does not hold any fixed rate financial assets that are subject to material changes in fair value. Therefore, a change in interest rates at the reporting date would not affect profit or equity.

Interest rate sensitivity:

An increase of 250 (2013: 250) basis points in interest rates at the reporting date would have decreased the deficit by \$1,776,000 (2013: \$6,455,000). This assumes that all variables remain constant.

An decrease of 100 (2013: 100) basis points in interest rates at the reporting date would have increased the deficit by \$710,430 (2013: \$2,582,000). This assumes that all variables remain constant.

- 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.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

13. Financial instruments (cont'd)

(a) Financial instrument risk (cont'd):

(ii) Market rate risk (cont'd):

- Foreign currency risk (cont'd):

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

	Net foreign currency (liabilities)/assets 2014				Net foreign currency (liabilities)/assets 2013			
	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000
Cash and cash equivalents	6	861	93	106	108	3,075	159	154
Accounts receivable	-	15	8	-	-	242	51	-
Accounts payable	(130)	(1,229)	(52)	(131)	(5)	(2,471)	(56)	(54)
	(124)	(353)	49	(25)	103	846	154	100

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

	<u>US\$</u>	<u>EURO</u>	<u>GBP</u>	<u>CDN</u>
March 31, 2014:	109.57	150.68	179.38	98.93
March 31, 2013:	97.94	123.45	148.04	96.51

A 15% (2013: 1%) strengthening of the above currencies against the Jamaica dollar would have decreased deficit by \$7,647,913 (2013: \$1,280,805).

A 1% (2013: 10%) weakening of the above currencies against the Jamaica dollar would have increased deficit by \$511,893 (2013: \$12,808,046).

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. Prudent liquidity risk management implies maintaining sufficient cash and marketable securities, and the availability of funding through an adequate amount of committed credit facilities, by maintaining lines of credit with its bankers and by monitoring expenditure commitments.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2014

13. Financial instruments (cont'd)

(a) Financial instrument risk (cont'd):

(iii) Liquidity risk (cont'd):

The Board's liquidity management process includes, monitoring future cash flows and liquidity on a monthly basis. This incorporates an assessment of expected cash flows and the availability of high grade collateral which could be used to maintain committed lines of credit.

Financial liabilities cash flows

The table below presents the undiscounted cash flows payable (both interest and principal cash flows) on the Board's financial liabilities based on contractual repayment obligations at the reporting date.

	Carrying <u>amount</u> \$'000	Contractual <u>cash flows</u> \$'000	0-12 <u>months</u> \$'000
March 31, 2014:			
Accounts payable	<u>221,900</u>	<u>221,900</u>	<u>221,900</u>
March 31, 2013:			
Accounts payable	<u>365,467</u>	<u>365,467</u>	<u>365,467</u>

(b) Capital Management

The objective is to maintain a strong capital base as to sustain future development of the Board.

14. Fair value of financial instruments

The cost reflected in the financial statements for monetary assets and liabilities such as cash and cash equivalents, accounts receivable, accounts payable and other financial liabilities, are assumed to approximate their fair values due to their relatively short-term nature. Additionally, the cost of all monetary assets and liabilities has been appropriately adjusted to reflect estimated losses on realisation or discounts on settlement. Amounts due to/from related entities are assumed to approximate their carrying value due to their short-term nature, or an ability to effect future set-offs in the amounts disclosed.

APPENDIX III

JAMAICA TOURIST BOARD									
SENIOR EXECUTIVE COMPENSATION									
LOCAL OFFICES									
Position of Senior Executive	YEAR	Salary	Gratuity/ Performance Incentive	Travelling/ Value of Assigned Car	Pension	Other Allowances	Non-Cash Benefits	Total	
		J\$	J\$	J\$		J\$	J\$	J\$	
Director of Tourism(Contract)	2013/2014	12,900,000	Gratuity	1,718,748	No	6,315,000	83,122	21,016,870	
D/Director- Marketing (Contract)	2013/2014	5,650,000	Grat/Per. Incentive	975,750	No	1,653,000	109,512	8,388,262	
D/Director-Cruise, Events & Attractions	2013/2014	5,383,438	Per. Incentive	975,750	Yes	737,499	153,963	7,250,650	
Head, Corporate Services (Contract)	2013/2014	5,690,262	Grat/Per.Incentive	975,750	No	0	95,171	6,761,183	
Chief Financial Officer (Contract)	2013/2014	5,124,232	Grat/Per.Incentive	975,750	No	0	76,753	6,176,735	
Regional Director -Jamaica (Contract)	2013/2014	3,654,585	Grat/Per.Incentive	975,750	No	639,059	102,538	5,371,932	
Senior Manager, Information Systems (Contract)	2013/2014	4,958,114	Grat/Per.Incentive	975,750	No	0	103,330	6,037,194	
OVERSEAS OFFICES									
Position of Senior Executive									
D/Director - Sales U.S.A.	2013/2014	US\$ 81,756	Perform. Incentive	US\$ 9,444	US\$ Yes	US\$ 64,852	US\$ 42,367	198,419	
Regional Director - Tour Operators& Airlines	2013/2014	73,321	Grat./Per.Incentive	9,444	Yes	33,660	42,760	159,185	
Regional Director - Groups & Conventions	2013/2014	77,862	Perform. Incentive	9,444	Yes	59,070	46,073	192,449	
		Can\$	Can\$	Can\$	Can\$	Can\$	Can\$	Can\$	
Regional Director - Canada	2013/2014	98,412	Perform. Incentive	13,212	Yes	82,698	25,076	219,398	
Regional Director - UK	2013/2014	£ 45,991	Perform. Incentive	£ 5,688	Yes	£ 35,584	£ 11,964.61	£ 99,227.61	
Regional Director - Europe	2013/2014	€ 72,094	Perform. Incentive	€ 8,760	Yes	€ 62,807	€ 9,868.56	€ 153,529.56	

**JAMAICA TOURIST BOARD
DIRECTORS COMPENSATION 2013/2014**

Names	Position of Director	Fees	Motor Vehicle upkeep/Travelling	Honoraria	Other Compensation	Total
		J\$	J\$	J\$	J\$	J\$
Dennis Morrison	Chairman	141,000				141,000
Wayne Cummings	Member	44,500				44,500
Marc Melville	Member	48,500				48,500
Zein Issa Nakash	Member	152,500				152,500
Paul Pennicook	Member	74,500				74,500
Noel Sloley Jr	Member	70,500				70,500
Evelyn Smith	Member	85,500				85,500
Carolyn Wright	Member	102,500				102,500
Gordon Brown	Member	95,000	205,304			300,304
Kevin Hendrickson	Member	-				-