



ANNUAL REPORT  
OF THE

# JAMAICA

TOURIST BOARD  
APRIL 2014 - MARCH 2015

**ANNUAL REPORT**

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**JAMAICA TOURIST BOARD**

**APRIL 2014 – MARCH 2015**

# **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.”***

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APRIL 2014 – MARCH 2015**



## **JAMAICA TOURIST BOARD**

### **BOARD OF DIRECTORS**

**APRIL 1, 2014 – MARCH 31, 2015**

Mr. Dennis Morrison	-	Chairman of the Board
Mr. John Lynch *	-	Director of Tourism
Mr. Paul Pennicook **	-	Director of Tourism
Mrs. Evelyn Smith	-	President of the Jamaica Hotel & Tourist Association (until May 31, 2014 – re-appointed to Board August 25, 2014)
Mrs. Nicola Madden-Grieg	-	President of the Jamaica Hotel & Tourist Association (appointed to Board August 25, 2014)
Mr. Wayne Cummings	-	Hotelier, Sandals Resort International
Mrs. Zein Issa Nakash	-	Vice President – Corporate Marketing and Environmental Affairs, SuperClubs
Ms. Carolyn Wright	-	Hotelier
Mr. Kevin Hendrickson	-	Hotelier
Mr. Noel Sloely, Jr.	-	Ground Transportation Executive
Mr. Marc Melville	-	Attractions Operator
Mr. Gordon Brown	-	Attorney-at-Law

#### **Resource Persons:**

Mr. Josef Forstmayr	-	Hotelier; Managing Director, Round Hill Hotel
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**\* Mr. John Lynch demitted office as Director of Tourism on May 30, 2014.**

**\*\* Mr. Paul Pennicook, Board Member, was appointed Director of Tourism with effect from July 9, 2014.**

**The tenure of this Board expired on January 29, 2015. The Board was (re)-appointed as below for the two-year period January 30, 2015 to January 29, 2017.**

## **JAMAICA TOURIST BOARD**

### **BOARD OF DIRECTORS**

**EFFECTIVE JANUARY 30, 2015**

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

#### **Resource Persons:**

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

## INTRODUCTION / OVERVIEW

The year 2015 is an important landmark in the life of the Jamaica Tourist Board. Sixty years ago, this organization came into being, and since that time, it has played a significant role in the development of our industry and indeed the nation. We intend to use this opportunity to say thanks to our partners and to the community for facilitating the growth of this fascinating industry.

For calendar year 2014, Jamaica welcomed 3.5 million visitors, 2.08 million stopovers and 1.42 million cruise visitors.

For stopover arrivals, there was growth from all regions except Latin America.

- The US was up 2%
- Canada was up 5.2%
- UK/Europe was up 10.7% (UK specifically was up 17.1%)
- The Caribbean was up marginally by 1.4%
- Asia was up 9.2%, and
- Latin America was down 4.2%

The travel industry in 2015 is very different from the industry of a few years ago. All stakeholders need to embrace these challenges and determine how best to adjust their strategies and mind-sets to continue to grow market share.

Some of these changes that now confront us are:

- The customer profile of travellers to Jamaica
- The demand for certain goods and services as standard fare
- The fact that hotels are trending up-market
- The rise of low cost airlines
- The changing ownership of the distribution system
- The way in which consumers digest information
- The prominence of the internet and social media

To what extent are we preparing our plants, our product offerings to facilitate these demands in an effort to attract and keep our customers? The allure of sun, sand and sea has long gone and travellers are now seeking out the 'bucket list' type vacations for which they can claim bragging rights among their peers. Everyone wants to be an influencer.

Having recognised the changing profile of the Jamaican intender, we also acknowledge that there are traditional target audiences we need to engage more aggressively. One such is the 2nd and 3rd generation Jamaicans, as we step up our Diaspora outreach.

Last year, we announced the relaxing of visa requirements from China and this winter we have started to see movement (January to April 2015 increased 44% over the same period 2014). Although this increase is coming from a small base, it is certainly worth the investment and continued efforts when we look at the vast potential of that market. China is now the number one outbound travel market in the world.

At JTB, we continue to promote Jamaica as a diverse product, as a destination that has something for just about everyone. Whatever your preference, whether for a small hotel, villa or apartment, a boutique hotel, an EP or all-inclusive property, if medium sized or even a large hotel, there is something for you in Jamaica. And certainly in the case of the small hotels, villas and apartments, there is now an opportunity to firmly take a hold on that market by offering the amenities which are in demand. The opportunities are truly boundless.

We all acknowledge that Jamaica is a great choice for MICE (Meetings, Incentives, Conferences, and Exhibitions/Events) travel, primarily as a result of our location and available airlift, especially from the U.S. We continue to pursue an aggressive strategy to keep Jamaica the preferred Caribbean destination in the Groups and Conventions market, including participation in a number of industry events along with our partners. So we have been making strides in the Incentives area.

We have not been doing as well in the Conventions market. In fact, Jamaica is not currently top of mind when meeting planners, particularly from the US are looking for destinations offshore to host conventions with large groups of participants. How then, can Jamaica become a part of that conversation? To this end, we have held meeting with the Convention Centre, major hotels and the Domestic Marketing Companies. We discussed and agreed on what needs to be done, including agreeing on the need for a unified message so hotels, DMCs and the MBCC can go to market. The JTB is committed to ensuring that Jamaica becomes a part of the conversation on hosting large conventions.

#### **CHANGE IN OWNERSHIP OF THE DISTRIBUTION SYSTEM**

- In this industry we have all been hearing for a while now that the travel agent business has been dying; on the contrary, however, they are still alive and kicking and doing business. Of course they had to embrace the changing landscape and had to figure out

what to do to survive. In fact, it is the JTB's Travel Agent Specialist programme that has played a significant role in reviving our US business this year.

- Tour operators have also been referred to as a dying breed for years, yet instead of rolling over and playing dead many have become vertically integrated. The US is our largest market, and it used to be that the majority of our visitors would book through the likes of Travel Impressions, Apple Vacations, GoGo Tours, Funjet among other such brick and mortar tour operators.
- Today, the single largest supplier of business from the US to Jamaica is Expedia, which itself acquired two of its competitors, Orbit and Travelocity, last year.
- The landscape has changed and we need to ensure that all are cognizant of these changes, so we can all make the necessary adjustments to grow our businesses.

### **RISE OF LOW COST CARRIERS**

- The landscape of travel is continually changing with the rise of low cost carriers and the merging of legacy carriers.
- Markets are opening as consumers have increased access to air travel.
- Consumers are now booking more and more of their travel directly online.
- The price points have decreased which also forces all the players to be more competitive.

This winter we had over 50,000 additional air seats from the US market.

The landscape has already registered significant changes – who is travelling, what they want, how they book and what airline they are flying on. These are some of the parameters we have had to consider when looking at achieving an integrated marketing campaign. Certainly one of the single most impactful adjustments has been the way in which the consumer engages with and takes in information.

### **ADVERTISING**

Research shows that consumers are changing the way they access travel information. As a result, the JTB has gone from a traditional, TV-centric approach to using a mix of digital, mobile, cinema and OOH (Out Of Home) strategy. We are still doing some TV and print albeit for a more targeted reach.

Advertising is perhaps the area where we have made the greatest change. Last year, we radically adjusted the advertising mix, and it is important to note that we had fairly consistent advertising activity throughout most of the year across various channels.



Our messaging was heavily targeted, using actionable Calls To Action to drive users to the *visitjamaica* website. Banners were geo targeted to our audience within our key markets. During the winter, markets were also targeted based on weather and flight duration. For the markets that have non-stop flights, the banners with that messaging were served up. The result was an increase in website activity in the geographical areas exposed to both television and web advertisement.

The US markets delivered satisfactory growth at the end of 2014 with impressive increases the first quarter of 2015. This is not all attributable to advertising, because the JTB team in the US did a fantastic job of taking back the streets! (Going back to basics). But changing up the advertising mix did have a significant impact. So we will be doing more of that.

- Going forward we will continue to look to reach the customers where they can be found, via the digital space. The use of the internet and social media is going to factor much heavier in our PR mix.
- Advertising will continue to explore its successes across multiple channels.
- National Impact + Local Approach: Leverage National Efficiencies (TV, Paid Search, Print) with local video and digital overlays in key arrivals markets and new opportunity test markets.
- Our strong allocation to digital media (38%) aligns with our target's media consumption and travel planning behavior.

We are working our marketing dollars to the bone and aiming to get the biggest and best bang for our buck.

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

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

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

**For calendar year 2014:**

- Total stopover arrivals of 2,080,181 increased by 3.6%
- Cruise passenger arrivals of 1,423,797 increased by 12.5%
- Gross foreign exchange earnings estimated at US\$2.248 billion, an increase of 6.4%.
- The average hotel room occupancy rate was 68.1%.
- Total capacity in the accommodation (excluding closed rooms) sub-sector stood at 26,888 rooms, of which 20,310 were in hotels and another 6,578 in villas, guesthouses and apartments.

## **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 document summarizes FCB advertising activities on behalf of the Jamaica Tourist Board for FY 2014/2015 in the United States, Canada and United Kingdom.

Our efforts this past year centered on enhancing the *Home of All Right* campaign which we launched in 2013 and expanding it into new platforms and arenas. We re-edited the TV ads with new voiceovers and visual enhancements, developed new print ads with the distinct calls to action, and generated updated posters and collateral materials. These all bore the modified tagline of "Home of All Right." 3,684 spots aired nationally and in targeted urban markets, specifically New York (reflected in the strategy "Take Back New York"). OOH ads followed a similar pattern of distribution while print ads became implemented in special interest magazines in our top 8 markets.

The campaign's digital presence received a facelift, with an updated targeting strategy and a steady stream of mobile and desktop banner ads and search content. We seized upon current events and weather related timing as opportunities to advance awareness of and preference for Jamaica's destination potential, while also partnering with a number of regional and national airlines. By affiliating with nearly two dozen co-op and sponsorship programs, we maximized our budget and concentrated our visibility in more specialized portions of the market.

The efforts of this year generated a 2% increase in arrivals in 2014.

## **Campaign Adjustments: ~~Get All Right~~ Home of All Right**

We launched the *Get All Right* campaign in October 2013. The campaign portrays Jamaica as providing a stimulating, rejuvenating experience beyond the mere beachside idleness offered by other Caribbean destinations. This cultural vibrancy elevates Jamaica from a top-tier Caribbean destination to a premier destination for global travel.

In June 2014, the JTB challenged us to modify the *Get All Right* tagline to portray Jamaica as having a unique, active draw, something only Jamaica possesses. By replacing *Get All Right* with *Home of All Right*, we demonstrate that Jamaica has transformative capabilities. Imbuing the country with this reputation creates the expectation that in order to have a life-changing trip, all one must do is show up; Jamaica does the rest, immersing you in a welcoming and energizing culture.

Meanwhile, we tinkered with the campaign's media allocation to best capitalize on the momentum of the campaign's first year. We settled upon 70% traditional media and 30% digital, finalizing the 2014-15 media plan on September 24<sup>th</sup>.

## **UNITED STATES**

### **Television**

In 2014, the original *Get All Right* campaign aired from April 21<sup>st</sup> to May 18<sup>th</sup> (:30) nationally with heavy-ups in New York, Chicago, and Philadelphia. The ads ran on channels such as CNN, ESPN, HGTV, and USA.

Following the *Home of All Right* revisions, the revised ads ran from October 21<sup>st</sup> to November 17<sup>th</sup>. In Q4 2014, 664 TV spots aired locally in New York, 313 locally in Philadelphia, 504 locally in Chicago, and 695 on national cable. In Q1 2015, 649 aired locally in New York, 179 locally in Philadelphia, 185 locally in Chicago, and 496 on national cable. In total, 2,175 spots aired in Q4 2014 and 1,509 in Q1 2015; cumulatively, 3,684 TV spots aired during these two quarters. These spot counts do not include any unwired networks like TelAmerica or The Band, as they aggregate local inventory into a national unit and therefore cannot be counted as spots.

The JTB also aligned with 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 2014/2015, the JTB engaged in various digital co-ops and sponsorship programs to increase audience reach and extend the budget. Digital partnerships/sponsorships included: US Airways, Southwest, Delta, Liberty Travel, American Express, Travel Impressions, Island Hideaways, Expedia, Cheap Caribbean, Pleasant Holidays, GoGo, World Travel, Bookit, Sears, Apple Vacations, and Bridal Guide.

In conjunction with these co-ops and sponsorships, FCB Garfinkel developed both digital banner ads and curated custom content in accordance with the integrated media strategy. These creative executions focused both on overall brand messaging and on targeted messaging like weddings/honeymoons. The buy was targeted to the “Caribbean intender” overlaying geo-targeting strategy. The messaging was developed to focus on the benefits of each market, such as non-stop flights, weather related events and opportunities for last minute booking. The banners were optimized in real-time depending on performance and centered on weather and flights. They ran on sites including the Wall Street Journal, USA Today, the New Yorker, Weather.com, and Fodor’s. Our custom content involved takeovers of Jamaican travel pages on websites like Thrillist, Trip Advisor, and The Daily Meal. The Thrillist partnership showcased custom Jamaica content online. Thrillist names Jamaica the next must-visit destination, in a fully branded content headquarters. They crafted 4 pieces of custom content that ran on this page. The partnership generated 4.7MM impression and earned 99,800 page views on the Destination Jamaica page.

### **Paid Search**

For 2014/15, we continued to use the national “always on” approach with heavy ups during key seasonality. The campaign averaged a click-thru-rate of 0.53% which is over 5x the industry benchmark of 0.08%.

### **Display Network**

In addition to standard Paid Search, we heightened Jamaica’s presence through Google Display Network Targeting. We developed a series of Display banners ads featuring specific components of Jamaican culture silhouetted against photos of Jamaica’s physical landscape. According to metrics collected between October 20 and December 13, this campaign generated 33,429,299 impressions and 70,419 clicks during the given time period. The desktop display accounted for 50% of the website visits in 2014, followed by 37% in mobile and 13% in tablet.

We also ran the :30 TVC as online video. There were 8.6 million views with an average video completion rate of 87%, which is 24% higher than the industry benchmark of 70%.

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

During late summer 2014, FCB Garfinkel and Finn Partners joined in partnership to promote the Bridal Expo, which takes place annually in Jamaica. The goal of the partnership is both to heighten awareness of Jamaica as a wedding destination and to attract future brides to the on-island Bridal Expo, which took place September 20-21. The program included a BRIDES Magazine Aug/Sep 2014 advertorial on weddings in Jamaica, an online sweepstakes awarding 10 trips for 2 to Jamaica for the Bridal Expo, and online display banners advertising the Expo and Jamaica, the latter two of which launched on July 1.

In the middle of winter, FCB Garfinkel crafted and launched train takeovers on three major suburban New York rail lines: PATH, Metro North, and LIRR. We developed train banners for the *Home of All Right* campaign that used weather-centric messaging to convert frustrations about winter weather into Jamaica bookings. Messaging incorporated vanity URLs and a \$100 off promotion through Expedia to motivate consumers to book. A huge number of visitors booked trips to Jamaica using this promotion, with their usage of the Expedia promotion serving as a metric by which to measure this campaign's success. The campaign generated more than 300 entries and 60 bookings using the code. The website saw an 86% increase in visits during the time the campaign was running.

A cinema campaign was also implemented this year, which consisted of showing the :30 TVC in theaters in New York, Chicago and Philadelphia. The campaign included a qualitative study conducted by NCM as added value. Results of the study showed very positive feedback. After seeing the commercial in theaters, the data shows a 75% increase in future consideration of travel to Jamaica. 81% of moviegoers recalled the ad, with 86% saying they liked it. There was a positive brand impact, with 81% of respondents recalling the ad agreed that "The ad made me think of Jamaica in a new way".

### **Print**

There were 3 executions of 8 publications with 2 insertions each. *Home of All Right* general campaign ads (particularly the Bikini, Scuba, and Golf ads) ran in *Bloomberg Business Week*, *Sports Illustrated*, *The Week*, *TIME*, *Food & Wine*, *Real Simple*, *Town & Country*, and *Elle Décor*. News publications ran these ads from January 5 to January 26 while the luxury magazines ran these ads from February 2 to March 20. Targeted ads were also featured in specialty publications like *Brides Magazine*, *PGA Tour Guide*, *Delta's Sky Magazine*, and *Funjet*.



### **Collateral**

Beginning in summer 2014, FCB Garfinkel updated the aesthetic of materials like display units and posters in order to reflect the switch from *Get All Right* to *Home of All Right*. The process was largely completed by the end of 2014. As in previous years, we designed and produced the 2015 Jamaica Desk Calendar, incorporating the *Home of All Right's* look and feel while featuring updated photographs and a new design. Calendars were produced in three different versions; US Generic, UK, and meetings/conventions. These calendars were delivered to JTB in December 2014.

### **Website**

As part of the campaign launch in 2013/14, FCB Garfinkel developed and launched a brand new version of VisitJamaica.com. The new design generates a sense of the energy of Jamaica and aligns the *Home of All Right* strategy throughout the digital platform. We completed the site in January 2014 and handed the reins 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. In 2014, the website saw 1,436K visits, an increase of 50.4% over 2013.

## **UNITED KINGDOM**

### **Television**

In the run up to the Commonwealth Games 2014, the UK aired JTB spots featuring Usain Bolt in partnership with Barrhead travel store in Glasgow, the host city of the Games. The TV spots chosen were "Stop" and "Speed", both of which portray Bolt running through some of the beautiful landmarks of Jamaica. The spots were updated with the new tagline and as such aligned with the new Home of All Right branding.

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

FCB Inferno's two unique digital campaigns were My Booking Rewards and the Daily Mail. For both, digital banners were created targeting online users from the travel trade who use the My Booking rewards site, to be interested in earning points with MY Jamaica Rewards (an online initiative to encourage travel traders to book holidays in Jamaica.) For the Daily Mail, whose website attracts the general public, the banner's call to action encouraged visitors to the site to click through for holiday deals available online.

FCB Inferno has also continued to handle JTB's Twitter, Facebook and Instagram accounts, promoting the island with relevant details of competitions and deals and posting about conversation topics appropriate for JTB social media followers. Since handling the JTB social

media pages, posts have reached more people (in some cases, an increase of 39.1%) than had been reached previously.

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

In October 2014, FCB Inferno prepared stands for the World Travel Market exhibition held annually in London. The goal of the creative was to attract members of the travel trade audience while also enticing prospective holiday goers to visit the island.

During the Commonwealth Games, along with the TV spots, a fleet of branded taxis drove the streets of Glasgow carrying JTB branding and holiday deals.

### **Print**

In 2014/2015, JTB print advertisements in the UK targeted a wide array of audiences, such as couples, bridal parties, families and diaspora. Publications included: The Telegraph, The Metro, Travel Weekly, TTG, Pride Magazine, The Jamaican Gleaner and Blue Water magazine.

Throughout the EU, JTB print advertisements could be found in bridal magazines in France (Mariée Magazine) and travel magazines in Poland and Russia (All Inclusive and TTG respectively).

### **Collateral**

UK awareness of Jamaica as a holiday destination was leveraged by the 2014 Commonwealth Games in Glasgow. JTB hosted a Jamaica House event; digital invitations, flyers, posters and a bespoke video were created for the event.

JTB also partnered with the Caribbean restaurant Turtle Bay, which has 16 locations across the UK. Restaurant visitors could apply for a chance to win an all-inclusive 7-night stay to the island in one of four luxury hotels (ongoing until August 2015). In the first month, more than 26,000 applicants applied to enter the competition. Postcards, menu designs, emails, and website content were created in relation to the competition, with the emails sent to those who had specifically requested to learn more about Jamaica and their chosen partners.

## **CANADA**

For the 2014/2015 fiscal year, no unique campaigns were reported in Canada.

## **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 2014 – March 2015** in support of the Jamaica Tourist Board's marketing efforts to keep Jamaica top of mind in the U.S., Canada and Latin American markets. The Agency has utilized a combination of traditional and non-traditional public relations tactics to increase awareness of Jamaica's vast and diverse tourism offerings.

### **Press Releases**

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

- A range of topics were showcased including on-island festivals, events, trade shows and conferences, seasonal packages, product launches, marketing programs, spokespersons, social media efforts, awards and accolades.
- Relevant press releases were translated and distributed to U.S. Hispanic and Latin America media.
- A sampling of these releases include:
  - *Discover Your Fear Factor On A Haunted Holiday In Jamaica*
  - *Surfers, Foodies And Audiophiles Welcomed To Jamaica This Summer*
  - *Travelers Can Check Off Their Bucket List In Jamaica*
  - *Reggae Marathon Offers True Jamaica Experience For Runners*
  - *Jamaica Adds Dedicated Volunteer Initiative Page To Official Website*
  - *An Insider's Guide To Port Antonio, Jamaica's Home Of Jerk*
  - *Top Three Reasons To Visit Jamaica This Valentine's Day*

## Press Trips

The Agency organized **23 Group Press Trips** covering niche areas and supporting JTB-sponsored events such as Annie's Revenge, Reggae Sumfest and JAPEX. Niche areas included bridal, culinary, music, history, arts and culture, blogger outreach, travel trade and more. A sampling of media outlets that were secured for group press trips included the following:

- *Los Angeles Times, Women's Health, Billboard, BRIDES, Ebony.com, Signature Hits on AOL, Examiner.com, Smarter Travel, Mommy Poppins, Tablet Magazine, Travel Weekly, Divine.ca, Food and Travel Mexico and many more.*

The team secured **7 Individual Press Trips**. A sampling of media outlets includes the following:

- *Examiner.com, NYC Pretty, Lugares Magazine, Air Canada Rouge- Inflight Magazine, South Bend's Lunkerville, Vai Pra Onda TV Show, Resto del Mundo and AAA TV.*

## Promotions

Arranged **23 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:** *NY Jets Flight Crew Calendar, BRIDES Magazine, Sherman's Travel*
- **Radio:** CBS Radio.com; WDHA-FM/Central New Jersey; WISX-FM Philadelphia; Sirius XM-Ziggy Marley Tour; WCCO-AM/Minneapolis
- **Retail:** FTD Flowers, Beringer Wines, BevMo!, GoodLife Fitness Centers
- **TV Broadcast:** Wheel of Fortune, Price is Right, Steve Harvey TV Show

## Advertorials

Drafted copy for **5 national, regional and trade advertorials** with outlets such as:

- *American Express Vacations, Questex Media Group, PGA Tour Magazine: Annie's Revenge Pro Am, Connecticut Jerk Festival Program and Classic Pursuits.*

## Events

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

- Caribbean Week NYC
- Caribbean Week in Toronto

- CORE: Club Event
- Curio by Hilton Launch in Jamaica
- Downtown Orlando Food & Wine Festival
- Fay Pickersgill Book Signing: “Fascinating Falmouth”
- Grace Jamaican Jerk Festival
- International Meetings Exchange
- Jamaica Bridal Expo
- Jamaica Invitational Pro-Am “Annie’s Revenge”
- Jamaica Investment Forum
- Jamaica Jazz & Blues *Art of Music* Festival
- JAPEX 2014
- Kingston City Run
- Maxi Priest Listening Party
- MoBay City Run
- New York Times Travel Show
- New York Urban League Football Classic
- One Love Rewards ‘White Affair’
- Port Authority Trans-Hudson (PATH) Activation in New York City
- Penn Relays, Philadelphia, PA
- Reggae Sumfest
- RESERVEDnyc’s Chefs of the Caribbean
- Round the World Clipper Race
- Reggae Wine Festival
- Strength of Nature Annual Event (hosted in Jamaica)
- Tourism Outlook Seminar
- U.S. Open Taste Of Tennis

#### **Major Broadcast Initiatives:**

- *WLNYDT Live from the Couch* (April 28, 2014) – “Marvelous Metallics” – Christine Bibbo, blogger and contributing style editor to *Life & Style*, appeared on *Live from the Couch* to discuss the season’s metallic fashion trends.
- *Fox-CT* (May 15, 2014) – “Daytrips and Destinations Travel & Family Fun Expo” - Jamaica Tourist Board Business Development Manager Christopher Dobson appeared live on the program at the Daytrips and Destinations Travel & Family Fun Expo.

- *Fox 5 News New York / MyFoxNY.com* (June 2, 2014) – “Caribbean Cooking” – Jamaican sisters Suzanne and Michelle Rousseau appeared live on *Fox 5 New York* for a special chef demonstration segment during Caribbean Week in New York City.
- *WNYC.org / National Public Radio - The Salt* (June 10, 2014) – “Don’t Be a Jerk. There’s A Lot More to Island Cooking” – Jamaican sisters Suzanne and Michelle Rousseau were featured in a live radio interview to promote their new cookbook of Jamaican cuisine, *Caribbean Potluck*.
- *Pix11 Morning News* (July 15, 2014) – Jamaica artist Maxi Priest appeared live on the program to promote the Grace Jamaican Jerk Festival in New York. A live cooking demonstration also featured Jamaican cuisine by Grace Representatives.
- *CBS Better Mornings Atlanta / CBS46.com* (August 5, 2014) - “Caribbean Cooking” - Jamaican sisters Suzanne and Michelle Rousseau appeared live on the show promoting their new cookbook, *Caribbean Potluck*, and Jamaica cuisine.
- *WOR-710 The Travel Show with Arthur and Pauline Frommer* (August 31, 2014) – Jamaica’s new Director of Tourism, Paul Pennicook, was featured on the radio program to discuss new developments in Jamaica.
- *WNBC Steve Harvey* (September 8, 2014) – “Family Bucket List” - Jamaica was featured on the Emmy award winning show as part of a special segment where a family with six children, who have never been able to take a vacation, were given a trip to Beaches Resort in Jamaica.
- *WXIA-TV Atlanta and Company* (February 10, 2015) – Jamaica Tourist Board Business Development Manager, Tamara Christie, appeared live with Delta Vacations representative and a local reggae singer, to discuss tourism offerings in Jamaica, including resorts, cuisine, spas, golf, etc.

## Social Media

**Social Media Strategy and Digital Demand Mapping** – Finn Partners Digital Team created and submitted a comprehensive Social Media Strategy and Digital Demand Mapping in November 2014. The Strategy is intended to cover the organization’s global social activations and to be



utilized as a framework to nurture and sustain the JTB's efforts in the digital space. The Digital Demand Mapping uncovered priority topics and corresponding keywords, established baselines using historical JTB metrics and competitor analysis and identified influencers.

**BevMo! Jamaican Summer of Rum Promotion** – Agency secured social media promotion with BevMo, the leading specialty beverage retailer on the west coast, for two months reaching over 3.5 million people. Facebook apps, e-mail blasts, social media advertising were components of the program.

**Shermans Travel Online Campaign** – Agency secured the national month-long social media program with Shermans Travel which was cross promoted on Liquor.com and Women's Health, offering online readers a grand prize trip to Jamaica Inn. All websites and social media posts were aimed to drive traffic to ShermansTravel to enter. Audience reach was over 60,000.

### **Special Projects**

**CORE Club** – The Agency secured an opportunity for Destination Jamaica to be highlighted at the CORE Club, an exclusive club, for high net worth individuals, in Manhattan on Wednesday, June 11, 2014. Through partnerships, the Agency was able to showcase authentic Jamaican music, cuisine, culture and history. Partners included: Grammy Artist Shaggy, Chef Nigel Spence, Grace Foods, Red Stripe, Blackwell Rum and Island Outpost. Media attendees included *The New York Times*, *The Wall Street Journal*, *Travel + Leisure*, *ET / OMG Insider*, *ForbesLife*, *Canadian National Geographic*, *TODAY Show*, *Travel Weekly* and *UPTOWN magazine*. New York based JTB Business Development Manager, Kenton Senior was on hand, along with Finn Partners staff, to answer destination questions and facilitate the evening's agenda.

**Diaspora Public Affairs Campaign** – The JTB completed the *Come Get All Right* at Home Diaspora public affairs campaign. The campaign, which was undertaken in three phases, included radio and print advertising in the key Diaspora markets: New York tri-state, Washington, D.C. tri-state, Florida, Atlanta, Chicago, Los Angeles and Toronto.

**JTB Voluntourism Initiative**— The Agency is working with the Ministry of Tourism and Education to identify opportunities for the JTB to bring volunteers to Jamaica to assist with current and ongoing MOE initiatives within public schools. The Agency drafted copy for the JTB voluntourism webpage and distributed an announcement press release in late 2014.

**Jewish Jamaica**— The Agency continues to promote Jewish Heritage in Jamaica, which includes an annual press trip, media relations and cultivating partnerships. In addition, Finn Partners worked with Jamaica’s on-island Rabbi to provide PR opportunities for the new Chabad in Montego Bay and began working with JTB Business Development Manager, Marcia Sinclair in New York, to develop Jewish Jamaica travel packages for summer 2015.

**Disabilities & Awareness Initiative**—In September 2014, the Agency submitted a program overview of conducting Disability Etiquette and Awareness Training and recommendations for Jamaica to improve its accessibility for this significant market. Discussions continue between the JTB and JHTA.

**Editorial Destination Photo Shoot** —The Agency submitted bios of several local Jamaica photographers and their portfolios for JTB consideration to conduct a destination editorial photo shoot. JTB chose one of the recommended photographers to capture scenery and attractions in the major tourism hubs of Jamaica. The photoshoot took place in January 2015.

**Reggae Month** – Finn Partners secured radio promotions to support Reggae Month activities in February 2015 on four (4) radio stations, including: WWPR-FM/NY, WUSL-FM/Philadelphia, WGCI-FM/Chicago, and WMIB-FM/Miami. Listeners could enter for a chance to win a trip to Jamaica to attend the Bob Marley Tribute concert in conjunction with Bob Marley’s 70<sup>th</sup> anniversary. The Agency secured and escorted three North American journalists to attend and cover Reggae Month events on-island, including: *Billboard Magazine* (Circ.: 1,000,000), *LargeUp.com* (UMV: 65,000) and *SiriusXM Radio*.

**Radio Remote Program** – The JTB sponsored a radio remote program in September 2014 that took place at Jewel Paradise Cove and Jewel Runaway Bay. The Agency worked with Clear Results Media to secure 15 U.S. stations and 4 UK stations to broadcast live from Jamaica for two days. The U.S. markets included: Philadelphia, Detroit, Long Island, Boston, Salt Lake City, Los Angeles, San Francisco, Salt Lake City, New York, Atlanta, Baltimore, Cincinnati, Minneapolis, Indianapolis and Nashville. Finn Partners secured activity providers including Dunn’s River Falls, Mystic Mountain, Dolphin Cove and Chukka, worked on logistics with Jamaica Tours Limited and provided on-site support.

**Jamrock Summer** – CBS Radio.com partnered with the Jamaica Tourist Board to promote the *Jamrock Summer – 90 Days, 90 Ways* initiative with a multi-touch point digital campaign that drove consumer engagement, delivered clicks, and generated leads from a qualified audience. The campaign was promoted in six (6) key markets on Radio.com CBS Network’s highest

engagement digital assets: 24-hour ownership and :30 streaming commercials on Radio.com, plus banner ads on local radio websites targeting travel enthusiasts.

**PATH Station Activation** – Finn Partners staged a pop up Jamaican Oasis consumer event at one of New York City’s major commuter rails -- the PATH train station on 33rd Street and 6th Avenue on Thursday, March 19th. Finn Partners secured NY radio station KTU-FM to promote event and provide on-air talent at event. On-site elements include the JTB Green Screen for photos with a Jamaica background, Jamaican guitarist entertainment and branded giveaways.

**Jamaica Patty Day** – Agency created and implemented a promotional plan for Jamaican Patty Day in Toronto, Canada which celebrated its 30th anniversary on February 23rd. The agency delivered hot Jamaican patties along with the press release to key Toronto radio shows in order to encourage radio host’s banter about Patty Day and Jamaica on the morning and afternoon drive shows. All media outlets were encouraged to share their love of patties with the hashtag #pattyday.

### **Written Materials**

- Produced, designed and distributed quarterly eNewsletters *Home of All Right* and *Meet You in Jamaica* to travel specialists, media, and MICE market in the U.S. and Latin America. 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 a comprehensive report on the outcomes and next steps from the various division meetings, including education, healthcare, voluntourism, Jewish heritage and media interviews.
- Provided support for JHTA President Evelyn Smith in conducting research on positive and negative tourism stories for a lecture series at UWI in April.
- Prepared nominee letters for the winners of the Marcella Martinez and Marcia Vickery-Wallace awards.

- Drafted remarks and corresponding PowerPoint presentation for the Director of Tourism for the JHTA Annual General Meeting.
- Prepared presentation for Hon. Dr. Wykeham McNeill, Minister of Tourism & Entertainment for the China Outbound Travel & Tourism Market (COTTM) in Beijing. Presentation was submitted to China for translation.
- Wrote “Come Home” advertorial for N.E. District Sales Manager Marcia Sinclair for Taste of the Caribbean’s Jerk Festival.
- Drafted responses on behalf of Deputy Director Sandra Scott for Destination Jamaica feature highlighting Ocho Rios.
- Prepared talking points for Tourism Director’s radio interview with Pauline Frommer.
- Wrote destination copy and profile for World Routes Conference.
- Prepared speaking points for Deputy Director of Tourism Sandra Scott for Bridal Expo and accompanying PowerPoint presentation.
- Created PowerPoint presentation and speech for Director of Tourism’s participation in the ICAO Air Transport Conference.
- Prepared Director of Tourism remarks and PowerPoint presentation on “Partnering for Prosperity...The Changing Face of Destination Marketing” for the Tourism Outlook Seminar.
- Prepared facilitator remarks for Deputy Director of Tourism Sandra Scott for Tourism Outlook Seminar.
- Prepared message for Tourism and Entertainment Minister Hon. Dr. Wykeham McNeill, for TV Broadcast to mark the 2014/2015 Winter Tourist Season.

### **Jamaicans Overseas Support**

- American Friends of Jamaica (AFJ) annual gala
- Children of Jamaica Outreach (COJO) scholarship gala & awards
- American Foundation for the University of the West Indies (AFUWI)

- 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

- *Orlando Sentinel*—May 7, 2014—“Six Romantic Honeymoons: Three If by Land, Three If by Sea”
- *Huffington Post*—May 15, 2014—“Psst! Wanna Elope?”
- *The Knot*—July 1, 2014—“Ultimate Honeymoons and Destination Weddings”
- *Destination Weddings and Honeymoon*—February 13, 2015—“Jamaica. Part Reggae Playground, Part Tropical Paradise, All Irie”
- *Bride*—March 1, 2015—“Getaway To Negril”
- *Yahoo News*—March 5, 2015—“Don’t Take A Vow Of Poverty: Go To These Affordable Honeymoon Resorts Instead”

### Culinary

- *Fox 5 New York*—June 2, 2014—“Caribbean Cooking with Suzanne and Michelle Rousseau”
- *Luxury Retreats Magazine*—July 21, 2014—“The ABC’s of Jamaican Cuisine”
- *The Daily Meal*—December 20, 2014—“10 Undiscovered Gems in Jamaica”
- *Honest Cooking*—January 26, 2015—“How To Eat Like a Local in Jamaica”
- *The Culture-ist*—February 20, 2015—“Stush in the Bush: A Tropical Farm-to-Table Experience in the Hills of Jamaica”
- *USA Today*—April 20, 2015—“Foodie Favorites: The Best Caribbean Resort Restaurants”

### Family

- *Fox CT*—May 15, 2014—“Daytrips and Destinations Travel and Family Fun Expo”
- *USA Today*—April 1, 2014—“Top Family-Friendly Attractions in the Caribbean”
- *Leisure Group Travel*—June 1, 2014—“Volunteer Vacations Let Families Have Fun While Giving Back”
- *Sun Sentinel*—September 3, 2014—“Active Family Vacations in Negril”
- *Mommy Poppins*—January 4, 2015—“Our Best Family Travel of 2014: Top Family Resorts, Beach Towns and Super Cities”
- *Chicago Parent*—March 25, 2015—“5 Quick Spring Break Destinations”

## General Travel

- *Islands*—April, 10, 2014—“10 Reasons Why You Should be Staying at These Jamaican Villas Right Now”
- *About.com*—June 3, 2014—“The Riu Palace, Jamaica”
- *Where*—May 13, 2014—“Get All Right In Jamaica”
- *The New York Times*—November 7, 2014—“8 Distinctive Caribbean Inns for a Range of Budgets”
- *Associated Press*—March 15, 2015—“Jamaica Hopes Jewish Tourism Can Help Fading Community”
- *Yahoo News*—April 22, 2015—“Jamaica Cruise Ship Brings "Record Number" of Chinese Tourists”

## Music

- *Fader*—July 2, 2014—Reggae Sumfest 2014: Montego Bay’s Largest Dancehall Party”
- *AOL.com*—August 4, 2014—“Sean Paul and Tessanne Chin Hit the Stage at Reggae Sumfest 2014”
- *Huffington Post*—August 4, 2014— “Wiz Kalifa and Beenie Man Discuss Their Music at Reggae Sumfest”
- *Examiner*—February 6, 2015—“Ticket Stubs: Jamaica Jazz & Blues Festival - The Art of Music”
- *Rolling Stone*—February 9, 2015—“Backstage at Jamaica's Joyous Bob Marley Birthday Celebrations”

## Sports

- *World Golf*—April 29, 2014—“Montego Bay Golf Courses on Show During Jamaica Invitational Pro-Am”
- *Golf Getaways*—June 1, 2014—“Jammin’ in Jamaica, Iberostar-Style”
- *New York Jets*— September 19, 2014—“Adventures in Jamaica”
- *Sun Sentinel*— September 3, 2014—“ “Active family vacation in Negril”
- *Societe Perrier*—November 4, 2014—“Annie Vazquez Takes You On An Action-Packed Tour of Jamaica”
- *Smarter Travel*—December 13, 2014 — “Caribbean Adventures Worth Leaving Your All-Inclusive For”
- *Caribbean Today*—January 20, 2015—“Mobay City Run Set To Enhance Jamaica’s Sport Tourism Efforts”



## Trade

- *Travel Agent Central* – June 2, 2014—“The Hottest New Hotels of 2013”
- *Travel Pulse* – July 8, 2014—“Pennicook To Replace Lynch as Jamaican Tourism Director”
- *Travel World News* –September 9, 2014—“Explore Jamaica's Cultural Heritage On Next Vacation”
- *Travel Weekly*—October 14, 2014—“Jamaica Lists Voluntourism Opportunities”
- *Travel Pulse*—November 21, 2014—“Inside a Jamaican Rastafarian Village”
- *Travel Agent Central*—January 21, 2015—“Three Reasons to Travel to Jamaica for Valentine’s Day”

## Canada

- *Crave Online*—May 16, 2014—“Are We There Yet? Jamaica and Business Travel”
- *Metro News*—July 22, 2014—“All Night Adventures in Reggae at Sumfest 2014”
- *Chic Darling*—July 8, 2014—“Hotel Review: Rockhouse Hotel Negril Jamaica”
- *Dreamscapes* – September 15, 2014—“A Caribbean Medley: Plan Your Dream Vacation”
- *Globe + Mail*—October 15, 2014—“On the Radar: Montego Bay, Jamaica”
- *Huffington Post Canada* –November 7, 2014—“You Can Have a Healthy Vacation and Have Fun at the Same Time”
- *Canada.com*—November 25, 2014—“Travel Top 5: World’s Best Street Foods”

## Hispanic

- *El Nuevo Herald* – September 6, 2014 – “Seis Lugares para Visitar en Kingston”
- *Long Island Al Dia* – October 8, 2014 – “Cuando Colón Descubrió Jamaica”
- *El Sentinel* – November 8, 2014 – “Vivir a Un Buen Ritmo”
- *Living Mi Vida Loca* – December 20, 2014 – “Top 10 Things to Do in Jamaica”
- *Spoiled Latina* – February 25, 2015 – “Jamaica Me Miss You”

## Latin America

- *El Financiero* – April 10, 2014 – “36 Horas en Kingston”
- *Clarín Viajes* – September 14, 2014 – “Sonrisas Tropicales al Ritmo del Reggae”
- *El Tiempo* – November 12, 2014 – “Aventura y Descanso en el Caribe”
- *El Universal* – January 20, 2015 – “Febrero Será el Mes de San Bob Marley”
- *El Nacional* – January 25, 2015 – “Jamaica Hechiza con sus Contrastes”

## Other

- *Examiner.com* —August 6, 2014—“Wanderlust Wednesday: Irie in Jamaica”
- *Huffington Post*—September 14, 2014—“Light Your Fire: Sexiest Caribbean Aphrodisiacs”
- *USA Today* —October 23, 2014—“Haunted Caribbean: Go if You Dare”
- *Yahoo!*—November 25, 2014—“Incorporating 'Voluntourism' Into Existing Holiday Travel Plans”
- *Lucky*—January 12, 2015—“Collection The MoDA”
- *Honest Cooking* —February 2, 2015—“Ultimate Super Bowl Food: Twice-Fried Plantains”
- *The Jewish Voice* —March 25, 2015—“Strictly Kosher, Mon: Jewish Life Flourishes In Jamaica”
- *Conde Nast Traveler*—April 24, 2014—“Night Clubs and Bars in Unexpected Places”

## Media Impressions

Total media impressions by region are as follows:

- United States: **1,987,236,689**
- Canada: **64,902,885**
- Latin America: **103,275,593**

## **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.**

## **Introduction**

McCluskey International (MI) was 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 from April 2014 – March 2015**

- **£3,284,219** worth of coverage generated
- **244** pieces of media coverage generated

## **Key PR Activations**

### **London: Race Finish of ‘JAMAICA Get All Right’ in the Clipper Round The World Yacht Race**

- The Clipper Round The World Yacht Race provided the perfect platform to showcase Jamaica to a global audience and the ten month round the world race came to an exciting finish in London in July 2014. JTB 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 participation of the Jamaica Tourist Board's yacht, Get All Right, at St Katherine's Docks at the end of the race and to provide some Jamaican flavour to the race finish festivities.

**London Race Finish of 'JAMAICA Get All Right' in the Clipper Round The World Yacht Race:  
Results (provided by Clipper RTW)**

- Total coverage value for Jamaica £8,964,536
- 1,016 pieces of coverage generated
- £409,130 value and 62 articles for Errol Flynn Marina
- [https://www.youtube.com/watch?v=Bb\\_LW07dHEI](https://www.youtube.com/watch?v=Bb_LW07dHEI)

**Island Vibes Newsletter**

- **Recipients:** 5,000+ each month
- **Total opens:** 25%
- Content for the newsletter on a monthly basis includes:
  - JTB News
  - Travel Agent News
  - Jamaica Rewards
  - Competitions
  - Events and Attractions
  - Hotel News
  - Special offers and packages

**Press Trips**

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

- ITCM (Michelle Chenery) – March 2015
- New! Magazine (Lisa Blake) – April 2014
- Woman (Lisa Pope & Laura Jackson) – May 2014
- Lonely Planet (Sarah Reid) – June 2014
- STV (Storm Huntley + 1) – June 2014 – Pre Commonwealth Games
- Beau Travel (Eugene Costello) – June 2014
- BBC Travel Show (Greg McKenzie) – July 2014
- Daily Express /Saturday Magazine (Dominique Hines) – July 2014
- Clash Magazine (Reshma B) – July 2014 – Reggae Sumfest
- Financial Times – How to Spend It (James Henderson) – September 2014

- The Sun – Graham Warwick – October 2014
- The Surrey Advertiser Series (Marnie Wilson) – October 2014
- Cruise International (Rosie Shelley) – October 2014
- ELLE Wedding (Leisa Barnett) – November 2014
- Running Fitness (Steve Wright) – December 2014 – Reggae Marathon
- Run 247 (Paul Stanley) – December 2014 - Reggae Marathon
- Six Out of Ten Magazine (Laura Zito) – January 2015
- Travel Weekly (Jo Booth) – January 2015
- Silver Travel /Epoch Times/ Just about Travel (Reza Amirnia) – January 2015 Jazz & Blues
- Rough Guides (AnneMarie Gregory) – February 2015 Bob Marley 70<sup>th</sup>
- The Huffington Post (Kris Griffiths) – February 2015 Bob Marley 70<sup>th</sup>
- OK.co.uk )
- Express.co.uk )
- BBC Local Radio stations )
- BA Inflight )
- The Voice )
- Turnstyle Online Portable )
- Robbo Ranx Radio ) Ray Paul & Robbo Ranx, - February 2015 Bob Marley 70<sup>th</sup>

#### **Faithworks 2014 - Faith Based Tourism**

- Following a year of liaison between Faithworks founder Bishop Wayne Malcolm, JTB and McCluskey International, The Faithworks Summit took place at Montego Bay Convention Centre, June 11 2014.
- It was anticipated that at least 500 delegates would attend in June 2014 from across the Caribbean, US, UK and Africa, however that wasn't the case. Most of the delegates were local or from the USA.
- Opportunities were leveraged through the relevant media outlets to encourage church members to visit Jamaica while the Bishop was there
- Faith-based media and Diaspora UK media were targeted with releases generated about and from the Summit
- The following UK diaspora media were invited to attend the conference in 2014 in order to provide coverage of the event but, due to lack of UK participants, as promised, they didn't cover it
  - Premier Radio: UK's largest Christian radio station (10m listenership)
  - The Voice: UK's leading Diaspora newspaper (30,000 readership)

### **Commonwealth Games**

- Jamaica took centre-stage at the Commonwealth Games last year, thanks to its world-class athletes
- The hype around Jamaica's athletic superstars meant that this event was a key one to capitalise on in the UK
- Activities that capitalised on the Commonwealth Games included:
  - Jamaica House 2014 in Glasgow – Open two evenings during the Games
  - Press and Travel trade clients invited
  - Five Sponsors – STV, Virgin Atlantic Airways, Secrets Resorts, Jewel Resorts & Sandals Resorts
  - Athletes attended and gave the House a great atmosphere and much publicity.
- PR campaign co-ordinated via the UK highlighting Jamaica as an attractive travel destination through showcasing the Island's sports talent participating at the games: Targeting sports, news, travel and lifestyle media; Multimedia collaterals produced in order to share video and images that can be disseminated across social and digital media.

### **World Travel Market 2015**

MI supported the JTB pre-WTM, during WTM and post event, on the following:

- Liaised with JTB re: focus for WTM and draft a PR strategy to support it
- Draft all WTM press pack material, including MOT and DOT's speeches
- MI to distribute to online trade media and update client on expected results
- Liaise with the JTB to manage MOT and DOT's diary at the event
- Set-up interviews with key media for MOT during event
- Photographs from WTM to be disseminated to UK media and JTB Kingston

### **Social Media**

- MI continued to create and manage a quarterly social media calendar in order to share events, new images, competitions, partner news and event updates to promote on instagram, Facebook and Twitter, thus driving user engagement and visitors to the VisitJamaica website
- UK facebook: [www.facebook.com/visitjamaicauk](https://www.facebook.com/visitjamaicauk) - 9,752 followers
- UK Twitter: @jtbuk – 1111 followers
- UK Instagram: [instagram.com/visitjamaicauk](https://www.instagram.com/visitjamaicauk) – launched February 2014



- MI drove content for YouTube through short films showcasing key events such as the Jamaica House 2014 at the Commonwealth Games, Clipper Round the World Yacht Race.

## **SALES ACTIVITIES**

### **US MARKET**

Each year the JTB approaches the US market with optimism for success in increasing arrivals through our various efforts and the participation of our travel partners on the ground floor, who passionately sell Jamaica to their clients. However, we were challenged with Q1 2014 which got off to a rocky start. To our dismay Q1 arrivals from the US were down; Q2 fluctuated with increasing and then decreasing arrivals and the projections for Q3 did not look promising.

The travel landscape has changed dramatically. There is a general view that with the clutter of a multitude of online travel offerings, the customer was overwhelmed with information in making their vacation choices and bookings. Ultimately, the confusion has motivated customers to go back to their trusted travel agents to help them plan their vacations.

We realized that we had to look at our planned tactics to ensure that the US would deliver the arrivals that would wrap up 2014 with an upswing.

### **TACTICS**

1. We renewed our strategies with an emphasis in engaging with our retail travel agents. We launched our 'Taking Back The Streets' campaign which is a series of events consisting of seminars, sales calls blitzes, webinars, fam tours, in-house training - tour operator partners and reservation agents/call centers. The events were conducted in all of our major and secondary markets and the results so far have been successful. Q4 arrival numbers increased and the trend remained through Q1 2015.
2. Our 2015 plans will continue to focus on our efforts on our 16,000 Jamaica Travel Specialists and in continued recruitment of other agents to become graduates.
3. All JTB staff and retail travel agent partners were encouraged to use the new advertising campaign tagline - Jamaica, 'Home of All Right' - in all communications, programs and efforts to ensure that the message is streamlined and supportive of the proposition that Jamaica is THE place to visit. As an example of this – all JTB presentations are branded

Jamaica, 'Home of All Right' events and the Jamaica Night functions have become Jamaica 'Home of All Right' Nights.

- Fam Trips were key as we continued the process of educating our agents on Jamaica. The designated Fam Tour Months are September and October.
- Education/Training – In-house training of tour operator partners' reservations agents – tour operator call centers, JTB-hosted seminars/updates, familiarization trips, webinars, and presenting sponsorship of trade associations events, etc. will continue to sharpen selling skills.
- Digital Support for consumer events  
We create digital campaigns for consumer shows which encourages people to share their favorite indulgences with the hashtag #visitjamaica. "The idea is that we start the conversation online building mainstream interest in the marketplace, touching the right persons where we can have highly engaged experience at the events and then in turn have them share again online with the #visitjamaica hashtag .  
In addition, people can visit the campaign's microsite to sign up for email notifications, trip giveaways, newsletters and offers that will alert them to the Jamaica brand promise. Where relevant the emails and microsites also drive traffic to owned and partner e-commerce sites and travel agent listings.
- Winter Webinar Series  
The Jamaica Travel Specialist program Webinar series brings together tour operators and tourism partners with travel agents to discuss new opportunities. The Webinars are always free and offer travel professionals a chance to hear best practices, offers, specials, new developments about winter season packages for travel to Jamaica.  
The biweekly Winter Webinar series launched on October 29, 2014 and commenced on December 11, 2014. 11 Hotels, VIP Attractions and 1 Tour Operator presented in the series. An average of 143 travel agents attended each session with more than an 85% retention rate. A total of 2,104 travel agents have viewed the supporting webinar series online magazines.

#### **AIRLIFT UPDATE**

Airlift is the main ingredient in growing vacation travel from any market. In 2014, of the total summer seats of 1,347,564, only 66% was used to produce the 888,503 visitors. In 2015

summer, the USA seats will be 1,359,335, an increase of 11,771 seats. Needless to say there are more than enough seats to achieve our targets for summer 2015.

The merger of giants American and USAirways has not affected service to Jamaica as there was no overlapping. The merger will strengthen our vacation distribution as their vacation divisions have also merged, to form American Airlines Vacations.

These strengthened Airline tour divisions, together with the traditional tour operators and online travel companies, are strong partners of Jamaica selling our vacations at increased daily rates, providing a much better return on the investment made by our hotels, apartments and villa owners to improve their product.

### **JAMAICA TRAVEL SPECIALIST**

The Jamaica Travel Specialist, One Love Reward training programme continues to be the nucleus of the working relationship between the US sales team and the travel agent community. At the end of April 2015, there were over 16,000 graduates of the programme. Incentives and rewards are currently in place, with the popular Jamaica Travel Specialist Online Store, launched in March 2013. Other incentives include: Monthly award of \$300 to the top-booking Jamaica Travel Specialist, a downloadable graduate diploma, on-island VIP service for graduates of the program, preferred agent listing on the official [www.visitjamaica.com](http://www.visitjamaica.com) website, VIP familiarization tours, Jamaica's quarterly e-newsletter, and the coveted opportunity to attend the awards ceremony for the top 50 Jamaica booking agents.

We are in transition and will be moving management of the program to the more technologically sound Travel Agent Academy. One of the primary reasons is the wealth of knowledge and products to support the continued growth and offerings to our travel agent community and product partners.

We continue to promote the program to our supplier partners with the aim of increasing participation.

### **TRAVEL AGENT OUTREACH**

The travel agent community continues to play an important role in our sales efforts. We hosted a variety of activities in the United States:

- Between September 2014 and March 2015, we conducted a series of seminars and joint sales calls with supplier partners visiting more than eleven hundred agencies and hosted product dinner presentations for over one thousand travel agents.

- Over 2,200 reservation agents in 61 cities were trained on how to effectively sell Jamaica's tourism product.
- More than 13,000 agents were reached through some 60 trade shows.

### **FAM TOURS**

- In 2014, we hosted over 450 agents on 36 fam tour rotations. For 2015 we plan on hosting 15 fam tour rotations of some 400 agents. In addition to JTB organized fam tours, we will partner with some tour operators in hosting their top travel agents fam trip/awards weekend in Jamaica.

### **CONSUMERS**

- Over 730,000 consumers experienced Jamaica's tourism product through music, food and literature distribution at some 95 events.

### **DIASPORA OUTREACH**

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

## **GROUPS AND CONVENTIONS**

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

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

#### **Target markets are :**

**Primary :** Incentive Travel and Corporate meetings

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

High activity in the Groups Department continued with emphasis placed on highlighting the Montego Bay Convention Center. Jamaica continues to be a great choice for MICE (Meetings, Incentives, Conferences, and Exhibitions/Events) travel, as a result of our location and available airlift primarily from the U.S. We continue to pursue an aggressive strategy to keep Jamaica the preferred Caribbean destination in the Groups and Conventions market, including participation in a number of industry events along with our partners.

## **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, Brazil, Colombia, Ecuador, Chile, Argentina, and Peru
- Secondary markets: Panama and Costa Rica

Among the activities conducted during 2014/15 were **seminars, trade shows and familiarization trips.**

The 14/15 fiscal year saw an array of opportunities and new challenges in the marketplace. From growing competition to an intensification of the use of social media by consumers, the marketplace shifted. New market participants and new leverageable opportunities allowed the JTB to gain ground in the region during the year, while positioning itself for a new sales theme and evolving strategic approach in the 15/16 fiscal year.

As competition in the Latin America grows and competitor budgets increase, Jamaica Latin America will focus on differentiation. Jamaica has the distinct gift of being truly a unique destination. While there are many beach and island vacation choices for the Latin American consumer, none come close to offering the "Home of All Right" spirit, culture, music, food,

people, and experience that Jamaica offers. Our initiatives for this coming fiscal year will focus on the “Home of All Right” vacation experience of Jamaica in our sales calls and trainings.

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

## **OBJECTIVES**

- Increase YOY visitation from Latin America
- Increase knowledge of new & existing amenities in Jamaica
- Create new markets for Jamaica
- Position Jamaica top-of-mind as a vacation & MICE destination
- Increase media exposure for Jamaica

## **MARKET STRATEGY**

- Develop New Airlift Opportunities
- Increase Media Presence
- Focus on the “Home of All Right” Jamaica Experience
- Develop New “Home of All Right” Experiential Product Opportunities
- “Home of All Right” Sales Drive & Theme

## **TACTICAL STRATEGY**

- Focus on our key markets:
  - Mexico, Brazil, Colombia, Ecuador, Chile, Argentina, and Peru
- Leverage COPA relationship
- Expand co-op relationships with tour operators and travel agencies
- Create in-market strategic partnerships for maximum leverage

- Increase co-ops with in-destination partners
- Increase product sales and training seminars
- Create sales incentive programs
- Drive travel through market motivators
- Drive experiential travel
- Leverage word-of-mouth through social media

## **CANADA**

In 2014, for the ninth consecutive year, the Jamaica Tourist Board's Canadian operation was honoured with the coveted Agents' Choice Award for the Favourite Tourist Board in Canada.

2014 produced record breaking numbers from Canada. However, from fall of 2014 the Regional Director was forecasting a soft 2015 winter. This was because of economic challenges in Canada combined with the higher average daily rate being enjoyed in Jamaica.

### **Travel Agents**

- We continued our incentive program for agents where they won monthly prizes for bookings to Jamaica. This was part of the ongoing Jamaica Travel Specialist Programme.
- Canada produced 16 of the top 50 selling Jamaica Travel Specialists for 2014.
- We participated in over 75 trade shows and engaged over 17,056 retail travel professionals directly.
- Fam trips are still very effective. Agents sell what they have experienced. We hosted 190 travel agents on 15 fam tours.
- We engaged over 20,000 travel agents through the very popular Island Vibrations quarterly newsletter.
- We continue to utilize social media to increase our interaction with trade and consumers.

### **Consumer Direct**

- We participated in over 45 consumer shows and engaged approximately 2.9 million consumers.
- This includes interacting with 92,300 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 3 million consumers.
- Jamaica was showcased across Canada at GoodLife Fitness locations and on GoodLife's social media platforms for the month of January, 2015 with a reach of over 1 million.

### **Diaspora**

- Participated in 11 diaspora initiatives across Canada with a direct reach of 20,000 diaspora members.

## **UNITED KINGDOM**

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

Fam trips	6 Fams	90 trade partners (group planners, travel agents and tour operators) were hosted across six fam trip visits focusing on MICE, luxury, romance and general product during 2014-15. Five of the agents were participants at the JTB year end incentive "The White Affair" which JTB London joined for the first time. Fifteen participants were highly qualified MICE buyers on a jointly hosted fam by the JTB and Sandals and Beaches Resorts.
Trade Seminars	15 events	Over 2,000 travel agents and wholesale staff across the UK, Ireland and Scandinavia were updated on destination Jamaica in the reporting period. A travel agent roadshows in Scandinavia (Copenhagen and Stockholm) saw over 100 Swedish and Danish agents learning about the unique holidays available in Jamaica.



		During 2014/15 regular blitzes of both northern and southern counties ensured several hundreds of agents were reached and a special blitz was done in November to reinforce a sales push by Thomas Cook to protect the MAN-MBJ flight.
Trade Shows	8 events	<p>291,500 visitors</p> <p>The Meeting Show, London July</p> <p>The Northern Travel Ball, Manchester, September</p> <p>The Wedding Show, Blue Waters, Kent Oct/Jan</p> <p>World Travel Market - London, UK, Nov</p> <p>The Holiday Show- Dublin Jan</p> <p>MATKA – Finland Jan</p> <p>TUR- Gothenburg Sweden Mar</p>
Tour Operator Launches	2 events	<p>Thomson the UK's largest tour operator and retail travel agency chain, continued to work closely nationally with the JTB London during 2014-15. Jamaica was invited as a key destination partner to the regional launch of Thomson Tickets where Jamaica was the only long haul destination showcased. The opportunity ensured that across the twenty regional venues the team trained over 800 Thomson retail staff.</p> <p>In July and August Jamaica House 2014 was launched in collaboration with Barrhead Travel, Scotland's largest travel company. The campaign which featured on national TV, radio and Glasgow taxis promoted holidays to Jamaica throughout the summer of 2014. The House also provided a trade and consumer activation for Jamaica around the XX Commonwealth Games. Two invitation only events were held to support an open house and exhibition at the Jamaica House venue that ran throughout the games.</p>
Product Launches	2 launches	<p>The <b>Clipper Round the World Yacht Race 2013-14</b> concluded in the UK and the JTB team used the opportunity to showcase the Jamaican experience in Londonderry in Northern Ireland and in London at the race finale. This was the conclusion of a ten month long race across all oceans and six continents.</p> <p>The White Affair is the JTB travel agent top seller incentive and has been the main sales incentive for the North American travel agents. During the report period the incentive was launched in the UK through our then My Booking Rewards incentive</p>

		programme. The top five agents were taken to Jamaica in December to join the White Affair. The incentive recorded in excess of 20,000 room nights of bookings.
Sales Calls	730	With Blitzes across all the key UK cities and towns the team met with and updated over seven hundred retail travel agencies. Particular attention was paid to the Midlands and Northern region as we do not have a permanent presence in this area.

### **HIGHLIGHTS**

- Jamaica House Glasgow 2014, Coop sales and marketing campaign with Barrhead Travel Scotland's largest travel company around the XX Commonwealth Games.
- Clipper Round The World Yacht Race 2013-14 race finish promotional activities in Ireland and London.
- The White Affair travel agent incentive.

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

Despite a return to strong growth by our traditional markets such as Germany, Italy and The Netherlands, there was an overall decrease from this total market due mainly to the fact that two major charters were pulled at the beginning of the fiscal year, namely Russia and France, with these countries recording decreases of 60% over previous year on average.

While the loss of the Russian charter was compounded by the political situation and the effect of sanctions imposed in Russia, the French situation was compounded by the main tour operator not being able to sustain growth in the market due mainly to frequent closeouts in the key winter months.

Direct flights are not readily available from Continental Europe, except for Condor, Jetair and Arkefly, while same day west bound connections are difficult. American/US Airways through its one world connection has reach into every major Continental European city and, in spite of the poor connections existing, effectively landed over 10 % of the Continental European visitors. This situation will improve in 2015 with the re-introduction of the late afternoon American Airlines flight from Miami to Montego Bay in late summer 2015.

We welcomed a new direct charter service from Milan on the carrier Neos which began in winter 2014 and will be continuing into summer 2015.

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

Advertising was effected mainly through coop support with tour operator partners in tandem with current market trends, while consumer advertising was effected in France and Poland. Niche advertising utilised varied media targeting Sports, Music and Destination Weddings. We participated in more than 28 trade and consumer shows last year and will continue to do so in the coming year. We participated in two new trade shows in the new Eastern European markets of Serbia and Slovakia.

Our coop activities included Travel Agents Workshops with tour operator partners. Over 11 such workshops were done with our largest Tour Operator, TUI, across Germany, reaching over 1500 agents.

Our Promotions strategy utilised a careful choice of a mix of Trade and Consumer Shows and Events, relying heavily on effectiveness of such in putting JTB personnel and representatives in contact with key decision makers.

A Francophone roadshow was put on by the JTB in Fall to specifically drive business for winter. We covered the cities of Brussels, Paris, Lyon and Geneva and had support from hoteliers and airline partners.

Fam and press visits from both key and emerging markets were carried out. Some key press visits included TV2 of France and Kilimangaro of Italy who both did travel programs for their respective markets. Editorials and published articles resulted as a result of the detailed press visits which were targeted.

With the increasing trend towards digital use, our strategy was to use the digital medium where appropriate to efficiently increase awareness through various methodologies and medium such as webinars for training and updating travel agents, social media to engage more targeted consumers and promotional activity through partnerships. Digital engagement primarily focused on growing and creating facebook pages for key markets such as Spain and Italy and

also revitalizing the existing page for the German speaking market which grew from having 1,700 fans to well over 9,000 in 3months. The sites will continue to grow organically, as well as frequent promotions are planned with partners.

We participated in a virtual roadshow involving brand exposure and a 35 minute live product update to 1,100 travel agents in Russia and neighbouring CIS countries.

We will utilize this medium to increase collaboration with OTAs in the market as this booking trend continues to grow.

## **MARKETING REPRESENTATION**

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

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

## **PERFORMANCE IN THE MARKETPLACE**

### **UNITED STATES**

The U.S. economy grew by 2.4% in 2014 (that is, from the 2013 annual level to the 2014 annual level), compared with an increase of 1.9% in 2013.<sup>1</sup> Travel by 30.8 million US citizens during 2014 to overseas regions indicates that outbound travel from the USA increased by 6.1% over outbound travel during the corresponding period in 2013. Travel to the Caribbean region increased by 9.6% during this period also, reflecting a market share of 23.3% of the USA outbound travel market. Of the 68.3 million total outbound travelers for 2014, 37.5 million traveled to Canada and Mexico.<sup>2</sup>

With regard to Jamaica, during the winter season (Jan. – Apr.), stopover arrivals in 2014 were 1.4% lower than those in 2013 and 4.5% lower than in 2010. In comparison to 2013, stopover arrivals in the 2014 winter season from the Northeastern and Southern regions decreased by the same level of 2.9%. The Western and Midwestern regions of the U.S grew during this period by 2.8 and 1.2% respectively.

For the summer period (May – Dec.), the US market grew by 3.6% compared to 2013 and rose 8.9% over 2010 stopover arrivals. Summer arrivals in 2014 were 888,503. In 2011, 804,715 stopover arrivals came during summer and in 2010, 815,623 stopover arrivals visited. Stopover arrivals from all the US regions grew in 2014. The strongest growth was recorded in the Southern region, with 251,560 arrivals up 7.6%, followed by the Western region, with 105,404 arrivals, up 6.3%. The Northeastern region, where the most US arrivals originate from, with 388,189 arrivals recorded growth of 1.6%. The Midwestern region, with 143,350 arrivals, recorded the lowest increase of 0.7%.

The Northeastern and Southern regions contributed 70.3% of the US stopover visitors to Jamaica during 2014. This represents 1.9 percentage points less than its contribution in 2010. The Midwest region contributed 18.9% of the stopover arrivals and the remaining 10.9% of the stopover visitors came from the Western region. The Northeast market region with 571,301 arrivals was flat, with a 0.1% change, the South with 339,746 arrivals increased by 4.6%, the Midwest with 244,696 was flat, with a 0.9% change, and the Western region with 140,714

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

<sup>2</sup> U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries “U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico February, 2015”

increased by 5.4%. Overall, arrivals from the USA market increased 2.0% in 2014 with 1,296,457 over the 1,271,262 stopovers in 2013. This performance was 3.1% more arrivals than the 1,257,669 arrivals recorded in 2012 and 5.8% more than the 1, 225,565 in 2011.

### **USA Visitor Summary**

- The average length of stay for Foreign Nationals US visitors in 2014 was 7.5 nights, which is lower than the average of 8.7 nights for all visitors. (see page 39, Table 9a)
- In 2014 a total of 1,050,868 or 81.1% of US visitors came to Jamaica for leisure, recreation and holiday, 112,849 or 8.7% came to visit friends & relatives, 49,242 or 3.8% on business and 83,498 or 6.4% for other or unstated purposes. (see page 36, Table 8.1a)
- The annual average growth rate for visitors from the USA over the past five years from 2010 to 2014 was 1.1%. (see page 23 Fig. 4g)
- In 2014 the age distribution of US stopover visitors indicated that 10.8% were aged less than 18 years, 6.9% were between 18 and 24 years, 49.3% were between 25 and 49 years, 25.1% were between 50 and 64 years and 7.9% were over 64 years. (see page 34, Table 7)
- The Gender mix of visitors from USA, were 583,084 males (45.0%) and 713,373 females (55.0%). The gender ratio of visitors from the USA is 122 females per 100 males. (see page 35, Table 8)
- The peak periods of US stopover visitors to Jamaica in 2014 were: Summer (June – July), Easter (March) and Christmas (December). The months with the highest numbers of stopover arrivals in 2014, in descending order, were: July, June, December and March. (see pages 8, 9 and 17 Fig. 4f) Figure 4f shows that this pattern has been holding strong for the past three years (2012 – 2014).
- The most popular resort region to which US stopover visitors stayed in 2014 was Montego Bay with 41,883 or 34.1% of US visitors. 21.5% or 278,152 of the US visitors stayed in Ocho Rios and 19.9% or 258,629 stayed in Negril. (see page 37, Table 8.2a)

## **CANADA**

Canada's economic activity expanded 2014 with GDP at constant prices growing by 2.5% after increasing by 2.0% in 2013<sup>3</sup>. Outbound trips reached an estimated 33.487 million in 2014<sup>4</sup>. Arrivals from Canada in 2014 totaled 419,898 representing 20,567 more Canadian visitors to Jamaica than in 2013, a 5.2% decrease.

The Canadian market grew during the (January – April), winter period, increasing by 3.0%. During this period a total of 194,625 stopovers came from that market compared to 188,989 in winter 2013. This is still below the record number of 211,925 that came in winter 2012, which is 17,300 less visitors. With the exception of the month of March, all the months of winter recorded increases: January (6.5%), February (3.2%), March (-2.8%) and April (6.5%).

This trend continued into the summer period; aided by the improved availability of airlift to Jamaica from Canada with increased frequency and capacity from airlines Sunwing and Westjet. A 7.1% increase was recorded for the May – December summer period, with a total of 225,273 stopovers arrivals compared to the 210,342 arrivals in summer 2013. The following months recorded double digit percentage change in arrivals: July (17.5%), August (18.7%), and October (18.6%).

The main province of Ontario contributed 271,654 or 64.7% of stopover arrivals to the Canadian total, an increase of 6.4% over the 255,407 who came from that province in 2013. Quebec, the second leading visitor producing province, (with 13.4% of the visitors), produced 3.4% more stopovers. The other two leading provinces Alberta and British Columbia recorded mixed results. Alberta increased by 5.8%, while British Columbia recorded no change in 2014 compared to 2013.

### **Canada Visitor Summary**

- The average length of stay for Foreign National Canadian visitors in 2014 was 8.7 nights. (see page 39, Table 9a)
- In 2014 a total of 370,069 or 88.1% of Canadian visitors came to Jamaica for leisure, recreation and holiday, 26,388 or 6.3% came to visit friends & relatives, 8,676 or 2.1%

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

<sup>4</sup> Canadian Tourism Commission (December 2014). Tourism Snapshot: A focus on the markets that the CTC and its partners are active Vol, 9, Issue 12

came on business, and 14,752 or 3.5% came for other or unstated purposes. (see page 36, Table 8.1a)

- The annual average growth rate for visitors from the Canada region over the past five years from 2010 to 2014 was 6.6%. (see page 23, Fig. 4g)
- In 2014 the age distribution shows 12.3% were aged under 18 years, 6.4% were between 18 – 24 years, 47.0% were between 25 – 49 years, 26.3% were between 50 – 64 years and 7.9% were 65 and over. (see page 34, Table 7)
- The Gender mix of visitors from Canada, were 193,854 males (46.2%) and 226,044 females (53.8%). The gender ratio of visitors from Canada is 117 females per 100 males. (see page 35, Table 8)
- January through March and December are the peak months for visitor arrivals from Canada in 2014. This coincides with the cold winter climate experienced in Canada during this period (see pages 10, 11 and 26 Fig. 6)
- The most popular resort regions to which Canadian visitors stayed in 2014 was Ocho Rios with a total of 135,055 or 32.2% of Canadian visitors. 32.0% or 134,376 Canadian visitors stayed in Montego Bay and another 20.4% or 85,471 stayed in Negril. (see page 37, Table 8.2a)

## **UNITED KINGDOM/EUROPE**

The number of visits abroad by UK residents grew by 3.5% in 2014 from 56.5 million in 2013 to 58.5 million. This growth occurred in relation to visits to North America rose by 8.0%, Europe rose by 4.0, while visit to and Other Countries rose by 3.3%.<sup>5</sup>

Stopover arrivals to Jamaica out of the European region recorded positive growth in 2014. Arrivals from Europe increased by 10.7% in 2014, moving from 235,811 arrivals in 2013 to 261,081 arrivals in 2014. The United Kingdom, Germany, France and Italy are the most important visitor producing countries within this regional market, in descending order of importance.

### **United Kingdom Visitor Summary**

- The United Kingdom, with 177,216 stopover arrivals, registered an increase of 4.2% over the 151,315 recorded in 2013. This is still below the highest level of visitors from the UK

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<sup>5</sup> UK National Statistics – Travel Trends -2014, December 2014



in 2008 when 188,436 were recorded. The performance for winter was up by 9.5%, this trend continued in the summer with a further increase of 20.2%.

- The average length of stay for Foreign Nationals UK visitors in 2014 was 14.8 nights, which is higher than the average of 8.7 nights for all visitors. (see page 39, Table 9a)
- In 2014 a total of 123,570 or 69.7% of UK visitors visited Jamaica for leisure, recreation and holiday, 31,375 or 17.7% visited friends & relatives, 10,606 or 6.0% came on business, and 11,665 or 6.6% visited for other or unstated purposes. (see page 36, Table 8.1a)
- The annual average growth rate for visitors from the United Kingdom over the past five years from 2010 to 2014 was negative 1.0%. (see page 23)
- In 2014 the age distribution shows 12.5% were aged under 18 years, 6.9% were between 18 – 24 years, 44.3% were between 25 – 49 years, 27.1% were between 50 – 64 years and 9.1% were 65 and over. (see page 34, Table 7)
- The Gender mix of visitors from UK, were 80,374 males (45.4%) and 96,842 females (54.6%). The gender ratio of visitors from the United Kingdom is 120 females per 100 males. (see page 35, Table 8)
- July, August and December were the peak months for visitor arrivals from UK in 2014 with July being the highest month with 18,448 visitors. (see pages 10 and 11, Table 4)

## **CONTINENTAL EUROPE**

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 21,371 stopover arrivals in 2014, the German market increased by 8.6% over the 19,658 recorded in 2013. This is 50.3% below the peak of 43,018 German visitors recorded in 1998.

During 2014 France was the second main visitor producing country from Continental Europe; however this was below the 12,087 French arrivals recorded in 2013.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway and Sweden) represents 72.8 per cent of the total European market and contributed an additional 31,355 arrivals to the European total in 2014.

The performances of the following European countries albeit small numbers recorded mixed growth in 2014 compared to the corresponding period in 2013;

- Sweden 136.9%
- Italy 11.3%
- Czech Republic 5.4%
- Spain 1.2%
- Austria 5.8%
- The Netherlands 9.5%
- Belgium 4.8%
- Poland 13.1%
- Switzerland 3.1%

## **L ATIN 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 fell by 4.2% moving from 30,538 in 2013 to 29,263 in 2014.

Of the top three visitor-producing countries in the South American sub-region, Chile with 4,527 visitors decreased by 9.6%; Columbia with 4,111 increased by 13.4%; and Argentina with 4,037 visitors decreased by 12.7%.

From the Central American sub-region, Mexico with 3,117 increased by 12.6%; Panama with 2,494 increased by 16.8%; and Costa Rica with 1,184 declined by 60.8%

## **CARIBBEAN**

Arrivals from Caribbean territories to Jamaica increased for the first time since 2011. In 2014, Jamaica welcomed 59,057 arrivals from this market, which is 7,159 less arrivals than the 66,216 Caribbean nationals who visited Jamaica in 2011, but it is a 1.4% increase over the 58,249 who visited in 2013.

The Cayman Islands, with 15,623 stopovers, Trinidad and Tobago with 10,840, The Bahamas with 5,269 and Barbados with 4,321, continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 36,053 stopovers or 61.0% of the total Caribbean arrivals.

## **OTHER COUNTRIES**

China, Australia, Japan and India are the main visitor producing countries from other parts of the World. When compared to 2013, China with 2,645 grew by 9.3%, Australia, with 2,513 stopovers grew by 2.1%, Japan with 2,022 was down by 7.1% and India with 1,983 rose by 26.5%.

## **CRUISE PASSENGERS**

According to the Florida-Caribbean Cruise Association (FCCA), 21.7 million passengers cruised the seas in 2014, up 1.9% from the 21.3 million passengers in 2013, with 11.9 million originating from North America. In 2014 the growth of the cruise industry continued with fifteen new innovative and feature-rich ships that sailed 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.<sup>6</sup>

The Caribbean continues to lead as the number one cruise destination, accounting for 34.4% of all itineraries. The passenger numbers for the Caribbean continues to be consistent and high, despite other rising cruise destinations.

Jamaica recorded a double digit growth in cruise passengers during 2014. This total of 1,423,747 cruise passengers who visited our shores was a 12.5% increase over the 1,265,268 recorded for the corresponding period in 2013. It was also 6.5%, or 86,803 passengers ahead of the record year 2006, when 1,336,994 cruise passengers visited our shores. Seasonally, cruise arrivals recorded an increase of 3.6% in the winter period (January to April) with 588,691 cruise passengers, up from the 568,072 for 2013. During the summer period (May to December), with the exception of the month of September, which record a growth of 9.1%, every other month recorded a double digit increase in cruise passenger arrivals, ranging from as low as 10.3% in June to 46.9% in August. For this summer period 835,106 cruise passengers visited Jamaica and grew by 19.8% from 224 ship calls, compared to 697,196 passengers and 184 ship calls in 2013.

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<sup>6</sup> Source: Florida-Caribbean Cruise Association – Cruise Industry Overview 2014

The port of Falmouth contributed 772,265 cruise ship passengers or 54.2% of total passengers to Jamaica from 187 cruise ship calls.

The port of Ocho Rios, which in the past provided the largest share of Jamaica's cruise arrivals, accounted for 410,090 or 28.8% of the 1,423,797 who arrived at our shores in 2014. The port of Montego Bay accounted for 240,083 passengers or 16.9%.

The cruise ships carrying the most passengers to Jamaica in 2014 were all from the Royal Caribbean Cruise family of ships, the *Allure of the Seas*, *Oasis of the Seas* and *Freedom of the Seas*, all calling to the Port of Falmouth. The *Allure of the Seas* made 27 calls with 161,312 passengers. The *Oasis of the Seas* made 21 cruise ship calls with 127,528 cruise passengers and the *Freedom of the Seas* made 26 cruise ship calls and provided 106,806 passengers. The combined total of 395,646 cruise passengers from these three ships represents 27.8% of Jamaica's total cruise passenger market.

## **JAMAICA**

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

### **The Marketing Department**

The **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 one hundred and twelve (112) 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.

- 2014 April – June: 34 press releases
- 2014 July – September: 27 press releases

- 2014 October – December: 22 *press releases*
- 2015 January – March: 29 *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 sixty (60) press trips were managed through the marketing communications unit.

- 2014 April – June: 22 *press trips*
- 2014 July – September: 15 *press trips*
- 2014 October – December: 16 *press trips*
- 2015 January – March: 7 *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 (10) press trips.

- Calabash Media Trip
- Diaspora Conference Media Trip
- Jamaica Bridal Expo Media Trip
- Jamaica Jazz & Blues Festival Media Trip
- Jamaica Product Exchange (JAPEx) Media Trip
- MoBay City Run Media Trip
- Rebel Salute Media Trip
- Reggae Marathon Media Trip
- Reggae Sunfest Media Trip
- Tourism Outlook Seminar (TOS)

#### **Other projects:**

A total of seventeen (17) 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.

- 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.*

- Queens Baton Relay (2014 April 4 -6)  
*Focus on the Queens message for the Common Wealth Games.*
- Baltimore Ravens (Scout: 2014 April 23 – 25, Shoot: 2014 April 23 – 30)  
*48 pax out of US visited the island for a calendar shoot.*
- WBLS- US (2014 May 1 – 4)  
*Live broadcast & come along.*
- Clipper Yatch Race Jamaica Stopover (2014 May 16 – 24)  
*Special home-coming activity for the Jamaica Get Alright crew in Port Antonio, Jamaica. Several activities executed for the various teams to explore destination Jamaica.*
- The New York Jets (2014 June 1 – 5)  
*40 pax out of US visited the island for a calendar shoot.*
- Southwest Airlines Inaugural activities; including luncheon presentation (2014 July 1)
- Nation of Islam Press Conference (2014 September 10)
- Jamaica Bridal Expo (2014 September 20 – 21)
- Tourism Awareness Week (2014 September 21 – October 1)
- Jamaica Product Exchange (2014 September 21 – 23)
- Jamaica Civil Aviation Authority in collaboration with the International Civil Aviation Organization (October 7 – 9)  
*The Jamaica Tourist Board was invited to participate in the event as an exhibitor at the Montego Bay Convention Centre.*
- GoGo Vacations (October 25 – 29)  
*The Jamaica Tourist Board hosted a crew on island to capture footage for a 15 minute web series titled “Paradise Found”.*
- Travel Basecamp (October 25 – 29)  
*The Jamaica Tourist Board hosted a crew from Transat Holidays on island to capture footage for a web series which will feature 4 episodes on Jamaica lasting 4 – 7 minutes each.*
- Tourism Outlook Seminar (November 20-21)  
*The Tourism Outlook Seminar is an annual two-day forum for regional stakeholders to discuss the issues concerning the tourist industry.*

- Jumbo Touristik Fam Tour (2014 December 4 – 11)  
*The Jamaica Tourist Board hosted 14 Travel Agents + 1 Jumbo Touristik Representative out of Germany on island to gather information on the general tourism product.*
- Breakfast Television Live Broadcast (2014 December 12 – 15)  
*The Jamaica Tourist Board partnered with City TV out of Canada and Sunwing Travel Group for a live broadcast from Royalton White Sands.*

**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:

<b>Messages</b>	<b>TOTAL: 4</b>  <b>Breakdown:</b> April – June (7) July – September (7) October to December (2) January – March (2)
<b>Speeches</b>	<b>TOTAL: 14</b>  <b>Breakdown:</b> April – June (3) July – September (10) October to December (3) January – March (3)
<b>Editorial Content</b>	<ul style="list-style-type: none"> <li>- Bi-Weekly editorial content for Hospitality Jamaica publication.</li> <li>- Four supplements during the period 2014 April – June resulting from Anniversary of The Tourism Enhancement Fund, Institute of Internal Auditor's 20<sup>th</sup> Anniversary, Hospitality Jamaica 10<sup>th</sup> Anniversary and Experience Jamaica activities.</li> </ul>
<b>Fact Checking</b>	<ul style="list-style-type: none"> <li>- The unit assists with continuous fact checking in support of media trips and publications about destination Jamaica.</li> </ul>

**Marketing Collaterals:**

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

**WEBSITE / E-COMMERCE**

According to Futurebrand 2014, Jamaica ranks third after the USA and Canada in the regional brands for North America and the Caribbean with a 65% awareness. The USA is 85%. Placed at #51, Jamaica was the only Caribbean territory, outside of Puerto Rico to have made the list of 75 countries with what were believed to be strong brands.

In their analysis, Futurebrand acknowledges that countries can “usefully be understood as the sum of their identity and reputation. And, just like brands, strength or weakness of perception of a country can influence peoples’ decisions to choose them as places to visit, live or invest in”.

Given the competitive nature of the travel business Jamaica has a distinct advantage in the area of culture, particularly music and cuisine. The destination assets inclusive of great beaches, excellent adventure options also go a long way in making Jamaica desirable to the market.

The Website/E-Commerce unit has sought to use the unique experiences that are associated with Jamaica to encourage the varied audiences to keep the destination top-of-mind. The unit attempted to ensure that the audiences who are exposed to Jamaica through the website and social media channels received positive images and messaging. Whether they were visitors or potential visitors, the objective was to present Jamaica so that visits, and repeat visits are encouraged and enthused ambassadors for the destination are created. Through the website and social media channels the Unit can connect with online users to drive conversions and sales. The unit uses the varied platforms to make the destination’s brand visible.

The steady growth of the platforms over the past year, is largely organic. At the end of the 2014-2015 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](http://www.visitjamaica.com)



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

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

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

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

Twitter: deals and tips about Jamaica and activities happening now

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

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

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

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

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

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

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

The work of the Website/E-commerce unit must be infused into the overall marketing of the destination. As such greater synergies can be realized through multiple media.

The marketing efforts supported by the Unit included:

- Media opportunities: 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.
- Event Support: 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), Calabash Literary Festival, Jamaica Bridal Expo, Reggae Sumfest, Jamaica Pro-Am “Annie’s Revenge” Golf Tournament, and Reggae

Marathon. Soul in the Sun – a new music festival was held in the fall was also supported by the team.

- Competitions, trivia and give-aways were used to heighten awareness of events and significant activities in the markets.
- 2014 Winter Olympics in Sochi. The unit worked in the partnership for activations for Sochi. Among the initiatives supported to this end was a Twitter Chat with members of the Bobsled Team. The PR agency created an animated feature with the Bobsled Song which saw phenomenal numbers of views and requests for posting from international clients.

Special Promotional activities included the second year of photoshoot for the Baltimore Ravens Cheerleaders in April 2014 and the New York Jets.

The updates to the website [www.visitjamaica.com](http://www.visitjamaica.com) continued. The team continues its outreach to stakeholders for fresh and current content.

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. Monitoring concerns and integrating analytics into the work of the unit continues to be a growing part of the work of the unit.

## **TOURISM AWARENESS**

The Tourism Awareness Unit continued to have valuable opportunities to share the tourism awareness message. The unit received numerous invitations to meeting of all sorts, with varying audiences, to talk about various tourism related topics or to set up exhibitions.

Increasingly the unit has been asked especially to share on career opportunities in the industry as Jamaicans continue to see tourism as one of the fastest growing industries in Jamaica with great employment prospects. Tertiary institutions offering hospitality and tourism management in particular sought to garner increased input from the unit in their curriculum development and in the coaching and mentoring of students entering the workforce. The unit assisted with the coordination of internship experiences for hospitality and tourism students, participated in job fairs at the tertiary level as well as assisted students doing research on the JTB. In

recognition of the value of parents in career decision making, the unit also sought to engage them through our activities.

Students at all levels participated in numerous tourism awareness competitions of which the highlight was placing 2<sup>nd</sup> – senior division in the finals of the FCCA Poster competition and 1st – junior division in the FCCA Essay Contest. Tourism Action Club members travelled to participate in the CTO Youth Congress held in the US Virgin Islands and the GTTP Research and Awards Competition held in France. For the first time also, the TAC partnered with the Jamaica Environment Trust to support its “Nuh Dutty Up Jamaica” campaign sponsored by TEF. Specifically, students participated in a clean coast research and presentation which looked at gullies and where the waste goes. They also joined the many volunteers to clean up the beaches across the island on International Coastal Clean-up Day. The Tourism Action Clubs in general continued on its growth path supported by good PR of the club’s activities. Of interest is the strong growth of clubs in very rural places in Jamaica where students otherwise do not have strong exposure to the tourism product. The unit is always delighted to change the lives of these students via exposure through the Club. Strong emphasis was also placed on using social media to communicate tourism awareness messages.

The Tourism Awareness Unit also participated in special projects including Tourism Outlook Seminar, Community Tourism Planning and Implementation, World Tourism Day and Tourism Awareness Week activities.

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

The JTB Library, reputed in 1963 as “the finest in the Caribbean”, continues to be one of the leading special libraries in region. It continues to serve the information needs of the Board, its partners and wider global tourism interest. On September 25, 2014, the Library was renamed in honour of the late Clive Eugene Taffe who served the organization for some fifty years. The unit is now called the Clive E. Taffe Information and Resources Centre. Clients are primarily served electronically through the Tourism Information Publishing Site (TIPS) [www.jtbonline.org](http://www.jtbonline.org) portal, via electronic mail, and physical visit to the facility.

The Information and Resources Centre focusses on five primary areas of activities: *Acquisition and access* which involves the acquisition of current tourism material and in particular those relating to the Caribbean tourism trade, and providing access to them in a timely manner; *Recover and conversion* - researching materials necessary for the achievement of the organization goals and ensuring that they are prepared in formats which facilitate efficient

access; *Research and Exhibition* - liaising with other information partners to close information gaps within collections and mounting exhibitions to showcase the impact on and importance of tourism to the country; *Image Management* - the capture and management of collections of images to support the Board's activities; and *Records Management* - assisting the Administration Department in developing systems to manage the Board's records in accordance with the requirements of the Access to Information Act of 2002.

Over the twelve month period under review:

- 110 tourism information requests were received and satisfied
- 98 researchers were assisted in the Kingston facility
- 1,330 pieces of current awareness were sent to staff
- 2,296 images were distributed to agencies, partners and publishers for the promotion of the destination
- Exhibition was mounted to showcase the contribution of Clive Taffe to the tourist industry and to Jamaica
- Research was conducted in preparation of mounting an exhibition to mark the 60<sup>th</sup> Anniversary of the Jamaica Tourist Board to be launched in April of 2015
- 759 VHS tapes converted representing over 10,000 hours of information
- 194 Audio cassettes converted, to be transferred to appropriate audio formats
- Provided support to the Website Ecommerce, Tourism Awareness and Marketing Communication Unit in area of copyright guidance and image capture.
- Provide support to the Human Resources and Administration departments in the area of records management. The Administration Department was identified as the pilot department for records management and access services for the Board and activities commence to sensitize the organization about the importance and impact of proper management of information. The first phase of a classification system was developed and primary auditing of the Administration Department's records was conducted.

The information and Resources Centre continues to provide access to millions of sources of information via current databases maintained including

- 2,302 publication held in the Jamaica physical collections
- 642 electronic documents hosted in the Jamaica Digital electronic collection
- 88 electronic books hosted on the E-brary site
- The collections over 70 special libraries through the Social And Economic Information Network database
- More than 1.1 million records, with coverage dating back to 1931, with full text for over 525 publications, including periodicals, company & country reports, and books through Ebsco's Hospitality and Tourism Complete database

- the UNWTO Elibrary- Thousands of sources offering unparalleled coverage of research and information in the area of tourism
- Over 10,000 images between the restricted and unrestricted collections
- 1,000 item CD collections representing activities of interest to the Board

## **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 attractions sub-sector in collaboration with JAMPRO.

### **CRUISE SHIPPING:**

The JTB has been designated the responsibility for marketing Jamaica as a cruise destination. However, the modality of this and funding is still to be worked out with Port Authority of Jamaica. Inter-agency 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 marketing activities.

### **EVENTS:**

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

#### **■ CULTURE AND ARTS:**

- Bacchanal Jamaica Road March, April 27, Kingston
- DRP Writers Retreat, May 23-25, St. Ann
- Calabash 2014, May 30 – June 1, Treasure Beach, St. Elizabeth

- Liguanea Art Festival, June 1, Kingston
- Jamaica International Ocho Rios Jazz Festival, June 8-15, Kingston & Ocho Rios, St. Ann
- L'ACADCO Visit to Japan, June 20-29, Kingston to Japan
- International Reggae Day, July 1, Kingston
- Reggae Sumfest, July 13-20, Montego Bay, St. James
- Soul in the Sun, Oct. 10-12, Montego Bay, St. James
- Merritone Homecoming & Family Reunion, October 15-20, Kingston & Montego Bay, St. James
- Rebel Salute, January 16-17, Richmond Estate, St. Ann
- Youth Day, Jan. 24, Montego Bay
- Reggae Month, Feb. 2015, All Island
- Bob Marley Birthday Bash, February 1-6, Negril, Westmoreland
- Bacchannal / Jamaica Carnival in Jamaica, March 7-April 2015, Kingston
- Earth Hour Concert, March 28, Kingston

#### ■ SPORTS:

- JHTA Swing for Charity, April 27, Montego Bay
- British Amateur Rugby League Association, June 1-15, Kingston & St. Catherine
- Real Caribe Football Club, June 20-30, Clarendon
- International Cricket West Indies vs. New Zealand, June 8 – 12, Kingston
- Caribbean Premier League (CPL) T20 Tournament, July 31, Aug 2 – 3, Kingston
- ITF World Cup, Aug 26 – 30, Montego Bay
- FIH World Hockey League, Sept. 30-Oct. 6, Kingston
- 6<sup>th</sup> Annual Jamaica International Synchronized Swimming Championships, Oct. 9-11, Kingston

#### ■ ADVENTURE SPORTS:

- St. Ann Kite Festival, April 21, Seville Heritage Park, St. Ann
- Makka Pro Surf Contest, July 18-20, Yallahs, St. Thomas
- Pagee Fisherman Regatta, August 13, Port Maria, St. Mary
- 51<sup>st</sup> Port Antonio International Marlin Tournament, Sept. 27 - Oct. 4, Port Antonio, Portland
- Pineapple Cup Race, Feb. 5-13, Miami Florida USA to Montego Bay Jamaica
- Bob Marley's 70<sup>th</sup> Birthday Celebrations, Feb. 6-7, Kingston
- Jamaica Fat Tyre, Feb. 16-22, St. Mary, St. Thomas, Portland

#### ■ ENDURANCE, HEALTH & WELLNESS:

- Mobay City Run, May 18, Montego Bay, St. James
- RuJohn Foundation – Celebrity Sports Camp, June 22-27, Kingston

- Digicel 5k/ Night Run, October 11, Kingston
- Reggae Marathon & Half Marathon, December 4-6, Negril, Westmoreland
- Kingston City Run, March 13-15, Kingston

■ CULINARY:

- Westmoreland Curry Festival, April 27, Savanna La Mar, Westmoreland
- All Jamaica Grill Off, June 29, Kingston
- CB Pan Chicken Series, July 5, August 23, September 27, & November 24, Mandeville, Portmore, Montego Bay, Kingston
- Little Ochie Seafood Festival, July 11-13, Alligator Pond, St. Elizabeth
- Milk River Seafood & Jerk Festival, July 26, Milk River, Clarendon
- Montego Bay Jerk Festival, August 1, Montego Bay, St. James
- Port Morant Banana Festival, Oct. 21, Port Maria, St. Mary
- Jamaica Epicurean Escape, May 21 - 29, Richmond Estate, St. Ann
- Rainforest Seafood Festival, Feb. 18, Montego Bay, St. James

■ FAITH BASED:

- Praisefest, May 20 - 21, Montego Bay, St. James

■ HERITAGE:

- Blue Mountain Music Festival, February 21-22, Kingston
- 6<sup>th</sup> Charles Town Maroon Festival, June 20-23, Charles Town, Portland
- Ananse Sound Splash, Nov. 19 – 23, Kingston & Port Antonio

■ FASHION/ BEAUTY/ LIFESTYLE

- The Fashion Face of the Caribbean Model Competition, April 14-15, Kingston
- Ms Global International Pageant, Sept. 2014, Montego Bay
- Fashion Showcase Weekend, Oct. 23 – 25, Montego Bay
- The Collection MODA, Nov. 20-23, Kingston

■ CONFERENCE/ CONVENTION/ EXPO:

- The Business of Sport, May 1–2, Kingston
- TDC Cruise Academy, May 13, Falmouth, Trelawny
- Jamaica Bridal Expo, Sept. 19-21, Montego Bay, St. James
- Jamaica Product Exchange (JAPEX), September 21-23, Montego Bay, St. James
- Florida Caribbean Cruise Association (FCCA), Oct. 9-10, Miami, Florida USA
- Nexxus Caribbean Summit, Feb. 5-7, Montego Bay St. James
- International Reggae Conference, Feb. 11-14, Kingston
- Cruise Shipping Miami Conference, Mar. 16-19, Miami Florida USA

- EMANCIPENDENCE & DIASPORA HOMECOMING REUNIONS:
  - Smirnoff Dream Weekend, August 1-6, Negril, Westmoreland
  - SPF Weekend, August 1-4, Ocho Rios, St. Ann
- CONTINGENCY/ SPECIAL PROJECTS:
  - None occurred during the year

## JAMAICA SPORT

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

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

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



#### JAMAICA SPORT EVENTS SPONSORED:

- CONCACAF Under 20 Men's Football Tournament, Jan. 9 – 24, Kingston & Montego Bay
- Negril Open Beach Volleyball Classics, Jan. 10, Negril
- JNA Sunshine Series, Jamaica vs. England, Jan. 10-13, Kingston
- Jamaica Winter Open Table Tennis Tournament, Feb. 28 – Mar. 1, Montego Bay
- Jamaica International Badminton, March 19-23, Kingston
- Venus Volleyball, March 20-22, GC Foster College, St. Catherine

### **REGIONAL OFFICE**

The JTB's Regional Office 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, local schools' career day activities, etc.)
- Visitor Relations
- Information and facilitation services at the island'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 259 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, Barcelona, Mexico, Netherlands, Sweden, Belgium, Guadeloupe, Korea, St. Maarten, Italy, Spain, Poland and Holland.

The Meet-the-People programme is promoted on the Board's website, in the regional offices, the hotels and at special promotional events.

It remains one of the most outstanding and vibrant programmes developed by the Board. The Meet-the-People programme has impressed other destinations, some of which have developed similar concepts in their tourism programme.

**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 - 705
  - Travel Specialists - 598
  - Others: - 4,678
  - Groups/Weddings, Honeymoon/Conventions, Meeting Planners
  - Hotel Reservations - 71 reservations for 122 visitors

#### **2014/2015 Travel Agent/Tour Operator Arrivals**

- |                               |                |
|-------------------------------|----------------|
| • United States – 539         | Canada – 180   |
| • United Kingdom& Europe – 70 | Caribbean – 15 |

Travel agents and tour operators were guests of the Jamaica Tourist Board. These tours served mainly to update the travel agents and tour operators on the attractions and hotel product facilities.

## **Visitors' Assistance at the Offices/Airport**

The region assisted 185 visitors and 200 students at the office in Montego Bay.

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

## **Major Events in the Region**

- JAPEx 2014
- CHTA Marketplace 2015
- Experience Jamaica 2014
- Reggae Month – February 2015
- Opening of Hyatt Resorts
- Reggae Sunfest
- Jamaica Diaspora Conference
- Jamaica Jazz & Blues Festival
- New Flights: Addition of Jet Blue flight from Fort Lauderdale to Montego Bay; Southwest Airlines inaugural flight in July 2014

## **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 2014:

- World's Leading Wedding Destination
- World's Leading Cruise Destination
- World's Leading Heritage Project: Port of Falmouth
- Caribbean's Leading Tourist Board
- Caribbean's Leading Destination
- Caribbean's Leading Cruise Destination
- Caribbean's Leading Airport: Sangster International Airport
- Caribbean's Leading Heritage Attraction: Port of Falmouth
- Caribbean's Leading Cruise Port: Ocho Rios
- Caribbean's Leading Meetings & Conference Centre: Montego Bay Convention Centre
- Caribbean's Leading Airport Lounge: Club MoBay

**Jamaica Tourist Board Awards:**

- Agents' Choice Award 2014 for Favourite Tourist Board in Canada
- Hospitality Sales and Marketing Association International with a Gold Adrian Award for Public Relations Excellence

**Destination Awards:**

- Agents' Choice Awards 2014 for Favourite Honeymoon Destination
- Excellencias Award in Spain for work done in the emerging markets, especially in Russia and Europe

**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 2014/15, licences were approved for 4,324 entities as set out hereunder:

ENTITIES	RENEWAL	NEW	TOTAL
ATTRACTION	19	3	22
BIKE	4	2	6
CAR RENTAL	40	1	41
CONTRACT CARRIAGE	2,902	149	3,051
DOMESTIC TOUR	68	21	89
WATERSPORTS	84	16	100
HOTELS	5	2	7
NON HOTEL	0	9	9
TRAVEL HALT	0	2	2
PLACE OF INTEREST	0	0	0
CRAFT	903	94	997
TOTAL	4,025	299	4,324

## **STATISTICS**

### **INTERNATIONAL**

The year 2014 was the fifth consecutive year of positive growth in international travel. The World Tourism Organization (UNWTO) reported that International tourist arrivals grew by 4.7% in 2014, reaching a 1,138 million.<sup>7</sup> Tourism has proven to be strong and resilient against adversities faced by many destinations.

All world regions recorded growth in international tourist arrivals for 2014. The strongest growths were registered in the Americas and Asia and the Pacific with 7.4% and 5.4% respectively. At slightly lower rates of growth were the Middle East with 4.4%, Europe with 3.9% and Africa with 2.3%. Europe, the most visited region with over half the world's international tourist, saw an increase of 22 million arrivals in 2014, reaching a total of 588 million. The second most visited region in the world, Asia and the Pacific increased by 13 million more arrivals to a total of 263 million. The Americas to which Jamaica is a part, was the best performing region with a growth of 7.4%, welcoming an additional 13 million international tourist and raising the total to 181 million. Growth was driven by North America posting a growth of 8.2%, with 119.5 million arrivals.

### **CARIBBEAN**

The Caribbean Tourism Organization (CTO) reported that in 2014 there was a strong demand for travel to the region and a record 26.3 million visitors came to 'enjoy the un-equalled and diverse experiences' the Caribbean had to offer. This was 1.3 million more tourist arrivals, a 5.3% increase over in 2013<sup>8</sup>

The Caribbean region demonstrated that it's diversity of cultures to its authentic natural experiences, offered numerous enjoyable, refreshing and relaxing encounters. This is an indication that stability has returned to the main tourist generating markets and consumer confidence is growing. United States remained the most important supplier of tourists to the region with a growth of a 5.5% increase in arrivals. Approximately 13 million Americans visited the region with most arriving in Dominican Republic, Jamaica, Puerto Rico and Bahamas. Canadian arrivals showed increased growth in arrivals of 5.7%, arrivals from Europe increased by 4.6% and Intra-regional travel as a whole grew by 4.8%.

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<sup>7</sup> UNWTO World Tourism Barometer – Volume 13 January 2015.

<sup>8</sup> Caribbean Tourism Review 2014, State of the Industry report February, 2015.

The top three most visited islands in the region were: Dominica Republic, Cuba, and Jamaica, in descending order of importance. Overall the CARICOM countries recorded a 3.2% growth for 2014; the Dutch Caribbean, aided by the performances of Aruba (9.5%) and St. Maarten (7.3%), had the highest growth rate much more than the regional growth, recording a 6.8% increase over 2013. The performance of the Spanish speaking Caribbean upheld its dominance in total arrivals, with a positive growth in arrivals of 6.4% increase over 2013.

The Caribbean Cruise sector is estimated to have increased by 8% in passenger arrivals during 2014 to approximately 23.9 million. Twenty-one of the 24 destinations recorded increased cruise activity in 2014 over 2013. The Bahamas Islands, Cozumel, US Virgin Islands, Cayman Islands and St. Maarten are the top five most popular Caribbean Cruise ship destinations within the region, which is approximately 56% of the market and over 12.7 million passengers.

### **VISITOR ARRIVALS TO JAMAICA**

- Total stopover arrivals of 2,080,181 increased by 3.6%
  - Foreign Nationals of 1,929,454 increased by 3.7%
  - Non-resident Jamaicans of 150,727 increased by 2.2%
- Cruise passenger arrivals of 1,423,797 increased by 12.5%

### **STOPOVERS**

Total stopover arrivals in 2014 surpassed the 2 millionth marker to reach a record of 2,080,181, which was 3.6% above the 2,008,409 arrivals recorded in 2013. This figure represents 71,772 more stopovers than in 2013. In the first quarter of 2014, Jamaica recorded a 0.2% negative growth in stopover arrivals over the 2013 figures. During the second quarter this growth rose to 3.1%. In the third quarter this growth was 5.0%. In the last and final quarter of 2014, this strong growth continued and ended with a growth of 7.0%. This growth was led by the increase of 9.8% in arrivals during the month of October.

With the exception of the 1<sup>st</sup> quarter, tourist arrivals in 2014 outperformed those in 2011, with growth rates of -2.5%, 8.6%, 9.5% and 12.6%, 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 2014 were as follows:

- Maintaining high visibility in the traditional market places of North America, Latin America and Europe through an integrated promotional and communications programme.
- The “tweaking” of the advertising campaign “Home of All Right” and the continued upgrade/redesign of the visitjamaica website.
- Jamaica’s continued use of its online presence for its marketing efforts by building a community around destination Jamaica across targeted groups, with the objective to make Jamaica the most remarkable, memorable and visible to more people in the online arena.
- Representation at major trade events in emerging markets such as Brazil, other Latin American Markets, Continental Europe, China and India.
- Increased airlift and Visa facilitation for nationals were strategies used to develop and increase market share from these emerging markets.
- A number of hotels that changed ownership and management in 2013 re-opened, resulting in the availability of more rooms in 2014.
- On-island Travel Agents’ Familiarization tours.

Destination Jamaica continues to offer a diverse product of very high quality to its visitors, through its expansive and inclusive nature in 2014. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations, unequalled visitor experiences and provide value for money.

### **Average Length of Stay**

In 2014 the overall average intended length of stay for foreign nationals was 8.7 nights; this was the same level of nights recorded in 2013. This is two less nights spent in Jamaica than those visitors who stayed in Jamaica during the early 1990’s, when the intended length of stay was over eleven nights. Those foreigners who used hotel accommodation had an average length of stay of 6.9 nights and those who stayed in non-hotel accommodation stayed 13.8 nights.

American visitors, on the average, stayed 7.5 nights while Canadians stayed an average of 8.7 nights. Visitors from the United Kingdom recorded an average length of stay of 14.8 nights and those visitors from Continental Europe stayed 11.4 nights.

### **Purpose of Visit**

Of the 2,080,181 stopover arrivals who visited the island during 2014, a total of 1,668,217 or 80.2% were visiting for the purpose of leisure, recreation and holiday; 8.8% were visiting Friends and Relatives, 4.7% were on business, and the remaining 6.4% were on other or unstated purposes. (See page 36, Table 8.1)

### **Hotel Room Occupancy**

The average room capacity rose by 2.8% in 2014, moving from 17,872 rooms in 2013 to 18,379 rooms in 2014. Total room nights sold of 4,570,686 in 2014 was up 3.1% above the 4,431,205 room nights sold in 2013. Hotel room occupancy grew by 0.2 percentage points to 68.1%, compared to the 67.9% level in 2013. The number of stopovers that intended to stay in hotel accommodations increased from 1,398,909 in 2013 to 1,435,372, an increase of approximately 2.6% in 2014.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 72.3%, which was up by 2.0% from the 70.9% recorded in 2013. The total number of room nights sold increased by 10.3% moving from 1,528,893 in 2013 to 1,686,627 in 2014. The average room capacity increased by 8.1% in 2014, moving from 5,909 rooms in 2013 to 6,388 rooms in 2014. The number of stopovers that intended to stay in hotel accommodations increased from 529,814 in 2013 to 569,653, an increase of 7.5% in 2014.

The average hotel room occupancy rate for Ocho Rios was 71.5%, which was 0.7 percentage points higher than the 70.9% recorded in 2013. The total number of hotel room nights sold moved from 1,356,440 in 2013 to 1,333,352 in 2014 a decrease of 1.7%. The number of stopovers that intended to stay in hotel accommodations recorded a moderate increase, moving from 404,730 in 2013 to 405,164, an increase of 0.1% in 2014.

The resort area of Negril recorded an average hotel room occupancy rate of 63.5% in comparison to the rate of 64.5% in 2013. The number of hotel room nights sold in this resort area increased by 1.8%, recording 1,182,882 room nights sold compared 1,162,069 sold in 2013. The average room capacity increased by 3.4% in 2014, moving from 4,933 rooms in 2013 to 5,103 rooms in 2014. The number of stopovers that intended to stay in hotel accommodations declined from 361,647 in 2013 to 356,731, a decrease of 1.4% in 2014.



In the Mandeville/Southcoast resort area, average hotel room occupancy rate decreased by 5.3 percentage points, moving from 65.3% in 2013 to 60.0% in 2014. Room nights sold decreased from 133,002 in 2013 to 119,316 being sold in 2014.

Kingston & St. Andrew achieved a hotel room occupancy level of 57.1%, which was 0.7 percentage points lower than the 57.8% recorded in 2013. The number of room nights sold in Kingston & St. Andrew declined by 1.5%, moving from 248,922 in 2013 to 245,290 in 2014.

Hotel room occupancy for the resort area of Port Antonio was 16.3%, which was 4.6 percentage points above the level of 9.7% recorded in 2013. The number of room nights sold in Port Antonio increased from 1,879 in 2013 to 3,210 in 2014.

Overall, the all-inclusive hotel room occupancy rate was at the same level of 74.7%, as recorded in 2013. Non all-inclusive room occupancy rate moved from 39.5% in 2013 to 44.2% in 2014.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 35.9%. Hotels with 51 – 100 rooms, achieved a rate of 40.0%. The number of stopovers that intended to stay in hotels with less than 100 rooms increased from 123,270 in 2013 to 127,453, an increase of 3.4% in 2014. Hotels in the size range of 101 – 200 rooms recorded an occupancy rate of 68.7%, and hotels with over 200 rooms achieved a room occupancy rate of 76.9%. The number of stopovers that intended to stay in hotels with more than 100 rooms increased from 1,275,639 in 2013 to 1,307,920, an increase of 2.5% in 2014.

### **Visitor Expenditure**

Gross visitor expenditure in 2014 was estimated at approximately US\$2.248 billion. This represents an increase of 6.4% against the estimated US\$2.113 billion earned in 2013.

Total expenditure of Foreign Nationals amounted to US\$2,053 billion. Cruise passenger expenditure totaled US\$0.118 billion while US\$0.077 billion was estimated as the contribution of Non-Resident Jamaicans.

Foreign Nationals spent on the average US\$122 per person per night while cruise passengers spent an average of US\$82 per person per night.

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

The number of persons employed directly in the accommodation sub-sector remained flat moving from 35,197 in 2013 to 35,166 in 2014, a decrease of 0.1%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 30,993 persons or 88.1% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 12,777 direct jobs represented 36.3% of those employed, Negril with 9,810 direct jobs, accounted for 27.9%, and Ocho Rios with 8,406, was responsible for 23.9%. 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 2014 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**

- After major refurbishing and adding over 190 new rooms, the two resort property previously the Ritz Carlton, the Hyatt Ziva adult only and Hyatt Zilara Family Resort has re-opened with a combined total of 623 rooms.
- The 700 room Jamaica Grande changed ownership and is undergoing refurbishing to be branded as a Moon Palace resort and is slated to re-open in early 2015.
- The Courtyard Marriott began construction of a 130 room property in Kingston and is expected to be completed by the end of 2015.

# APPENDIX I

See Tables taken from the  
Jamaica Tourist Board's Annual Travel Statistics for 2014  
on the following pages

## SUMMARY OF MAIN INDICATORS

	2013	2014	%Change 2014/2013
<b>TOTAL STOPOVERS</b>	<b><u>2,008,409</u></b>	<b><u>2,080,181</u></b>	<b><u>3.6</u></b>
Foreign Nationals	1,860,935	1,929,454	3.7
Non-Resident Jamaicans	147,474	150,727	2.2
<b><u>MARKET REGION</u></b>	<b><u>2,008,409</u></b>	<b><u>2,080,181</u></b>	<b><u>3.6</u></b>
From U.S.A.	1,271,262	1,296,457	2.0
Canada	399,331	419,898	5.2
Europe	235,811	261,081	10.7
Caribbean	58,249	59,057	1.4
Latin America	30,538	29,263	-4.2
Asia & Pacific	7,505	8,194	9.2
Other Countries	5,713	6,231	9.1
<b><u>CRUISE SHIP PASSENGERS</u></b>	<b><u>1,265,268</u></b>	<b><u>1,423,797</u></b>	<b><u>12.5</u></b>
<b><u>TOURIST ACCOMMODATION</u></b>	<b><u>26,839</u></b>	<b><u>26,888</u></b>	<b><u>0.2</u></b>
<b>Hotel Rooms *</b>	<b>20,359</b>	<b>20,310</b>	<b>-0.2</b>
All-Inclusive	15,274	15,418	0.9
Non All-Inclusive	5,085	4,892	-3.8
<b>Other Rooms</b>	<b>6,480</b>	<b>6,578</b>	<b>1.5</b>
Guesthouses	3,087	3,162	2.4
Resort Villas & Cottages	2,772	2,805	1.2
Apartments	621	611	-1.6
Hotel Room Nights Sold	4,431,205	4,570,686	3.1
Average Hotel Room Nights Available	6,523,280	6,708,335	2.8
Average Hotel Room Occupancy	<u>67.9</u>	<u>68.1</u>	<u>0.3</u>
All-Inclusive Hotels	74.7	74.7	0.0
Non All-Inclusive	39.5	44.2	11.9
<b><u>AVERAGE LENGTH OF STAY</u></b>			
Foreign Nationals	8.7	8.7	0.0
Non-Resident Jamaicans	16.8	16.5	-1.8
<b><u>VISITOR EXPENDITURE (US\$ MILLION)</u></b>	<b><u>2,113</u></b>	<b><u>2,248</u></b>	<b><u>6.4</u></b>
Stopovers	2,011	2,130	5.9
Cruise Passengers	102	118	16.3
<b><u>EMPLOYMENT IN ACCOMMODATION SECTOR</u></b>	<b><u>35,197</u></b>	<b><u>35,166</u></b>	<b><u>-0.1</u></b>

\* Excluding Closed Rooms

**TABLE 1**  
**VISITOR ARRIVALS TO JAMAICA**  
**2000 - 2014**

	STOPOVERS	CRUISE PASSENGERS <sup>1</sup>
2000	1,322,690	909,075
2001	1,276,516	841,412
2002	1,266,366	866,226
2003	1,350,285	1,133,411
2004	1,414,786	1,102,510
2005	1,478,663	1,137,250
2006	1,678,905	1,337,993
2007	1,700,785	1,180,733
2008	1,767,271	1,093,273
2009	1,831,097	923,234
2010	1,921,678	909,899
2011	1,951,752	1,126,646
2012	1,986,085	1,320,547
2013	2,008,409	1,265,693
2014	2,080,181	1,423,797

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

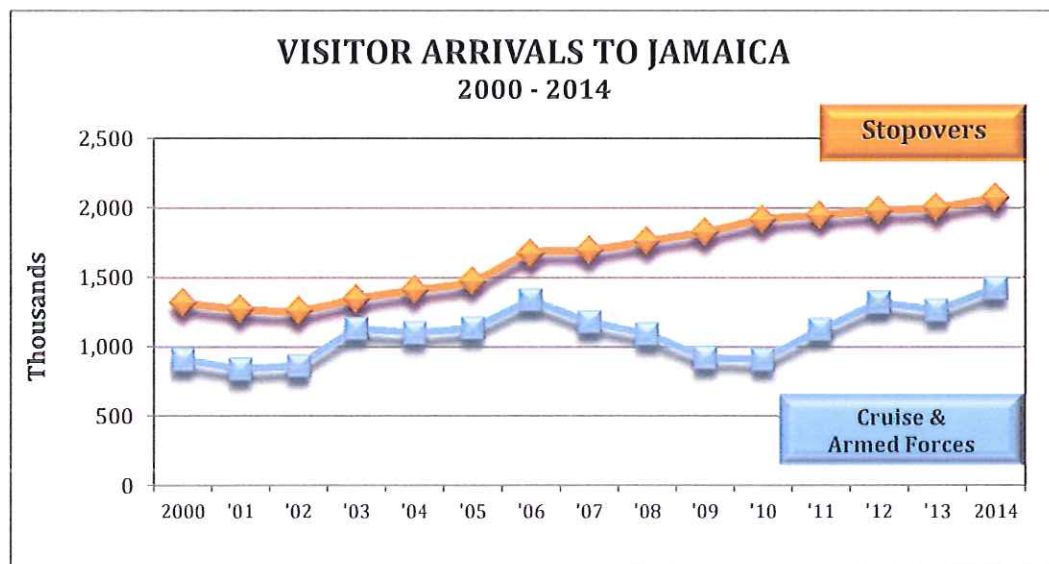


Fig. 1

**TABLE 2****TOTAL STOPOVER ARRIVALS BY MONTH: 2010 - 2014**

	2010	2011	2012	2013	2014
January	161,094	174,144	169,355	161,455	169,280
February	167,462	175,114	180,595	166,010	169,328
March	201,378	204,046	204,724	213,109	200,732
April	166,955	179,444	180,511	171,630	181,664
Jan.-Apr.	696,889	732,748	735,185	712,204	721,004
May	149,775	146,583	157,233	160,785	166,249
June	164,205	166,545	179,814	186,481	187,083
July	204,526	202,493	209,824	205,655	221,006
August	159,408	155,133	157,863	164,336	171,486
September	97,010	98,280	104,360	105,426	106,757
October	114,699	112,536	111,253	123,663	135,730
November	134,320	139,721	138,395	148,512	157,737
December	200,846	197,713	192,158	201,347	213,129
May - Dec.	1,224,789	1,219,004	1,250,900	1,296,205	1,359,177
Jan. - Dec.	1,921,678	1,951,752	1,986,085	2,008,409	2,080,181
% Inc./Dec.	4.9	1.6	1.8	1.1	3.6

**Fig. 2**



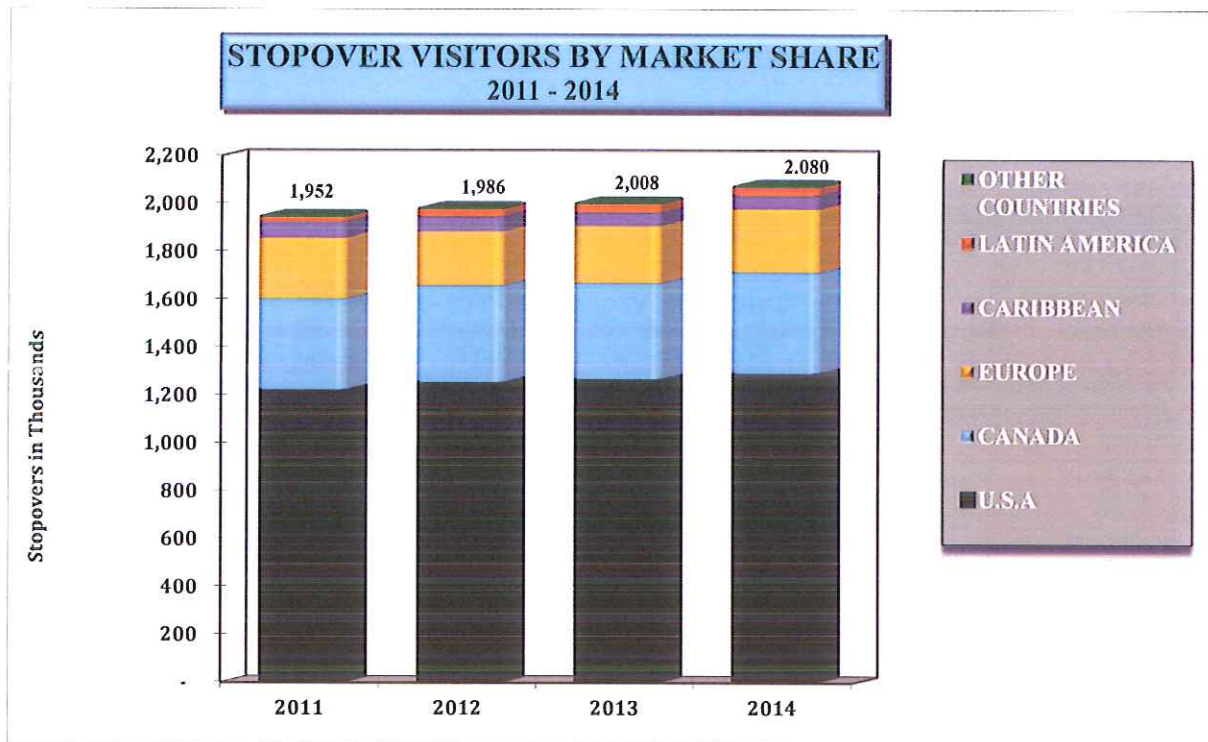


Fig. 4

Countries	Stopovers in Thousands								%Change 2014/13
	2011	%Share	2012	%Share	2013	%Share	2014	%Share	
U.S.A.	1,225.6	62.8	1,257.7	63.3	1,271.3	63.3	1,296.5	62.3	2.0
Canada	378.9	19.4	403.2	20.3	399.3	19.9	419.9	20.2	5.2
Europe	253.0	13.0	222.4	11.2	235.8	11.7	261.1	12.6	10.7
Caribbean	66.2	3.4	65.0	3.3	58.2	2.9	59.1	2.8	1.4
Latin America	16.6	0.8	25.0	1.3	30.5	1.5	29.3	1.4	-4.2
Other Countries	11.4	0.6	12.8	0.6	13.2	0.7	14.4	0.7	9.1
Total	1,951.8	100.0	1,986.1	100.0	2,008.4	100.0	2,080.2	100.0	3.6

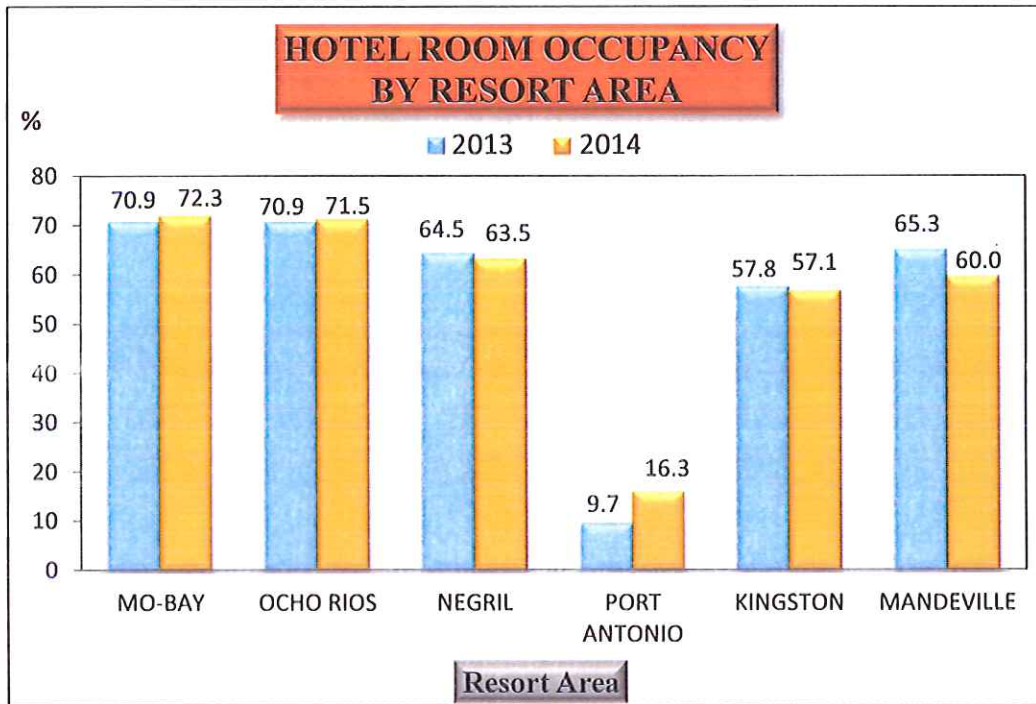


Fig.14

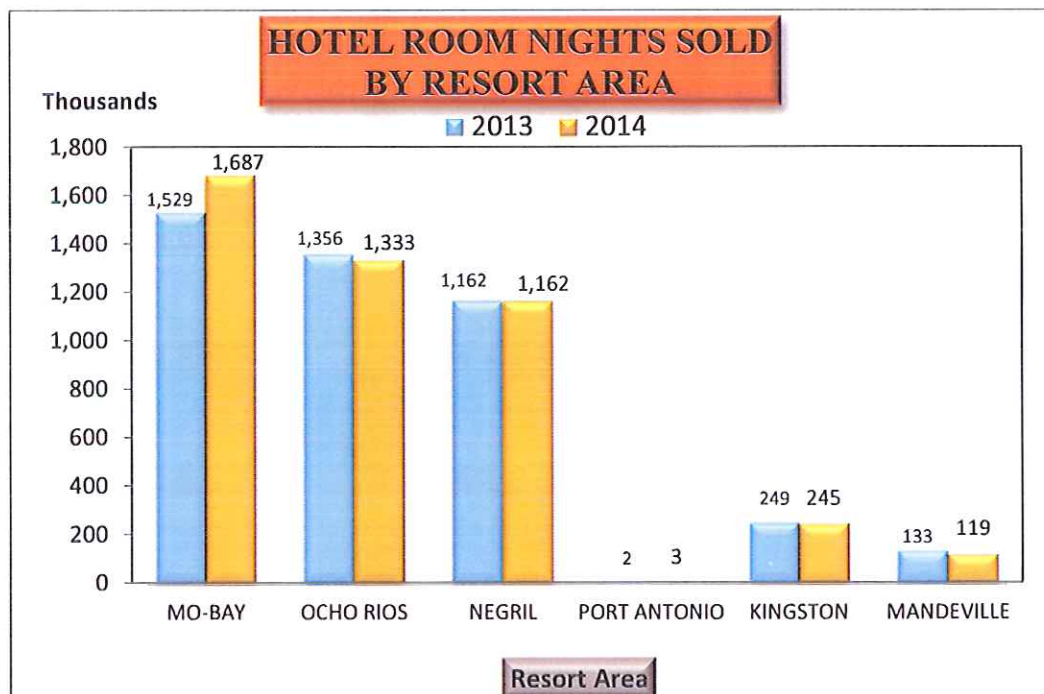


Fig.14a



TABLE 26

## VISITOR ACCOMMODATION BY YEARS AND AREA

2011 - 2014

	R O O M S				%Change 2014/13	%Share 2014	B E D S				%Change 2014/13	%Share 2014
	2011	2012	2013	2014			2011	2012	2013	2014		
<u>HOTELS</u>												
Kingston	1,707	1,728	1,446	1,446	0.0	7.1	3,449	3,495	2,931	2,937	0.2	7.0
Montego Bay	7,092	7,113	6,927	7,558	9.1	37.2	14,465	14,701	14,267	15,499	8.6	36.9
Ocho Rios	5,532	5,829	5,836	5,023	-13.9	24.7	12,432	12,813	12,574	10,898	-13.3	25.9
Negril	5,385	5,350	5,175	5,283	2.1	26.0	10,912	10,844	10,475	10,697	2.1	25.5
Port Antonio	249	209	182	183	0.5	0.9	498	408	354	356	0.6	0.8
Southcoast	700	745	793	817	3.0	4.0	1,440	1,530	1,626	1,624	-0.1	3.9
Total	20,665	20,974	20,359	20,310	-0.2	100.0	43,196	43,791	42,227	42,011	-0.5	100.0
<u>GUEST HOUSES</u>												
Kingston	549	557	586	616	5.1	19.1	1,089	1,105	1,233	1,293	4.9	19.8
Montego Bay	499	499	525	531	1.1	16.5	980	980	1,045	1,055	1.0	16.2
Ocho Rios	433	433	363	390	7.4	12.1	872	872	726	782	7.7	12.0
Negril	766	766	737	772	4.7	24.0	1,534	1,534	1,476	1,550	5.0	23.7
Port Antonio	286	296	302	315	4.3	9.8	579	599	611	637	4.3	9.8
Southcoast	509	510	574	595	3.7	18.5	1,003	1,005	1,129	1,211	7.3	18.6
Total	3,042	3,061	3,087	3,219	4.3	100.0	6,057	6,095	6,220	6,528	5.0	100.0
<u>RESORT VILLAS</u>												
Kingston	12	12	0	0	-	0.0	24	24	0	0	-	0.0
Montego Bay	1,435	1,452	1,087	1,063	-2.2	37.5	2,831	2,867	2,133	2,084	-2.3	37.4
Ocho Rios	1,127	1,050	631	652	3.3	23.0	2,296	2,145	1,274	1,316	3.3	23.6
Negril	838	833	671	694	3.4	24.5	1,648	1,652	1,327	1,373	3.5	24.6
Port Antonio	301	294	235	248	5.5	8.7	606	592	456	483	5.9	8.7
Southcoast	161	160	148	181	22.3	6.4	299	297	273	318	16.5	5.7
Total	3,874	3,801	2,772	2,838	2.4	100.0	7,704	7,577	5,463	5,574	2.0	100.0

**TAB E 26a**  
**VISITOR ACCOMMODATION BY YEARS AND AREA**

**2010 - 2013**

	R O O M S				%Change		B E D S				%Change	
	2011	2012	2013	2014	2014/13	2014	2011	2012	2013	2014	2014/13	2014
<b>APARTMENTS</b>												
Kingston	80	71	71	78	9.9	12.8	160	142	142	156	9.9	12.5
Montego Bay	215	198	128	128	0.0	20.9	430	396	256	256	0.0	20.6
Ocho Rios	363	366	347	330	-4.9	54.0	764	772	704	676	-4.0	54.3
Negril	35	35	49	49	0.0	8.0	76	76	104	104	0.0	8.4
Port Antonio	10	10	10	10	0.0	1.6	20	20	20	20	0.0	1.6
Southcoast	20	20	16	16	0.0	2.6	40	40	32	32	0.0	2.6
<b>Total</b>	<b>723</b>	<b>700</b>	<b>621</b>	<b>611</b>	<b>-1.6</b>	<b>100.0</b>	<b>1,490</b>	<b>1,446</b>	<b>1,258</b>	<b>1,244</b>	<b>-1.1</b>	<b>100.0</b>
<b>ALL TYPES OF ACCOMMODATION</b>												
Kingston	2,348	2,368	2,103	2,140	1.8	7.9	4,722	4,766	4,306	4,386	1.9	7.9
Montego Bay	9,241	9,262	8,667	9,280	7.1	34.4	18,706	18,944	17,701	18,894	6.7	34.1
Ocho Rios	7,455	7,678	7,177	6,395	-10.9	23.7	16,364	16,602	15,278	13,672	-10.5	24.7
Negril	7,024	6,984	6,632	6,798	2.5	25.2	14,170	14,106	13,382	13,724	2.6	24.8
Port Antonio	846	809	729	756	3.7	2.8	1,703	1,619	1,441	1,496	3.8	2.7
Southcoast	1,390	1,435	1,531	1,609	5.1	6.0	2,782	2,872	3,060	3,185	4.1	5.8
<b>Total</b>	<b>28,304</b>	<b>28,536</b>	<b>26,839</b>	<b>26,978</b>	<b>0.5</b>	<b>100.0</b>	<b>58,447</b>	<b>58,909</b>	<b>55,168</b>	<b>55,357</b>	<b>0.3</b>	<b>100.0</b>

Note: 1) Visitor Accommodation excludes closed properties.

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

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

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

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

	2010	2011	2012	2013	2014
MONTEGO BAY	12,818	12,198	12,203	12,041	12,777
OCHO RIOS	9,924	8,964	9,306	8,609	8,406
NEGRIL	9,905	9,407	9,365	9,215	9,810
KINGSTON	2,107	2,182	2,203	1,679	1,760
PORT ANTONIO	1,104	1,118	1,072	1,094	1,113
SOUTHCOAST	1,160	1,052	1,048	1,300	1,300
<b>TOTAL</b>	<b>37,018</b>	<b>34,921</b>	<b>34,921</b>	<b>35,197</b>	<b>35,166</b>

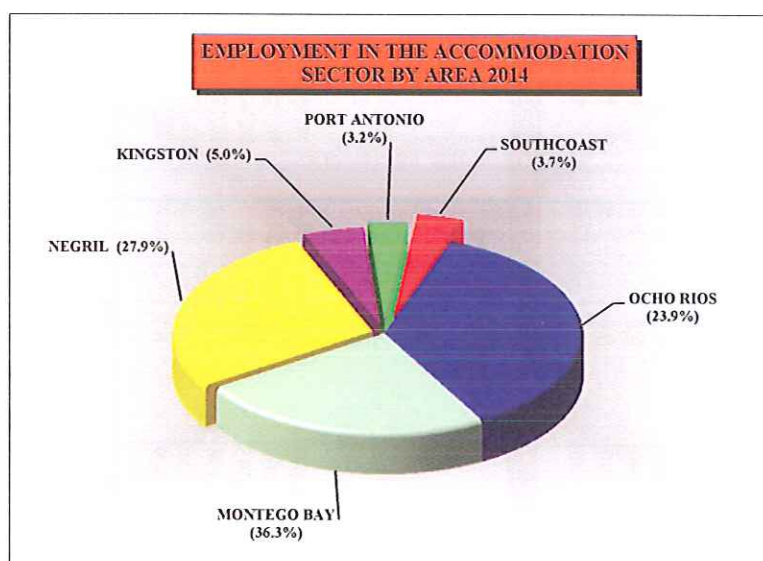
**Fig. 20**



TABLE 28

## TOURIST BOARD BUDGET

	APPROVED	
	JS,000	US\$,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
2014/15	3,066,662	28,395



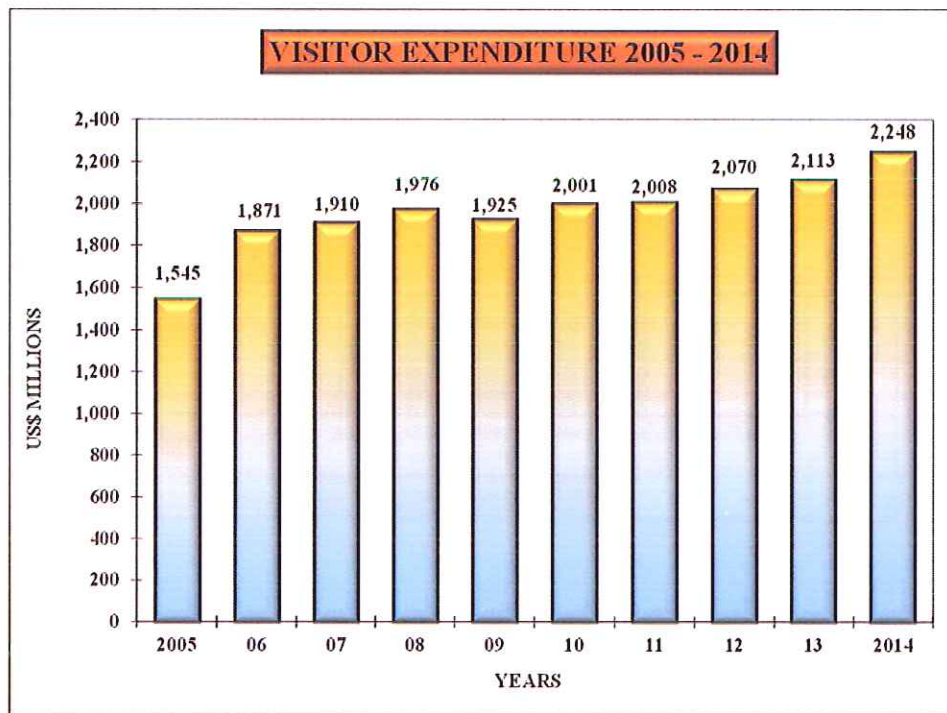
Fig. 21

- 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 2014/15 US\$1 = J\$108.00
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
2013	212,903,531	2,112,767
2014	250,004,097	2,247,834

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

**Fig. 22**

## **APPENDIX II**





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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, 2015, 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, 2015, and of its financial performance and cash flows for the year then ended in accordance with International Financial Reporting Standards.

KPMG

Chartered Accountants  
Kingston, Jamaica

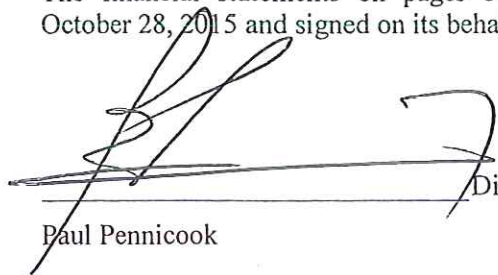
October 28, 2015

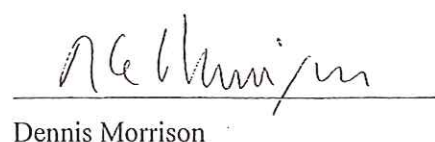


JAMAICA TOURIST BOARDStatement of Financial Position  
March 31, 2015

	Notes	<u>2015</u> \$'000	<u>2014</u> \$'000
CURRENT ASSETS			
Cash and cash equivalents	3	136,913	138,435
Staff computer loans		71	71
Accounts receivable	4	<u>14,626</u>	<u>32,919</u>
		<u>151,610</u>	<u>171,425</u>
CURRENT LIABILITY			
Accounts payable and accruals	5	<u>372,082</u>	<u>221,896</u>
NET CURRENT LIABILITY		(220,472)	( 50,471)
NON-CURRENT ASSET			
Property, plant & equipment	6	<u>6,889</u>	<u>4,198</u>
		<u>(213,583)</u>	<u>( 46,273)</u>
Financed by:			
RESERVES			
Surplus from Tourism Trade Development Board		19	19
Capital expenditure fund	7	6,889	4,198
Accumulated deficit		<u>(220,491)</u>	<u>( 50,490)</u>
		<u>(213,583)</u>	<u>( 46,273)</u>

The financial statements on pages 3 to 23 were approved by the Board of Management on October 28, 2015 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, 2015

	Notes	2015			2014
		Actual \$'000	Budget \$'000	Favourable/ (Unfavourable) Variance \$'000	Actual \$'000
Government Grants:					
Ministry of Tourism		903,585	912,115	( 8,530)	824,428
Caribbean Tourism Organisation (CTO)		15,339	15,339	-	-
Tourism Enhancement Fund	2(h), 12	2,216,880	2,154,547	62,333	1,989,994
Sports Tourism		<u>14,766</u>	<u>-</u>	<u>14,766</u>	<u>-</u>
		<u>3,150,570</u>	<u>3,082,001</u>	<u>68,569</u>	<u>2,814,422</u>
Less grants used for:					
Capital expenditure		<u>7,208</u>	<u>6,968</u>	<u>( 240)</u>	<u>1,887</u>
Amount for operational expenditure		<u>3,143,362</u>	<u>3,075,033</u>	<u>68,329</u>	<u>2,812,535</u>
Operational expenditure:					
USA		514,667	445,406	( 69,261)	460,125
Canada		130,579	115,517	( 15,062)	127,961
Germany		61,527	76,988	15,461	78,882
Deputy director – UK/Europe		114,409	105,484	( 8,925)	98,207
Overseas advertising		1,508,254	1,343,088	( 165,166)	1,269,878
Overseas public relations		202,588	205,338	2,750	203,789
Overseas special projects		114,141	102,725	( 11,416)	155,546
Familiarisation tours		20,430	18,792	( 1,638)	8,943
CTO Marketing fund		-	10,692	10,692	( 35,660)
Marketing representatives		93,315	101,245	7,930	82,837
Membership – International Organisation		<u>25,582</u>	<u>25,002</u>	<u>( 580)</u>	<u>21,621</u>
Balance carried forward		<u>2,785,492</u>	<u>2,550,277</u>	<u>( 235,215)</u>	<u>2,472,129</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, 2015

	<u>2015</u>			<u>2014</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>2,785,492</u>	<u>2,550,277</u>	<u>(235,215)</u>	<u>2,472,129</u>
Local offices expenditure:				
Executive office				
- Director of Tourism Department	45,960	46,874	914	60,000
Destination marketing	107,777	111,148	3,371	107,476
Corporate services	211,807	202,060	( 9,747)	207,708
Finance and administration	66,043	47,265	( 18,778)	54,650
Internal audit	9,842	9,196	( 646)	9,017
Sports tourism	8,956	-	( 8,956)	-
General manager – regional offices (including visitor relations and meet the people)	78,785	83,097	4,312	78,065
Cruise, marine & attractions	<u>22,001</u>	<u>25,503</u>	<u>3,502</u>	<u>26,733</u>
	<u>551,171</u>	<u>525,143</u>	<u>( 26,028)</u>	<u>543,649</u>
Other:				
Foreign exchange losses/(gain)	<u>10,358</u>	<u>-</u>	<u>( 10,358)</u>	<u>( 13,183)</u>
TOTAL EXPENDITURE	<u>3,347,021</u>	<u>3,075,420</u>	<u>(271,601)</u>	<u>3,002,595</u>
Other income:				
Gain on disposal of motor vehicle	1,462	-	1,462	-
Interest income	386	-	386	513
Miscellaneous income	<u>31,810</u>	<u>-</u>	<u>31,810</u>	<u>33,409</u>
	<u>33,658</u>	<u>-</u>	<u>33,658</u>	<u>33,922</u>
Deficit for the year, being total comprehensive loss	<u>( 170,001)</u>	<u>( 387)</u>	<u>(169,614)</u>	<u>( 156,138)</u>

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

JAMAICA TOURIST BOARD

Statement of Changes in Reserves  
Year ended March 31, 2015

	Surplus from Tourism Trade Development Board \$'000	Capital expenditure fund \$'000	Accumulated deficit \$'000	Total \$'000
Balances at March 31, 2013	19	5,147	105,648	110,814
Net proceeds from disposals	-	( 949)	-	( 949)
Total deficit recognised in 2014	<u>-</u>	<u>-</u>	<u>(156,138)</u>	<u>(156,138)</u>
Balances at March 31, 2014	19	4,198	( 50,490)	( 46,273)
Net capital expenditure	-	2,691	-	2,691
Total deficit recognised in 2015	<u>-</u>	<u>-</u>	<u>(170,001)</u>	<u>(170,001)</u>
Balances at March 31, 2015	<u>19</u>	<u>6,889</u>	<u>(220,491)</u>	<u>(213,583)</u>

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

JAMAICA TOURIST BOARD

Statement of Cash Flows  
Year ended March 31, 2015

	<u>2015</u> \$'000	<u>2014</u> \$'000
CASH FLOW FROM OPERATING ACTIVITIES:		
Deficit for the year	(170,001)	(156,138)
Adjustments to reconcile deficit for year to net cash (used)/provided by operating activities:		
Interest income	( 386)	( 513)
Depreciation	4,260	2,835
Gain on disposal of motor vehicle	( 1,462)	-
	(167,589)	(153,816)
Decrease in current assets:		
Accounts receivable and staff computer loans	18,293	17,306
Increase in current liability:		
Accounts payable and accruals	<u>150,186</u>	<u>(143,567)</u>
Net cash provided/(used) by operating activities	<u>890</u>	<u>(280,077)</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Additions to property, plant & equipment	( 7,208)	( 1,887)
Interest received	386	513
Proceeds from sale of motor vehicle	<u>1,719</u>	-
Net cash used by investing activities	( 5,103)	( 1,374)
CASH FLOWS FROM FINANCING ACTIVITY		
Capital expenditure fund, being net cash generated/(used) by financing activity	<u>2,691</u>	( 949)
Net decrease in cash and cash equivalents	( 1,522)	(282,400)
Cash and cash equivalents at beginning of the year	<u>138,435</u>	<u>420,835</u>
Cash and cash equivalents at end of the year	<u>136,913</u>	<u>138,435</u>

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



## JAMAICA TOURIST BOARD

### Notes to the Financial Statements March 31, 2015

#### 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, 2015 (2014: 129).

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

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

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

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

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

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

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

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

## JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2015

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

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

- IFRS 15, *Revenue from Contracts with Customers* is effective for periods beginning on or after January 1, 2017. It replaces IAS 11 *Construction Contracts*, IAS 18 *Revenue*, IFRIC 13 *Customer Loyalty Programmes*, IFRIC 15 *Agreements for the Construction of Real Estate*, IFRIC 18 *Transfer of Assets from Customers* and SIC-31 *Revenue – Barter Transactions Involving Advertising Services*. The new standard applies to contracts with customers. However, it does not apply to insurance contracts, financial instruments or lease contracts, which fall in the scope of other IFRSs. It also does not apply if two companies in the same line of business exchange non-monetary assets to facilitate sales to other parties. Furthermore, if a contract with a customer is partly in the scope of another IFRS, then the guidance on separation and measurement contained in the other IFRS takes precedence.
- IAS 1 *Presentation of Financial Statements*, effective for accounting periods beginning on or after January 1, 2016, has been amended to clarify or state the following:
  - specific single disclosures that are not material do not have to be presented even if they are a minimum requirement of a standard.
  - the order of notes to the financial statements is not prescribed.
  - line items on the statement of financial position and the statement of profit or loss and other comprehensive income (OCI) should be disaggregated if this provides helpful information to users. Line items can be aggregated if they are not material.
  - specific criteria is now provided for presenting subtotals on the statement of financial position and in the statement of profit or loss and OCI, with additional reconciliation requirements for the statement of profit or loss and OCI.
  - the presentation in the statement of OCI of items of OCI arising from joint ventures and associates accounted for using the equity method follows IAS 1 approach of splitting items that may, or that will never, be reclassified to profit or loss.
- *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 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, 2015

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

(a) Statement of compliance (continued):

- *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 are as follows (continued):
  - 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/amortisation 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.
- *Improvements to IFRS, 2012-2014* cycle contain amendments to certain standards and interpretations and are effective for accounting periods beginning on or after January 1, 2016 are as follows:
  - IFRS 7, *Financial Instruments: Disclosures*, has been amended to clarify when servicing arrangements are in the scope of its disclosure requirements on continuing involvement in transferred assets in cases when they are derecognized in their entirety. A servicer is deemed to have continuing involvement if it has an interest in the future performance of the transferred asset e.g. if the servicing fee is dependent on the amount or timing of the cash flows collected from the transferred financial asset; however, the collection and remittance of cash flows from the transferred asset to the transferee is not, in itself, sufficient to be considered 'continuing involvement'.

## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2015

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

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

- Amendments to IAS 16 and IAS 38, *Clarification of Acceptable Methods of Depreciation and Amortisation*, are effective for accounting periods beginning on or after January 1, 2016.
  - The amendment to IAS 16, *Property, Plant and Equipment* explicitly state that revenue-based methods of depreciation cannot be used. This is because such methods reflect factors other than the consumption of economic benefits embodied in the assets.
  - The amendment to IAS 38, *Intangible Assets* introduce a rebuttable presumption that the use of revenue-based amortisation methods is inappropriate for intangible assets.

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

##### (b) Basis of preparation:

The financial statements are presented in Jamaica dollars (\$'000), which is the currency in which the Board conducts the majority of its operations. All financial information presented in Jamaica dollars have been rounded to the nearest thousands, except when otherwise indicated.

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 \$170,001,000 for the year ended March 31, 2015 (2014: \$156,138,000). As at the same date, current liabilities exceed current assets by \$220,472,000 (2014: \$50,471,000).

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.



## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2015

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

##### (c) Estimates and judgements (continued):

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.

##### (e) Accounts receivable:

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

##### (f) Accounts payable:

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

##### (g) 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(j)].

##### (h) Depreciation:

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

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

## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2015

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

##### (i) Provisions:

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

##### (j) Impairment:

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

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

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

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

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

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

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

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2015

2. Basis of preparation, statement of compliance and significant accounting policies (continued)

(k) Financial instruments:

A financial instrument is any contract that gives rise to both a financial asset of one enterprise and a financial liability or equity instrument of another enterprise. For the purpose of these financial statements, financial assets have been determined to include cash and cash equivalents, staff car loans, accounts receivable and staff computer loans and financial liability comprise accounts payable.

(l) Foreign currencies:

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

(m) Income:

Government grants are recognised when received or deemed received.

(n) Interest income:

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

3. Cash and cash equivalents

	<u>2015</u> \$'000	<u>2014</u> \$'000
Cash at bank	131,595	133,221
Imprest accounts	<u>5,318</u>	<u>5,214</u>
	<u>136,913</u>	<u>138,435</u>



# JAMAICA TOURIST BOARD

## Notes to the Financial Statements (Continued) March 31, 2015

### 4. Accounts receivable

	<u>2015</u> \$'000	<u>2014</u> \$'000
Ministry of Tourism	1,393	1,286
Tourism Enhancement Fund	1,218	-
Tourism Product Development Company Limited	5,004	4,642
Jamaica Vacations Limited	86	78
Ministry of Transport and Works	-	150
Prepayments and deferred expenses	8,256	27,650
Others	<u>3,813</u>	<u>4,257</u>
	19,770	38,063
Less: impairment allowance	( <u>5,144</u> )	( <u>5,144</u> )
	<u>14,626</u>	<u>32,919</u>

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 as follows:

	<u>2015</u>		<u>2014</u>	
	<u>Gross</u> \$'000	<u>Impairment</u> \$'000	<u>Gross</u> \$'000	<u>Impairment</u> \$'000
Not past due	1,301	-	987	-
Past due 31-60 days	25	-	19	-
Past due 61-90 days	-	-	6	-
Past due over 90 days	<u>6,375</u>	<u>5,144</u>	<u>5,144</u>	<u>5,144</u>
	<u>7,701</u>	<u>5,144</u>	<u>6,156</u>	<u>5,144</u>

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

	<u>2015</u> \$'000	<u>2014</u> \$'000
Balance at beginning and end of the year	<u>5,144</u>	<u>5,144</u>

### 5. Accounts payable and accruals

	<u>2015</u> \$'000	<u>2014</u> \$'000
Trade payables	247,082	93,684
Accrued charges	123,495	126,653
Other	<u>1,505</u>	<u>1,559</u>
	<u>372,082</u>	<u>221,896</u>



## JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 20156. Property, plant and equipment

	Freehold land and buildings \$'000	Furniture, fixtures and equipment \$'000	Motor vehicle \$'000	Total \$'000
Cost:				
March 31, 2013	294	115,504	7,800	123,598
Additions	-	1,887	-	1,887
Disposal	-	( 491)	-	( 491)
March 31, 2014	294	116,900	7,800	124,994
Additions	-	1,689	5,519	7,208
Disposal	-	-	(4,297)	( 4,297)
March 31, 2015	<u>294</u>	<u>118,589</u>	<u>9,022</u>	<u>127,905</u>
Depreciation:				
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	269	113,174	7,353	120,796
Charge for the year	-	3,334	926	4,260
Eliminated on disposal	-	-	(4,040)	( 4,040)
March 31, 2015	<u>269</u>	<u>116,508</u>	<u>4,239</u>	<u>121,016</u>
Net book values:				
March 31, 2015	<u>25</u>	<u>2,081</u>	<u>4,783</u>	<u>6,889</u>
March 31, 2014	<u>25</u>	<u>3,726</u>	<u>447</u>	<u>4,198</u>

Freehold land and buildings include freehold land at a cost of \$25,000 (2014: \$25,000).

7. Capital expenditure fund

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

## JAMAICA TOURIST BOARD

### Notes to the Financial Statements (Continued) March 31, 2015

#### 8. Disclosure of expenses

Deficit for the year is stated after charging:

	<u>2015</u> \$'000	<u>2014</u> \$'000
Depreciation	4,260	2,835
Directors' emoluments:		
Fees	802	797
Remuneration	22,487	23,365
Auditors' remuneration	1,200	1,200
Staff costs	<u>667,929</u>	<u>652,189</u>

#### 9. Tourism Enhancement Fund

The Jamaica Tourist Board received additional funding from the Tourism Enhancement Fund (T.E.F) in the amount of \$2,216,880,212 (2014: \$1,989,994,070). These funds were used to assist in the Board's advertising and special projects expenses and include:

	<u>2015</u> \$'000	<u>2014</u> \$'000
Advertising/marketing activities:		
Winter advertising	2,182,368	1,960,856
Tourism outlook seminar	11,898	1,014
Island Jamaica T20 cricket tournament	8,000	24,659
Taste of the caribbean	4,468	2,000
Youth Orchestra	5,632	-
Sumfest	500	-
IMF Delegation – "Unlocking Economic Growth"	3,479	-
Dinner for customs and immigration officers	<u>535</u>	<u>1,465</u>
	<u>2,216,880</u>	<u>1,989,994</u>

#### 10. Taxation

The Board is exempt from taxation of surpluses arising from normal operating activities and other income.

#### 11. Pension scheme

Overseas pension scheme:

The Board's overseas employees participate in a money purchase pension plan administered by Equitable Life Assurance, Florida. The plan commenced March 31, 1976. The Board contributes, on an annual basis, 10.5% of employees' annual compensation. 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, 2015

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### 11. Pension scheme (continued)

#### 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, 2015

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

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

	<u>2015</u> \$'000	<u>2014</u> \$'000
Accounts receivable:		
Ministry of Tourism	1,393	1,286
Tourism Product Development Company Limited	5,004	4,642
Jamaican Vacation Limited	86	78
Ministry of Transport and Works	-	150
Tourism Enhancement Fund	<u>1,218</u>	<u>-</u>
	<u>7,701</u>	<u>6,156</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>2015</u> \$'000	<u>2014</u> \$'000
Income:		
Ministry of Tourism (including C.T.O marketing grant)	918,924	824,428
Tourism Enhancement Fund (including sports tourism grant)	<u>2,216,880</u>	<u>1,989,994</u>
	<u>3,135,804</u>	<u>2,814,422</u>

#### 13. Financial instruments

##### Financial instrument risk:

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

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

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)  
March 31, 2015

13. Financial instruments (continued)

Financial instrument risk (continued):

## (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>2015</u> \$'000	<u>2014</u> \$'000
Staff computer loans	71	71
Cash and cash equivalents	136,913	138,435
Accounts receivable	<u>14,626</u>	<u>32,919</u>
	<u>151,610</u>	<u>171,425</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, 2015

#### 13. Financial instruments (continued)

Financial instrument risk (continued):

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

- 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>2015</u>	<u>2014</u>
	<u>\$'000</u>	<u>\$'000</u>
Variable rate:		
Assets	<u>6,032</u>	<u>71,043</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 (2014: 250) basis points in interest rates at the reporting date would have decreased the deficit by \$150,800 (2014: \$1,776,000). This assumes that all variables remain constant.

An decrease of 100 (2014: 100) basis points in interest rates at the reporting date would have increased the deficit by \$60,320 (2014: \$710,430). 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, 2015

### 13. Financial instruments (continued)

#### Financial instrument risk (continued):

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

##### • Foreign currency risk (continued):

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

	Net foreign currency (liabilities)/assets 2015				Net foreign currency (liabilities)/assets 2014			
	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000
Cash and cash equivalents	97	987	77	48	6	861	93	106
Accounts receivable	-	25	8		-	15	8	-
Accounts payable	(151)	(2,481)	(56)	(194)	(130)	(1,229)	(52)	(131)
	(54)	(1,469)	29	(146)	(124)	(353)	49	(25)

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

	USD	EURO	GBP	CDN
March 31, 2015:	115.04	124.57	169.97	90.62
March 31, 2014:	<u>109.57</u>	<u>150.68</u>	<u>179.38</u>	<u>98.93</u>

A 1% (2014: 15%) strengthening of the above currencies against the Jamaica dollar would have decreased deficit by \$1,847,077 (2014: \$7,647,913).

A 10% (2014: 1%) weakening of the above currencies against the Jamaica dollar would have increased deficit by \$18,462,722 (2014: \$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, 2015

#### 13. Financial instruments (continued)

##### Financial instrument risk (continued):

##### (iii) Liquidity risk (continued):

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, 2015:			
Accounts payable and accruals	<u>372,082</u>	<u>372,082</u>	<u>372,082</u>
March 31, 2014:			
Accounts payable and accruals	<u>221,896</u>	<u>221,896</u>	<u>221,896</u>

#### 14. Fair value of financial instruments

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

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

<u>Financial instrument</u>	<u>Method</u>
Cash and cash equivalents, accounts receivable, and accounts payable.	Assumed to approximate their carrying values, due to their short-term nature.





## **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
		\$	\$	\$	\$	\$	\$	\$
Director of Tourism 1-(Contract)	2014/2015	2,150,000	Gratuity	447,345	No	2,541,666	74,406	4,766,072
Director of Tourism 2-(Contract)	2014/2015	10,766,609	Gratuity	4,784,413	No		105,824	10,872,433
D/Director - Marketing (Contract)	2014/2015	5,650,000	Grat./Perf.Incentive	975,750	No	1,525,000	136,980	7,311,980
D/Director - Cruise, Events & Attractions	2014/2015	5,383,438	Perform. Incentive	975,750	Yes	590,229	233,226	6,206,893
Head, Corporate Services (Contract)	2014/2015	5,690,256	Grat./Perf.Incentive	975,750	No	25,000	132,671	5,847,927
Chief Financial Officer (Contract)	2014/2015	5,124,232	Grat./Perf.Incentive	975,750	No	25,000	106,847	5,673,785
Regional Director - Jamaica 1- (Contract)	2014/2015	2,436,390	Grat./Perf.Incentive	650,500	No	442,706	118,986	2,998,082
Regional Director - Jamaica 2- (Contract)	2014/2015	798,666	Grat./Perf.Incentive	162,625	No	6,151	20,444	825,261
Senior Manger, Information Systmes (Contract)	2014/2015	4,958,262	Grat./Perf.Incentive	975,750	No	25,000	131,963	5,115,225
OVERSEAS OFFICECS								
POSITION OF SENIOR EXECUTIVE								
		US\$		US\$		US\$	US\$	US\$
D/Director - Sales USA	2014/2015	81,756	Perform. Incentive	9444	Yes	64,852	47,468	
Regional Director - Tour Operator & Airlines	2014/2015	73,321	Grat./Perf.Incentive	9444	Yes	33,660	42,335	
Regional Director - Groups & Convention	2014/2015	77,862	Perform. Incentive	9444	Yes	59,070	42,618	
		CAN\$		CAN\$		CAN\$	CAN\$	CAN\$
Regional Director - Canada	2014/2015	100,531	Perform. Incentive	13212	Yes	82,698	26,134	
		£				£	£	£
Regional Director - UK	2014/2015	46,903	Perform. Incentive	5688	Yes	35,584	19,753	
		€		€		€	€	€
Regional Director - Europe	2014/2015	58,909	Perform. Incentive	8760	Yes	39,471	9,869	

**JAMAICA TOURIST BOARD**  
**Board Directors Compensation 2014/2015**

	Position of Director		Fees	Motor Vehicle Upkeep/Travelling	Honararia	Other Compensation	Total
			J\$	J\$	J\$	J\$	J\$
Dennis Morrison	Chairman		87,500.00				87,500.00
Gordon Brown	Member		55,000.00	468,541.00			523,541.00
Evelyn Smith	Member		41,000.00				41,000.00
Paul Pennicook	Member		22,500.00				22,500.00
Wayne Cummings	Member		29,500.00				29,500.00
Carolyn Wright	Member		66,000.00	323,736.00			389,736.00
Mark Melville	Member		37,500.00				37,500.00
Zein Issa Nakash	Member		65,500.00				65,500.00
Noel Sloley JR	Member		59,000.00				59,000.00
Nicola Madden Greig	Member		15,000.00				15,000.00