

*Annual Report
of the*

JAMAICA TOURIST BOARD

April 2016 - March 2017



ANNUAL REPORT

OF THE

JAMAICA TOURIST BOARD

APRIL 2016 – MARCH 2017

JAMAICA TOURIST BOARD

MISSION STATEMENT

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

VISION STATEMENT

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

**ANNUAL REPORT
APRIL 2016 – MARCH 2017**

JAMAICA TOURIST BOARD

BOARD OF DIRECTORS

APRIL 1, 2016 – MARCH 31, 2017

- | | | |
|--------------------------------------|---|--|
| 1) Mr. John Lynch | - | Chairman of the Board |
| 2) Mr. Paul Pennicook | - | Director of Tourism |
| 3) Mrs. Nicola Madden-Greig | - | President of the Jamaica Hotel & Tourist Association |
| 4) Mr. Wayne Cummings | - | Hotelier, Sandals Resort International |
| 5) Mr. Godfrey Dyer | - | Tourism Consultant |
| 6) Mr. Josef Forstmayr | - | Hotelier, Round Hill Hotel & Villas |
| 7) Mr. Philipp Hofer | - | Hotelier, Iberostar Hotels & Resorts |
| 8) Mr. Lionel Reid | - | Hotelier, Tourism Consultant |
| 9) Mr. Paul Simpson | - | Investment Banker |
| 10) Mr. Fred Smith | - | Ground Transportation Executive |
| 11) Mr. Bert Wright | - | Ground Transportation Executive |
| 12) Ms. Hyacinth "Cindy" Lightbourne | - | Attorney-at-Law |
- (Appointed May 30, 2016)

INTRODUCTION / OVERVIEW

This overview will provide an update on the initiatives the JTB has undertaken in the last year; outline some of the results of those activities and share a bit of our strategy for the coming year.

A quick summary of results for 2016:

- We achieved over 3.8 million visitors last year, with 2.18 million stopover and 1.6 million cruise visitors
- Cruise arrivals saw a 5.5% increase over 2015, with Montego Bay and Ocho Rios increasing by 22% and 10.5% respectively.
- For **winter 2017**, January to April, we welcomed over 1.6 million visitors. Compared to last winter, we saw a growth from all our main markets. Of particular note was Canada achieving a 5.7% increase. Likewise, we achieved increases from Latin America and Asia of 9.3% and 7.1% respectively.

With all of that said, we have the airlift and we have the capacity to welcome visitors from all over the world. But what we have to keep in mind are the travel trends that are changing the way and why people travel. We must ensure our destination is top of mind for all travelers.

Some of these global travel trends include:

- 'Microadventure' growing travel trend among travelers
- Travellers are demanding authentic experiences
- Sustainable tourism taking centre stage
- Festivalisation of meetings emerging trend
- Restaurants are becoming destinations themselves
- More people would rather spend on travel experiences than material objects
- In 1996, US was home to 34,000 travel retail locations, now the number is 13,000
- Today, 60% of leisure and 41% of business travelers are booking travel online

Consumer Behaviour Trends

- Consumer expectations and demands are never-ending - Brands have to understand that consumers are more demanding than ever.
- Real-time customer service is pivotal - The process of connecting and interacting with retailers is altering, as consumers demand more responsive and authentic customer service tools.

- Personalization is key to a consumer's wallet - Consumers understand that activity and purchases equate to a collection of information and preferences by the retailer.
- The rise of omni-channel and mobile purchasing - Mobile devices are making it even more convenient for consumers to shop, accounting for 30% of global retail e-commerce in 2016. Social media is a major driver of mobile's projected growth. With platforms like Facebook Live, Snapchat Discover & Instagram Stories ramping up their video products, researchers predict that the trend will only continue. Projections are that social video ad spend will jump from US\$2 billion in 2016 to US\$8 billion in 2018 and for digital ad spend to exceed TV in North America, starting in 2017.

We are cognizant of this shift in consumer media consumption habits and have already begun to adapt our strategies accordingly. For the past three years, we have been shifting our spend in traditional channels to digital. We now allocate more than 50% of our U.S. advertising budget to digital platforms with increasing emphasis on social media. This shift to digital media allows us to be more efficient and targeted.

Among the major initiatives undertaken by the JTB during the year under review were:

Jamaica House in Rio de Janeiro from August 15-21, which served as a global stage for Jamaica's cultural offerings and included a National Senior Trials Press Trip (Jamaica), Brazilian Blogger Event (Rio de Janeiro), Trade Event (Rio de Janeiro), Olympic Watch Parties (New York, Fort Lauderdale, Baltimore, Los Angeles, Toronto), Celebrity Influencer Appearances (Rio de Janeiro) and media visits (Rio de Janeiro). We designed and developed the "Reggae Rocks Brazil" Facebook app/aggregator that lived on the Jamaica Tourist Board's U.S. and U.K. Facebook pages between August 5 and August 21. The total number of media impressions as a result of public relations in support of Jamaica House totaled **3,969,057,316**. Our global social media results were also quite impressive with nearly 10 million reach

The Feel the Vibe Jamaica Influencer Campaign

An influencer is an individual who consistently posts or tweets about your topic or issue, has a high number of followers, and whose content is shared widely. Working with influencers offers brands a way to generate on-message content that translates to consumers as authentic. Brand mentions have stronger social meaning and reach than a simple tweet or post from a branded social channel.

Influencers are not necessarily experts, but their credibility is their brand. Therefore, their audiences trust what they have to say. 90% of consumers trust peer recommendations over brand advertisements.

Influencers exist on several different channels, including YouTube, social media channels like Facebook, Instagram and Twitter, bloggers, as well as celebrities with strong followers on any of these channels.

The 'Feel the Vibe Jamaica' influencer campaign ran from February – April 2017. The JTB worked with seven influencers from USA, Canada and UK to experience the off the beaten path Jamaica and share it with their audiences using the hashtag #FeelTheVibeJamaica. Tapping into the trends of authentic experiences, itineraries were designed to surprise and delight each of them based on their specialties including culinary, adventure, lifestyle, romance, etc.

It was a fully integrated campaign utilizing several touchpoints to influence consumers' travel decisions and drive intent. These touchpoints included display advertising, social media boosted posts, microsite, JTB custom content, and of course the influencers content. Traffic to the microsite was 40K in eight weeks; Instagram followers increased by 10K.

The results clearly reflect not only the power of influencers, but also the popularity of Jamaica. To put it into perspective, the world's population is 7.5 billion. Our campaign's reach was over 1 billion.

In all of our marketing and communications, we now include some sort of influencer component since consumers are using social media and digital channels increasingly to inspire their travel decisions. Not only that, they see influencers as presenting authentic experiences and trust their recommendations much more than advertising.

As we look ahead to the remainder of the year and onward, we continue to work to maximize the efficiency of our spend by focusing on more global integrated campaigns that meld advertising, public relations, and in-market activities to ensure our messaging is aligned across the world.

To do that, we will:

- Ramp up in-market activity
- Increase media and influencer visits
- Exploit social media
- Leverage on island events to create visitor urgency
- For Q2 and Q3 2017 we will continue to leverage digital.
- We will increase the use of social videos and continue to apply tracking tactics to measure effectiveness and identify opportunities for growth.

- More importantly, we will continue to stretch our dollar as much as we can, leveraging more high performing channels and platforms to increase our efficiency. We want to get more for less – that is more reach and impressions for every dollar we spend.
- In an effort to ramp up our in-market presence we will be extending the FeelTheVibe campaign through the popular way of connecting with consumers – the Pop Up Shop. We will bring the sights, sounds and tastes of Jamaica to three cities in North America – New York, Chicago and Calgary. Again, we will be using multi-channels to promote via digital and social.
- Paid social media advertising on Facebook, Twitter, Instagram and YouTube reaching up to 10 million consumers
- The Experience Jamaica Caribbean campaign for 2017 will be launched in Trinidad in July 2017 with a Jamaica Village. The campaign will once again be a digital campaign driving users to a microsite with offers from hotel, attraction and transportation partners.
- Again, our strategy is to bring Jamaica in-market; creating opportunities for consumers to see, hear, taste, smell and touch a bit of Jamaica.
- In order to increase our visibility we have to rely more heavily on media. News is a 24 hour/day cycle. However, the product that we promote belongs to our partners, so we need their support, from accommodations, attractions, restaurants, etc., to facilitate these activities.
- Naturally, given the penetration of social media, we will exploit this channel even more. A robust content calendar will maintain consistency and add increased engagement. With digital, whereas content is king, with social, video is the emperor. So more video content will be integrated in our content strategy.
- We will leverage user generated content and continue to engage social partners to drive reach, impressions and more importantly engagement.
- And finally, local events provide great opportunities to build brand awareness, create urgency for arrivals and allow us to position Jamaica as a “must” visit destination. We are, and will continue to use creative approaches with our partnership with event organisers.

2016 PERFORMANCE

Stopover arrivals for 2016 were 2.18 million, with all regions showing growth except for Canada, Latin America and Asia.

- The US was up 4.6%
- Canada was down 4.9%
- UK/Europe was up 5.5% (UK specifically was up 3.8%)
- The Caribbean was up by 4.8%

- Asia & Pacific were down 3.1%, and
- Latin America was down 5.7%

Overall performance for calendar year 2016:

- Stopover arrivals of 2,181,684 increased by 2.8%
- Cruise passenger arrivals of 1,655,565 increased by 5.5%
- Total Arrivals of 3,837,249 increased by 3.9%
- Gross foreign exchange earnings estimated at US\$2.609 billion, an increase of 8.6%.
- The average hotel room occupancy rate was 64.1%.
- Total capacity in the accommodation (excluding closed rooms) sub-sector stood at 29,866 rooms, of which 22,912 were in hotels and another 6,954 in villas, guesthouses and apartments.

ADVERTISING ACTIVITIES WORLDWIDE

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

The following summarizes FCB advertising activities on behalf of the Jamaica Tourist Board for FY 2016/2017 in the United States, Canada and United Kingdom.

In the 2016/2017 period, a mix of continuing and new initiatives were implemented.

Continuing Use of Digital Media

We saw an increase in use overall of digital media as part of the overall media buy. This is consistent with changing consumer trends in media consumption. The travel category is now one where virtually every traveler plans and buys at least part if not all of their trip online: from dreaming to consideration, to the evaluation of options, to making the actual purchase, and even during/after a trip to posting photos and commentary on social media. The goal of the JTB's advertising and marketing efforts is therefore to be present when steering consumers in the direction of Jamaica can most readily occur. This is during the dreaming and consideration phases and also to some extent while different options are being evaluated.

It is also important to understand that digital doesn't mean merely static and animated content, video is in fact a very robust component of digital. Therefore the JTB media effort continues to evolve to include online video as well as continuing offline video (broadcast) to capture the multi-screen viewing habits of today's consumers.

The evolution also continues to favor mobile, as consumers are more and more engaging with mobile devices vs. desktop or tablets.

Updating the Target Audience

One important initiative undertaken in 2016/2017 was the updating of our target audience's definition. This was done to enable marketing efforts to more precisely target those who, based on current Jamaica traveler data, would be most likely to choose Jamaica. We called this audience "sensorial seekers". They are people who demand more from a vacation than relaxation alone. These people are also looking for experiences to re-energize them and give them content to post on social media about their trip. The activities offered by Jamaica and its inherent culture driven by music and food make Jamaica an ideal choice.

Continuing to use Home of All Right

Messaging continued to employ “Home of All Right” branding through the tagline and executions. TV spots were re-edited going into the fall/winter season to emphasize the uniqueness of Jamaica and feature more of Jamaica’s ‘beyond the beach’ culture. We began using the line, “Only in Jamaica” in copy.

Digital Sub-Campaign, “All You Can”

Also going into the summer season, a sub-campaign under Home of All Right in digital using the phrase “All You Can” was developed and implemented to highlight events targeting travelers interested in music, food and sport. The effort was designed to give travelers an immediate reason to book Jamaica. It ran in both the U. S. and Canada and was quite successful.

Competitive

Jamaica fell to #7 in spending among key Caribbean competitors. As in the previous year, the efficient use of more digital media coupled with the updated definition of the target audience has enabled the JTB to maintain impact despite losing to competition in terms of spending ranking. It will be a challenge to continue to rely on efficiency alone to achieve impact among our competitive set.

Understanding what works...even better!

We continue to practice on-going optimization of media and creative efforts by virtue of the analytics digital media affords us. This is highly evident in the strategies employed particularly in the US and Canada where we have seen continuing improving delivery and efficiencies.

USA

Television

Jamaica’s 2016-17 National Cable activity aired for three consecutive weeks in 4Q16 and for nine total weeks in 1Q17. Our 45% :15s/ 55% :30s plan delivered 210 GRPs across several top tier cable networks including CNN, HFTV, TNT, and ION. In 2016-17 we continued to utilize our Advanced TV partnership with Cadreon to target ‘Sensorial Seekers’ audience on several incremental networks including AMC, USA, Spike, Freeform, FX, and TBS while delivering 34 GRPs. National TV delivered a total of 293,874,000 A25-54 Impressions.

Local TV aligned with National Cable activity in Q4 and Q1 to boost GRP levels in key markets, NY and Baltimore. Ran 10 GRPs a week in each market utilizing 100% :30s. In Q4 Jamaica ran in programs including Blindspot, The Voice, Gotham, and Survivor.

Digital Activity/Social Activity

In order to engage beyond standard demographics and reach Adventure/Sensorial Seekers, Digital activity focused on two verticals throughout FY '16/'17: Display and Video. The campaign was geo-targeted to Jamaica's priority markets including New York, Chicago, Boston, Philadelphia, Baltimore, D.C., Atlanta, Houston, Los Angeles, Miami, Orlando, West Palm Beach, Austin, and Dallas. An always-on strategy was implemented for continual messaging throughout the campaign. Based on the seasonality of travel to the Caribbean, the majority of spend occurred during the peak planning/vacationing months in Q4'16/Q1'17 and minimal spend was delivered during the slow months of August and September '16. Campaign activity centered around audience targeting tactics with programmatic buying partner, Cadreon, for standard display and video reaching the Jamaica target audience wherever they engaged online. The majority of Video targeting activity was implemented through cross-screen (desktop & mobile/tablet) tactics and served via partners including Adtheorent and YouTube. The campaign delivered a total of 188,136,621 A25-54 digital impressions. 58.82% above planned impressions (131,716,012).

In Q1'17, the campaign continued previous successes and built presence in Social by engaging social influencers, thereby increasing consumer engagement opportunities with Jamaica. This social campaign was heavy around Q1'17 activity when potential travelers are most likely to get inspiration for trips and research/plan. The Social campaign activity incorporated influencer targeting tactics on Instagram, Facebook and Pinterest with twelve high-profile influencer posts including posts by Indulgent Eats, Planet D, and Vaga Brothers. The campaign delivered a total of 52,066,546 A25-54 digital impressions, 69.91% above planned impressions (22,413,948).

Paid Search

Our search strategy continues to be always on, 24/7 365 days a year, targeted nationally across the United States. Analytics show that high density population areas deliver the strongest results with CTR (click through rates) of 2.04% and CPC (cost per click) \$1.94 respectively. Keywords that lean towards specific activities and facts (culture, weather) about the island tend to perform best. Weather related content attributed to 20% of all incoming traffic. Mobile queries were up for 2016, and more traffic comes from mobile devices now than ever before. Seasonality does spike at certain points in the year and we found that searches do increase around hurricane season between June and November. We are using this upcoming year to understand better the value of search traffic to driving engagement depending upon the search terms used.

Out-of-Home Activity

Jamaica's OOH strategy shifted from placements on major suburban railways in NY in 2016 to a video focus with Digital bus shelters, video in health clubs and Cinema in Q1 2017. Overall, the combined OOH campaign performed well by delivering 66% more targeted impressions than originally planned (12,727,773 vs. 7,647,591).

Cinema ran across 541 screens throughout the NY DMA for an 8 week period (12/30/17-3/2/17) garnering a total of 2,663,007 A 25-54 impressions. As added value the brand received an additional week of media placement (2/24-3/2) in addition to running in the cinema locations Lobby Entertainment Network that garnered an additional 1,009,858 targeted impressions.

The Digital bus shelter campaign ran a :15 spot and was in market for 8 weeks (1/2/17-2/26/17) with a total of 35 units (24 purchased + 11 added value) that ran throughout Manhattan below 96th Street and delivered a total of 5,954,136 across A25-54.

Video placement in Health Clubs was new for the brand this year. Jamaica received 2x :30 second video spots per hour on overhead screens throughout a select list of 129 health club locations in NY, NJ and CT (75 bought + 54 added value). Each placement ran across ~4-5 screens per gym. This execution ran for 4 weeks (1/2/17-1/29/17) and delivered 1,977,518 A25-54 impressions. In addition, the brand received an added value program where pre-produced custom :30 spot ran 2x per hour during the same campaign period. The added value program achieved 1,123,254 targeted impressions.

CANADA

Advertising was in market during July 2016 through February 2017. Through the summer months activity consisted primarily of digital media in relevant site placements: weather, travel, programmatic, Facebook & Instagram and paid search. In the fall to winter months, activity consisted of digital (weather, travel, programmatic, Facebook, Instagram and paid search), Television sponsorship with Ottawa Senators and OOH cinema that helped extend reach through the campaign.

All creative used Home of All Right branding with relevant contextual ideas such as "All- You- Can-Discover, All-You-Can-Brave, All-You-Can-Dive, All- You- Can- Jam, All- You- Can- Dance, All- You- Can- Hear, All- You- Can- Feel, All- You- Can-Chill, All- You- Can-Thrill, All- You- Can- Move, All- You- Can- Play, All- You- Can-Imagine, All- You- Can- Explore, All- You- Can- Love and All In One Island.

Digital and /Social

We used the Weather Network in peak season due to “weather obsessed” target engagement. TripAdvisor was used to reach travel intenders and target Caribbean Destination Pages. Using Programmatic helped reach travel intenders on multiple sites.

2016/2017 performance has been the best year to date. Summer and winter campaigns have delivered 18,139,522 impressions, which is 60% over delivered based on planned impressions. In terms of delivered “click through rates” we drove CRTs beyond the industry benchmark. Industry benchmark is 0.05% to 0.12% and Jamaica delivered 0.43% CTR.

While we continued to utilize stand banners and videos, we introduced custom units with the Weather Network that helped with the performance this fiscal year.

In Paid Social, Facebook was a successful reach driver, with large efficiencies average CPCV of on average under \$1. Increase in “click through rates” of 0.88% and high completion rates in both summer and winter campaigns.

Overall delivery in digital was more than 6.4MM Impressions and CTR of 0.93%, which surpass last year benchmark of 0.52%

Paid Search

Overall traffic increased search traffic coming from users looking for Jamaica and other “Jamaica” related search terms. Mobile users showed much stronger intent to click on our ad copy, with overall mobile CTR almost doubling compared to desktop. Overall paid search delivery was more than 2.4MM Impressions and CTR of 2.12%, which surpasses last year benchmark of 1.11%.

Out-of-Home Activity/Cinema

Cinema served as our sole OOH tactic. The showtime campaign delivered an attendance of 3.6MM. We rotated 4 creative units with alternating end tags. In addition, lobby digital screens delivered 500,000 impressions.

Television

Ottawa Senators was our sole Television tactic. The sponsorship included: 30 television spot, rink board, LED domination and online standard banners. An audience of 1MM was reached and delivered just under 300M digital impressions. In addition, we had one night that featured Jamaica and that succeeded in bringing in highly engaged consumers.

UNITED KINGDOM

As has been typical, the UK had a very limited production and media budget in 2016/17, so every activation that took place had to work even harder to compete with Jamaica Tourist Board's competitors and to give consumers a convincing reason to choose Jamaica as their long-haul travel destination.

Print

Most of the activity developed for Jamaica Tourist Board in 2016/17 was executed in print media using the Home of All Right creative campaign. Throughout the year, we reached a different number of key UK audiences through this medium.

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

We continued to target the core couples market with a placement in Wedding Ideas magazine.

We also continued to pursue our sports tour holidays audience with an iteration of the previously created cricket ad, as Jamaica is well-known for its sporting prowess in the UK.

Partnership

We worked with Turtle Bay (a Caribbean restaurant group) to develop table cards, website and menu collateral for an in-store promotion giving Turtle Bay's customers the opportunity to win a holiday to Jamaica. The competition is ongoing but we anticipate it being a success based on last year's results.

We also worked with Expedia to develop and host a landing page on their website. We created traffic driving digital display (MPU, leaderboard, skyscraper and masthead) on the main site to encourage people to visit the landing page.

PUBLIC RELATIONS – THE AMERICAS

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

The following report provides an overview of Finn Partners public relations activities for the period April 2016 – March 2017 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 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 **52** press releases, media alerts and photo caption releases.

- A range of topics were showcased including on-island festivals, events, trade shows and conferences, seasonal travel, holiday packages, product launches, spokespersons, awards and accolades.
- Relevant press releases were translated and distributed to U.S. Hispanic and Latin America media.
- A sampling of these releases include:
 - *Wide Array of Cultural Events Planned for Jamaica in 2017*
 - *Jamaica to Blaze with Color and Excitement During Annual Carnival Season*
 - *Give the Gift of Authentic Jamaican Style & Taste this Holiday Season*
 - *Jamaica Invites Couples to Celebrate Valentine's Day in the Home of All Right*
 - *Enjoy the Diversity of Destination Jamaica's Meeting Offerings*
 - *Jamaica Offers Cyber Monday Deals for 2017 Travel*
 - *New Hotel Developments Boost Jamaica's Room Stock Significantly*
 - *Jamaica Capitalizes on Success of Jamaica House 2016*
 - *Spice Up the Celebration with a Wedding in Jamaica*
 - *Jamaica Shines During Caribbean Week in New York 2016*

Press Trips

The Agency organized **14 Group Press Trips** covering niche areas and supporting JTB-sponsored events such as Reggae Marathon. Niche areas included culinary, music, history, arts and culture, family/multigenerational, blogger outreach, travel trade, Diaspora and more. A sampling of media outlets that were secured for group press trips included the following:

Consumer

Forbes, Matador Network, Boomer Travel Patrol, Macaroni Kid, PopSugar, Health Magazine, GoNOMAD, Uptown Magazine, Daily Burn, MikiAshYoga.com, Huffington Post, Billboard, Canadian Running, Daily News, MSNBC, E! News, Yahoo Music, Buzzfeed, Past Magazine, Sporting News, Business Standard, Los Angeles Times, News America Now, and many more.

Trade

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

The team secured **11 Individual Press Trips**. A sampling of media outlets includes the following: *Forbes, Worldadventurer.com, The Kit, Compact, G98, Brides, The Weekly Gleaner, Montrealer, Ensemble* and more.

Promotions

Arranged over **45 national and regional radio, television, online, and retail promotions**, partnering with airline and on-island hotel and attraction partners, as well as tour operators such as Apple Vacations, Funjet Vacations and Vacation Express. A sampling of promotional media opportunities included the following:

- **30 Radio Promotions including a 10-market live radio remote and promotional campaign** targeting stations in Boston, Philadelphia, Detroit, Baltimore, Cincinnati, and Cleveland
- **Retail:** South Moon Under in-store and online, Luci Lights online, London Jewelers in-store
- **Print:** Best Health, The Kit, Compact, Fiancee
- **TV Broadcast:** The Wendy Williams Show, Steve Harvey Show, Wheel of Fortune, Let's Make a Deal

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:

- Diaspora Media Reception, April 2016
- JHTA Annual General Meeting, May 2016
- Styleweek Jamaica, May 2016
- Caribbean Week New York, June 2016
- Ziggy Marley Summer Tour June – October 2016
- Reggae Sumfest, July 2016
- Jazz Mobile Summer Jazz Concert Series July 2016
- U.S. Open Taste of Tennis, August 2016
- Olympics, August 2016
- Minister and Director Visit Toronto, August 2016
- Prime Minister Town Hall, September 2016
- Taste of Atlanta, October 2016
- One World Ska & Rocksteady, October 2016
- Travel Massive New York, October 2016
- One World Ska & Rocksteady Music Festival, November 2016
- Reggae Marathon, December 2016
- Liguanea Art Festival, December 2016
- Tech Beach Retreat, December 2016
- The Destination Experience, January 2016
- Collection MoDA, November 2016
- One Love Rewards 'White Affair', December 2016
- Rebel Salute, January 2017
- New York Times Travel Show, January 2017
- Travel Massive Toronto, January 2017
- Jamaica Patty Day, February 2017
- Kingston City Run, March 2017
- All-Reggae Bikram Yoga Class in NYC, March 2017

Major Broadcast Initiatives

- *Island Hunter (April 2016)* – Jamaica was the feature destination in a one-hour episode of the new show Island Hunter that was broadcast on NatGeo People and AWETV. The episode highlighted the Falmouth Food Tour, Mystic Mountain, Dunn's River Falls, Dolphin Cove and the Luminous Lagoon. The audience reach was 14 million people.
- *Brazil Travel News (June 2016)* – The Brazilian travel show was in Jamaica for JAPEX and filmed two episodes of the program showcasing the destination's iconic locations of Dunn's River Falls, Devon House, Bob Marley Museum, and others. The audience reach was nearly 2 million.
- *E! News (August 2016)* – The popular entertainment news show featured Jamaica House in Brazil as one of the hot night spots in Rio during the Olympics. E! Entertainment Television is a 24-hour cable television network dedicated to the world of entertainment and has over 78 million subscribers.
- *The Bachelorette Canada (September 2016)* – Jamaica was featured during two 1.5 hour episodes in fall 2016. Six of the Bachelorette's dates were shot on location in Jamaica at attractions such as the Blue Hole, Mystic Mountain, Green Grotto Caves and Tuff Gong Studios. Each episode was watched by approximately eight million viewers and the estimated value of the broadcasts was \$3 million.
- *Steve Harvey Show (November 2016)* – Partnered with Royalton Blue Waters to offer a deserving mother a trip to Jamaica for her good deeds towards a needy co-worker. The show averages 3 million viewers per episode.
- *Let's Make a Deal* – Partnered with Sandy Haven, Foote Prints in the Sand and Holiday Inn Resort Montego Bay to supply trip giveaways. The show's viewership is over 2.7 million. Each episode was valued at \$200,870.
- *Wheel of Fortune* – Partnered with Grand Bahia Principe Jamaica and Holiday Inn Resort Montego Bay to supply trip giveaways. The daily game show is viewed by over 19.2 million people. Each episode was valued at \$161,241.

Social Media

“Escape to Jamaica” Facebook Campaign in Canada (May/June 2016) – Agency ran a Facebook promotion in Canada that included a trip giveaway contest and page likes campaign in partnership with Air Canada Vacations and Sunscape Cove. The contest received over 10,000 unique entries and increased page likes by 22%. The estimated value of the campaign was \$140,000.

Luci Lights #LightupJamaica (August 2016) – Finn Partners secured an eco-focused promotion with MPOWERD, the maker of Luci Lights, a solar powered, portable light. MPOWERD ran a two-week social media contest via Facebook, Twitter and Instagram to reach their 80,000 followers. The agency also assisted MPOWERD with messaging for these posts. The JTB supported the promotion via its social channels as well. The contest resulted in over 2,000 entrants and one participant won Luci Lights and a five-day trip for two to Jakes with airfare and ground transportation provided by the JTB.

Vow Renewal Facebook Campaign in Canada (October 2016) – Agency ran a Facebook promotion in Canada in partnership with Air Canada Vacations and Moon Palace Jamaica Grande. To be eligible, consumers entered their proposal story to be entered to win a romantic vow renewal trip to Jamaica. The contest received almost 500 unique proposal stories during this campaign, reaching an estimated 258,000 people.

Jamaican Patty Day Facebook Promotion in Toronto (February 2017) – To celebrate Jamaican Patty Day in Toronto, the agency ran a week-long Facebook promotion, inviting consumers to enter to win 12 dozen Jamaican patties to host their own Jamaican Patty Party at home. To win, contestants also had to answer a short quiz on Jamaican foods. The promotion reached an audience of over 88,000 and received 463 unique entries.

Dubdub Trip Giveaway Social Media Contest and Event (March 2017) – Finn Partners secured a one-month trip giveaway social contest with Dubdub, a platform that connects brands with influencers. The on-site presence at the event was for the launch of the dubsuite mobile app, which will redefine how influencers are able to create and share video content from their smartphones. One lucky contestant won a trip for two to Jakes Hotel and the JTB provided air support.

Special Events and Projects

Minister Bartlett and Director Pennicook's Visit to NYC (April 5 – 8, 2016)

Finn Partners compiled itineraries for Minister Bartlett and Director Pennicook for their visit to NYC, where they met with key Jamaican stakeholders. The agency coordinated logistics for their meetings throughout the week and drafted photo caption releases from meetings with Flight Centre USA and JetBlue. FP also secured media interviews for the Minister with the following outlets: *Bloomberg Businessweek*, *USA Today*, *The Network Journal*, *Jamaica Information Service* as well as facilitated a radio interview with Irie Jam Radio. The Agency implemented an exclusive Diaspora-focused event at Finn Partners offices that featured remarks by the Minister of Tourism and photo opportunities with up-and-coming Jamaican Chef Andre Fowles of Miss Lily's.

Caribbean Week (June 1 – 6, 2016)

Finn Partners worked with the Caribbean Tourism Organization to secure and organize Jamaica's participation in the week's events. Agency secured "Chopped" Chef Andre from Miss Lily's for the Chef program, including a cooking demo at Bloomingdale's and Rum & Rhythm; recommended journalist Lily Girma for the Marcia Vickery-Wallace Award and Cathleen Decker, president of the Decker Royal Agency for the Marcella Martinez Award, and ordered the awards. The Agency provided on-site support at the following events during the week: Media Marketplace, Caribbean Tourism Awards Luncheon, Reggae spin class at Revolve Studios, Jamaica Happy Hour at Thrillist and Rum & Rhythm.

Jamaica at the 2016 Summer Olympics (August 5 – 21, 2016)

Finn Partners spearheaded the establishment and creation of an Olympics news bureau to ensure timely distribution of press materials and photography, and secure editorial coverage. Finn Partners wrote and distributed five press releases, a photo caption, a Brazilian media briefing document, Jamaica House fact sheet and invitations to the various Olympic Watch Parties and Jamaica House events. Finn Partners was also present at Jamaica House in Rio de Janeiro from August 15-21 to facilitate on-site media interviews with Jamaica Tourist Board officials, managed the photographer and videographer and provided regular updates to the U.S., Canada, Latin America and UK PR teams. Additionally, in support of Jamaica House, Finn Partners organized the National Senior Trials Press Trip (Jamaica), Brazilian Blogger Event (Rio de Janeiro), Trade Event (Rio de Janeiro), Olympic Watch Parties (New York, Fort Lauderdale, Baltimore, Los Angeles, Toronto), #ReggaeRocksBrazil Facebook App (US, UK), Celebrity Influencer appearances to Jamaica House (Rio de Janeiro) and media visits to Jamaica House (Rio de Janeiro). Finn Partners also designed and developed the "Reggae Rocks Brazil" Facebook

app/aggregator that lived on the Jamaica Tourist Board's U.S. and U.K. Facebook pages between August 5 and August 21. The agency created several Facebook Ads to optimize the app by strategically targeting visitors, focusing on the hashtag #ReggaeRocksBrazil, engagement, social community growth, and general awareness of the app. Finn Partners created a content calendar for the JTB social team and tracked social posts by the JTB social team. The total number of media impressions as a result of Finn Partners' work in support of Jamaica House totaled **3,969,057,316**.

#FeelTheVibeJamaica Influencer Campaign (February – March 2017)

With the mission to showcase Jamaica beyond its beautiful beaches, and to inspire potential visitors to Feel The Vibe, Finn Partners developed a 360-degree influencer campaign. The PR Agencies secured seven social media influencers to highlight multifaceted, under-the-radar experiences in Jamaica, sharing it all with the hashtag #FeelTheVibeJamaica. Finn Partners designed the car wrap and coordinated with the printer in Kingston to facilitate the car wrapping. Finn Partners created and delivered the digital ads for the campaign, as well as designed and created the influencer kit. The campaign microsite was created, aggregating content and allowing visitors to book trips to Jamaica. Finn Partners worked with Burson Marsteller, FCB and Initiative to coordinate social media content and advertising schedule. In order to drive more consumers to the microsite for bookings, the agency created social media posts and boosted them on Instagram and Facebook. The Agency also developed SEO (search engine optimization) keywords to drive traffic to the Feel the Vibe microsite. The total reach for #FeelTheVibeJamaica Influencer Campaign is **1,050,447,555** and counting.

Seatrade Cruise Global (March 13-16)

Finn Partners confirmed a series of one-on-one interviews for the Minister of Tourism and Director of Tourism at Seatrade, the leading international exhibition and conference serving the cruise industry, and secured a last-minute opening for a press conference on March 14th. Agency confirmed a photographer for the event, distributed an announcement press release and invited media to the Cruise Jamaica press conference securing 15 media to attend. Additionally, Agency prepared interview media briefing book, suggested talking points and a PowerPoint for the Minister and Director to present at the press conference as well as wrote and distributed a post-Seatrade release.

Written Materials

- Produced, designed and distributed quarterly eNewsletters *Home of All Right* and *Meet You in Jamaica* for travel specialists and MICE markets in the U.S. and Latin America.

- Updated Jamaica press kit materials, April 2016
- Submitted calendar of music festivals in Jamaica to Caribbean Tourism Organization, April 2016
- Submitted media award nominations for CTO Caribbean Media Awards, April 2016
- Drafted script for Highway 2000 North-South Link VNR, April 2016
- Submitted statement and supporting Q&A for Commissioner Williams to deliver at the press conference in Jamaica in response to the incidents involving the two U.S. missionaries, May 2016
- Drafted updated letter for JTB team from Tourism Director regarding the Zika virus, May 2016
- Submitted large group (RDA Association) letter regarding Zika Virus, July 2016
- Drafted a quote for the Director for usage in Sunwing press release in Canada, September 2016
- Submitted JTB statement and suggested media Q&A on St. James crime, September 2016
- Drafted talking points for Rebel Salute NY Press Launch, November 2016
- Prepared remarks on behalf of the Minister of Tourism for White Affair Gala, November 2016
- Prepared Travvy Awards social media post, January 2017
- Drafted talking points for Marcia Sinclair to deliver at New York Times Travel Show, January 2017
- Drafted Director's speech for the JSE Investments and Capital Markets Conference, January 2017
- Submitted activities and images to CTO for Year of Adventure Newsletter, January 2017
- Submitted entry form for FlightNetwork's campaign to rate the best tourism bureaus in the world, February 2017
- Submitted UNWTO Conference presentation and drafted roles/responsibilities, February 2017
- Submitted speaking points and briefing book for Seatrade Cruise Global, March 2017
- Submitted PowerPoint presentation for Cruise Jamaica press conference at Seatrade, March 2017
- Drafted quote on behalf of the Director of Tourism for inclusion in USA Today luxury feature, March 2017
- Drafted Director of Tourism's quotes for inclusion in two Vacation Express charter announcement releases, May 2017
- Drafted social content for Feel the Vibe Influencer Campaign, March 2017

- Drafted speaking points for Director of Tourism's presentation at JTB Events Seminar, March 2017
- Drafted copy for *Our Jamaica Meeting Planner Guide*, on behalf of Director Pennicook

Media Monitoring Reports

- Distributed daily media monitoring report
- Distributed Special Media Monitoring highlighting the news around the two U.S. missionaries, May 2016
- Distributed Special Media & Social Monitoring reports on St. James crime, September 2016
- Distributed Special Media Monitoring reports on Hurricane Matthew, September 2016

Jamaicans Overseas Support

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

Select Placements/Highlights

Bridal

- *Destination Weddings & Honeymoons* – December 2016 – “2017 Honeymoon Hot List”
- *The Knot* – June 1, 2016 – “Hot Honeymoon Destinations”
- *Bridal Guide* – June 12, 2016 – “Your Little White Book”
- *Matador Network* – January 4, 2017 – “12 Compelling reasons to Have Your Wedding in Jamaica”
- *Brides* – March 1, 2017 – “Boozy Honeymoon Destinations for Those in Need of a Post-Wedding Drink”

Culinary

- *USA TODAY* – April 12, 2016 – “Caribbean Fast Food: Where to Stop for Food On the Go”
- *The Daily Meal* – October 24, 2016 – “Jamaica Food and Drink Festival Begins in Kingston on Oct. 26
- *Time Out New York* – November 17, 2016 – “The Best Jamaican Restaurants in NYC”
- *Travel Channel* – March 2, 2017 – “8 Jamaican Dishes and Where to Find Them”

Family

- *Yahoo* – April 20, 2016 – “What You Need to Know About Planning a Family Getaway to Jamaica”
- *Yoga Journal* – April 28, 2016 – “10 Family-Friendly Yoga Vacations”
- *Macaroni Kid* – November 8, 2016 – “Bring the Grandparents Along on Your Family Vacation to Jamaica”
- *Caribbean Travel* – February 25, 2017 – “Experience a Jamaican Oasis Fit For the Entire Family”
- *Traveling Mom* – March 19, 2017 – “Jamaica Resorts Hidden Gem: Melia Braco Village”

General Travel

- *Bravo TV* – May 13, 2016 – “Island Adventure, Real Housewives Style: 5 Reasons to Visit Jamaica's Ocho Rios”
- *Travel + Leisure* – October 26, 2016 – “5 Caribbean Islands Perfect for a Warm-weather Getaway”
- *Forbes* – November 11, 2016 – “Jamaica’s Golf Scene Is On Par With The Island’s Terrific Food, Music and Beaches”
- *New York Times* – January 4, 2017 – “52 Places to Go in 2017”
- *Matador Network* – February 6, 2017 – “12 Photos that Prove Kingston is an Arts & Cultural Hotspot”

Music

- *South Florida Caribbean News* – June 20, 2016 – “Jamaica Tourist Board Sponsors Ziggy Marley 2016 Concert Tour”
- *Yahoo Music* – August 2, 2016 – “As Jamaican Music Goes International, Reggae Sumfest is Taking Back The Culture”
- *Orbitz* – September 19, 2016 – “12 Music-themed Hotels That Hit All the Right Notes”
- *USA TODAY* – December 12, 2016— “Reggae Pilgrimage: Exploring Jamaica’s Musical Gift to the World”
- *Billboard* – January 23, 2017 – “Reggae History Comes Full Circle on Queen Ifrica & Damian Marley Duet ‘Trueversation’: Video Premier”

Sports

- *Yoga Journal* – July 12, 2016 – “10 Spa Vacations for Yogis”
- *Rolling Stone* – August 19, 2016 – “Rio Olympics: What Made Usain Bolt Run”

- *Pop Sugar* – December 27, 2016 – “Proof You Don't Need to Be a Runner to Participate in a 10K”
- *Golfweek* – March 9, 2017 – “Golf, History Provides Perfect Pairing for Jamaican Vacation”

Trade

- *Travel Pulse* – June 15, 2016 – “Bartlett Outlines Pillars For Swift Jamaica Tourism Arrival Growth”
- *Travel Agent* – September 24, 2016 – “What’s New in All-Inclusive Resorts”
- *Travel Weekly* – January 17, 2017 – “Jamaica to host U.N. Conference on Sustainable Tourism”
- *Hotel Management* – March 1, 2017 – “5 Ways Jamaica is Investing for the Future”
- *Prevue Meetings* – May 6, 2017 – “Jamaican Culture Takes the Spotlight at JAPEX”

Canada

- *Calgary Herald* – August 20, 2016 – “Discovering reggae’s roots one a journey to Kingston, Jamaica”
- *Huffington Post Canada* – July 17, 2016 – “The best tropical cocktails to sip this summer”
- *Canadian Travel Press* – November 21, 2016 – “Saying “I do” Made Easy in Jamaica”
- *Toronto Star* – May 5, 2016 – “Hotel Mockingbird Hill is authentically Jamaican”
- *Travel Life Magazine* – January 31, 2017 – “Being a Guest (not a number) at The Cliff Hotel in Negril, Jamaica”

Latin America

- *Economica y Negocios* – May 29, 2016 – “El Reggae Vuelve a Conquistar Kingston”
- *Clarín* – August 30, 2016 – “Jamaica, Caribe al ritmo del reggae y el ron”
- *Entorno Inteligente* – December 9, 2016 – “Parajes románticos en Jamaica”
- *El Nacional* – January 20, 2017 – “Jamaica albergará conferencia mundial de Turismo”
- *El Deber* – February 20, 2017 – “‘Be all right’ en Jamaica”

Other

- *W Magazine* – December 30, 2016 – “Where The Rich and Famous Go to Recover from the Holidays and Reset for the New Year”
- *Daily Burn* – January 9, 2017 – “5 Surprising Benefits of Going Solo on a Wellness Retreat”
- *Yahoo!* – March 23, 2017 – “Vacation Express Brings Dallas Fort Worth Non-Stop Flights to Jamaica this Spring”

Media Impressions

Total media impressions by region are as follows:

- United States: **3,564,370,382**
- Canada: **122,262,382**
- Latin America: **3,428,168,277**
- **Total Impressions: 7,114,801,041**

Total impressions increased over 300% compared to March 2015 to April 2016.

Estimated value is in excess of \$6 million.

PUBLIC RELATIONS – UK / IRELAND

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

Introduction

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

- Marketing/promotional activity
- Press trips (general and themed across key pillars)
- Social media and online activity – management of Facebook, Twitter and Instagram
- Media relations
- Event support and organisation
- Proactive/reactive press office
- Profile building and brand awareness
- Hotels & airlines liaison and partnership
- Event management and promotions
- Crisis management

Highlights from April 2016 – March 2017

293 pieces of media coverage were generated

Social Media

B-M continues to develop JTB's social media presence in the UK market. Additional focus in the period was given to 'influencers' – semi-celebrity Instagrammers that have a lifestyle and travel theme and have a large following – effectively a new media channel.

The Instagram strategy was pursued as the platform is becoming a crucial channel in destination marketing with many millennials actively choosing their holiday destinations as a direct response to images posted and an immediate feedback loop. It also provides the ability to showcase the many facets of the island experience and helps to move perceptions of Jamaica away from 'Fly and Flop' holidays in all inclusive resorts and dispels the myth that it is a dangerous place to visit

Jamaica's Social Media Channels

April 2016

Instagram: 10k
Facebook: 27k
Twitter: 1.8k

31 March, 2017

Instagram: 35.1k
Facebook: 35.3k
Twitter: 2.0k

Growth

251% increase
30.74% increase
11.11% increase

- **Content Calendar:** B-M continued to produce a monthly content calendar, blending stock photography with User Generated Content
- **Twitter:** Promoted Turtle Bay's "Win a holiday to Jamaica" 2016 competition via Twitter (<http://twitter.com/visitjamaicauk>) and other JTB owned social channels.
We also activated a Twitter campaign around Feel The Vibe. This helped to boost our reach and generate more mentions on the page
- **Instagram:** Worked with the JTB to reform and enhance the global Instagram channel. BM worked with both REVOLVE and Irish blogger Anouska on Instagram takeovers and related content across other social channels. This was a huge boost to the channel, with engagements from the influencers driving new audiences to the Visit Jamaica Instagram page. We achieved significant growth over the last year and the Visit Jamaica Instagram page now has 35.1k followers – an increase of 251% from the previous year. (<http://instagram.com/visitjamaica>)
- **Facebook:** Worked with the central team to adopt Facebook Global Pages structure. Executed a Boosted Posts and Follower Acquisition plan on Facebook. Ran an advertising campaign designed to boost ticket sales for the CNT Chef's World Series event. We've grown the UK audience to 35.3k. Our content on Facebook has been seen over 1.3m times through FY16/17. (<http://facebook.com/visitjamaica>)

Key PR Activations

Press/Influencer Trips

B-M continues to deploy a multi-channel approach when inviting media to the island to maximise each trip, combining:

- *Press Trip feature* – online and in print where applicable
- *Social Media amplification* - images on their own personal social channels and their publication's social channels
- *Influencer marketing* – exploiting the rise of the Instagram and vlogger influencer channel

B-M team staffed one of the group press trips.

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

National Seniors Championship

- Shortlist – June/July 2016
- Evening Standard – June/July 2016
- Daily Mail – June/July 2016
- The Times – June/July 2016

Culinary Group Trip – October 2016

- Good Things – October 2016
- MSN UK – October 2016
- 50 Connect – October 2016
- Cosmopolitan.co.uk – October 2016
- Amuse – October 2016

Individual Press Trips

- Daily Telegraph (Sprint capital of the world) – June 2016
- Isabel Conway (Irish Island Links) Freelancer – May 2016
- Fabulous Magazine – May 2016
- Red Magazine – October 2016
- Elle UK – October 2016
- Sunday Times – November 2016
- Suitcase Magazine – September 2016
- The Sun – October 2016
- House of Coco – November 2016
- Family Traveller – October 2016
- GQ/Brides – January 2017
- Woman & Home – January 2017
- Conde Nast Traveller – February 2017

- Escapism – February 2017
- BA High Life – February 2017
- You Magazine – March 2017

Individual Influencer Trips

- Anouska Vlogger – September 2016
- My Green Pod – December 2016

Other influencer Trips

- REVOLVE - Influencer Trip

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

Pitches/Press Releases

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

- Jamaica's best ecotourism attractions and experiences
- Opening of the new North-South link of Highway 2000
- Jamaican Pulse Exhibition
- Reggae Sunfest
- Jamaica Travel Market Sold out announcement
- Press release on Jamaica House Rio announcement
- Holiday packages to Jamaica during the 2016 Olympics
- Promoted Jamaica's cultural heritage through the book In Fine Style: The Dancehall Art of Wilfred Limonious
- New flights to Jamaica from the UK
- Airbnb agreement with JTB
- Press release on JTB White Affair event
- Promoted the Jamaican Patois speaking doll created by Saffron Jackson
- Jamaican market traders receiving training in improving income from tourism
- UK visitor numbers to Jamaica
- Significant growth in visitor numbers from certain regions in the UK to Jamaica

Select Placements/Highlights

Highlights of coverage secured include:

- Conde Nast Traveller – May 01, 2016 – Wild World
- Sunday Express – May 08, 2016 - Red hummingbirds, golden beaches and glowing waters: A walk on Jamaica's wild side

- BA High Life – June 01, 2016 - Island records: Trainspotting author Irvine Welsh discovers Jamaica
- Sunday Business Post – June 12, 2016 - My Jamaica Sigh
- Escapism – July 01, 2016 – One Giant Leap
- Evening Standard – August 04, 2016 - Rio 2016: Inside Jamaica's sprint factory where Usain Bolt perfected his style on a grass track
- Daily Mail – August 03, 2016 – The Making Of Bolt
- Shortlist – August 11, 2016 – Island of the Rocket Men
- The Daily Telegraph – August 12, 2016 - The making of Usain Bolt: From a rugged Jamaican village to Rio Olympics 2016
- Irish Examiner – August 20, 2016 - Blue skies and turquoise waters in Jamaica, the most beautiful islands of the Caribbean
- Vogue Magazine – August 30, 2016 - Jamaican Dancehall Artist Wilfred Limonious Is Finally Having His Moment
- Huffington Post – September 19, 2016 - 10 Exotic Beach Resorts You Probably Haven't Heard Of
- The Sun - October 09, 2016 – Jamaican Us Happy! Glow-in-the-dark lagoons, waterfalls you can climb and endless jerk chicken... How to travel Jamaica
- Daily Express – October 16, 2016 - Kindred countries? Why Jamaica thinks the UK is its Twin
- Good Housekeeping – October 24, 2016 - 19 reasons Jamaica should be your next holiday destination
- Mixmag – November 01, 2016 – The Dancehall Art of Wilfred Limonious
- House of Coco – December 01, 2016 - Jamaica: A tale of two sides
- MSN – January 04, 2017 - Beyond jerk: The ultimate foodie's tour around Jamaica
- Elle – January 01, 2017 - Jamaica Calling
- BBC London – January 21, 2017 - Greenwich mum makes Jamaican Patois-speaking doll
- GQ – January 25, 2017 - What's it like to stay at Goldeneye, The former home of Ian Fleming
- Red Magazine – February 14, 2017 – Escapes
- Good Things Magazine – February 27, 2017 – One Love
- Woman & Home – March 03, 2017 - Woman & Home
- My Green Pod – March 01, 2017 - Jamaica, Jamaica
- Suitcase Magazine – March 24, 2017 - Ocho Rios: Jamaica's Garden Paradise

REVOLVE:

B-M secured a multi-channel digital partnership with REVOLVE, an online luxury clothing retailer, spanning social, digital and traditional media with a reach of 34 million. The objective

was to position Jamaica as a premium destination among millennials using the JTB's existing Instagram channel. The JTB struggled with content creation and lacked aspirational imagery, leaning on stock photography and UGC

Five influential Instagrammers, Sports Illustrated Swimwear cover model Hailey Clauson and REVOLVE shot and launched their latest swimwear line live from the island

Outcome: The influencers drove hundreds of followers to Jamaica's Instagram channel which resulted in 2,000 more followers on Visit Jamaica's Instagram in just ten days. Jamaica was featured on Revolve's homepage and global media coverage that included seven Mail Online features that told Jamaica's premium story

Conde Nast Traveller: Chef Series

BM secured an opportunity for Jamaica to be featured in Conde Nast Traveller Chef's World Series in London. The objective was to position Jamaica's gastronomy as a key consideration for UK holidaymakers.

BM hosted an immersive, luxury dining event featuring the island's best culinary experience at Rudie's – a high-end Jamaican restaurant in London in November

The magazine ran a series of placements about the event positioning Jamaican cuisine as diverse and luxury amongst CNT's avid travelling audience

Outcome: In total, B-M secured four pieces of editorial coverage in Conde Nast Traveller, a luxury travel magazine aimed at the upmarket, independent traveller. This included the following:

- Double page spread promoting event in CNT's November 2016 issue
- Single page feature reviewing event in CNT's January 2017 issue
- Feature on Round Hill in CNT's January 2017 issue
- Feature on Jamaica as a destination in CNT's January 2017 issue

Content was also amplified through social and digital telling the tantalising story of Jamaica's food culture to a large and affluent audience in the UK.

Feel the Vibe Jamaica

B-M worked with the JTB to select influencers to embark on an adventure in Jamaica and encourage their followers to go on their own Jamaica experience. The trip would help increase awareness of brand Jamaica, promote Jamaica's attractions, food and culture, and position the island as an 'epic must do' destination for travellers 25-45.

BM sent two top influencers, Sarah Ashcroft and Ella Dvornik, to visit the island for #FeeltheVibeJamaica while they captured their journey by sharing content to their massive followings via social media, tagging the JTB social channels along the way.

Outcome:

In total, Sarah Ashcroft generated 417,951 engagements across her social channels.

- Instagram: 410,400 likes and 2,765 comments
- Twitter: 262 Retweets and 4,524 comments

In total, Ella Dvornik generated 161,168 engagements across her social channels.

- Instagram: 117,214 likes and 252 comments
- Twitter: 19 retweets and 161 likes
- Facebook: 43,230 likes, 275 comments and 17 shares

Total engagements: 579,199

Country Reputation Management Support

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

- Liaised with JTB
- Edited Jamaica's safety statement for reactive use
- Complete daily monitoring reports combing through stories for any negative sentiment written in articles about Jamaica
- Drafted reactive statements for media around several issues
- Provided client counsel on issues such as Hurricane Matthew and handled UK & Ireland media inquiries in response to the hurricane

Jamaica Travel Market (JTM) 2016

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

- Liaised with JTB regarding focus for JTM
- Created content including press release on new flights to Jamaica from UK along with a press pack
- Developed Minister fact sheet for media including Minister's objectives and pillars of tourism growths
- Developed briefing books for Minister and Director
- Media training with Minister to ensure key messages were conveyed during interviews
- Working beyond travel trades: BBC World, Daily Express and International Business Times interview secured for Minister
- Full media schedule secured for Director and Minister with top travel media at the show
- Worked with partners to curate news update
- Management and staffing support at WTM

Outcome: BM secured 34 pieces of coverage across national and travel media which achieved 5,564,212 total reach.

Other

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

- Staffed World Travel Market 2016 Event alongside JTB. BM supplied JTB with digital press packs to hand out to media at event
- Supported Minister's speech to High Commission in October 2016. BM attended and shared photos from event with Kingston for distribution in local market
- Created country press kits for Irish Holiday shows and delivered kits to JTB London for distribution at show.
- Developed press pack for Travel Biz: Meet the Media event on 27th March
- Supported JTB on promoting joint JTB/Turtle Bay competition across JTB owned social channels
- Attended Tour Operators meeting at JTB London's office and delivered PR update to operators
- Presented plans to hotel partners based in the UK to align on press trips and planning efforts for the year
- Draft a weekly status report on all PR and social elements (ongoing)

SALES ACTIVITIES

USA MARKET SUMMARY

Overview: April 2016 – March 2017

After a record breaking year - 2015 - expectations were once again high for the US market to deliver extraordinary arrivals for 2016.

The ingredients were in place... over 50K additional airline seats for winter 2016

New gateways with non-stop service:

- Hobby Field in Houston
- Los Angeles

Increased service from traditional winter cities

- Minneapolis
- Chicago

The US Team hit the road at the beginning of 2016, connecting with and updating over 1,500 travel agents in all winter markets and continued the pace throughout the remaining three quarters of the year into the first quarter of 2017.

Hotel rooms that were not in service last year were back with new branding and all signs pointed to another record breaking year.

Our **objectives** were to:

- Meet and exceed the target set for visitor arrivals, which we did.
- Increase the membership of the Jamaica Travel Specialist, One Love Rewards Program
- Increase the number of travel agents recording their bookings on the JTS site
- Increase consumer awareness of the destination's product offering
- Target and encourage the Diaspora to vacation in Jamaica
- Attend Honeymoon/Bridal shows to target clients of this recession-proof market
- Use Social Media more effectively and cost efficiently.

To achieve our objectives, the following **strategies** were put in place:

- **Fall/Winter Sales Calls Blitzes.** Blanketed the Northeast and Midwest (winter markets) with sales calls blitzes, with the assistance of supplier partners and tour operators.
- **Spring Blitzes, JTB Seminars and Workshops.** Series of events across the entire US regions
- **Jamaica Travel Specialist, One Love Rewards Program.** This has been a catalyst for measuring and steering travel agent bookings. It also gives the JTB leverage in the

travel market by way of information distribution, motivation and reward and direct on the island learning about the tourism product. The site was re-launched on January 5, 2016 with a more interactive learning portal and a wealth of updated information. At the end of March 2017, the program had over 25,800 enrollees.

The JTS Online store remains very popular as agents look forward to redeeming items based on points earned from recording their bookings on the website.

Our supplier partners also benefit from contributing items for the store. They are able to update agents on their product, through webinars organized by the JTB, email blasts and participating in JTB seminars and sales calls blitzes.

Benefits to the agents include:

- On-island VIP services (airport meet/greet, individual site inspections etc.)
- Monthly award of \$300 to the top-booking Jamaica agent of 10 or more bookings
- A downloadable graduate diploma from Travel Agent University
- A preferred agent listing on the official www.visitJamaica.com website
- Exclusive consultations with JTB Business Development Managers
- VIP familiarization tours
- 50% discount for Club Mobay
- Jamaica's monthly e-Newsletter, which lists deals from across the island for clients to consider.
- Invitation to the 'Annual White Affair Weekend' honoring the top 50-100 top producing Jamaica Travel Specialists.

Jamaica Travel Specialists Online Store

The on-line One Love Rewards store gives agents an extra incentive to book Jamaica vacations. With the rewards store, graduates for the program can shop for a range of items such as accommodations and Jamaica-branded merchandise, using points earned based on the number of clients they send to Jamaica and the cost of the package.

- **Fam Trips** are always very important. We continued the process of educating and updating our agents on Jamaica. The designated Fam Tour months are September and November. However, JTB worked closely with our tour operator partners in organizing fam tours throughout the year.
- **Education/Training** – In-house training of tour operator partners' reservations agents, JTB-hosted seminars/updates, familiarization trips, webinars and presented sponsorship of trade association events, etc.

- **Trade Partner Shows** - Another key element in reaching the travel agent community is through our attendance at shows organized by our trade partners for both travel agents and consumers. For the reporting period, some 22,000 agents were reached through a total of 80 shows. This remains an excellent conduit of reaching the operators' top selling agents.
- **Social Media** remains a high priority in engaging both consumers and trade partners. The emphasis was on content integration with lead generation tactics to deliver travel intending consumers directly to Jamaica Travel Specialists.
- High activity in the **Groups** department with emphasis on highlighting the Montego Bay Convention Center.
- **Zip code analysis** continues to play an important role as we look at where the business is coming from and consider opportunities to grow market share, especially in regions that have the potential to garner additional visitor arrivals.
- Promotional efforts are sustained to reach **consumers** directly through radio promotions using Jamaican artists and Jamaican food demonstrations tied in with major retail outlets; events that showcase Jamaican talent in the fields of music and art as well as a significant presence at major sporting events in key markets.
- The Jamaican **Diaspora** organizations remain very active in many major cities and prove to be very influential in bringing attention to the Destination. The JTB therefore continues to work closely with this niche in showcasing the tourism product by partnering with several organizations in hosting a booth at festivals, concert series, ad placement in souvenir journals, magazine publications, etc.
- Continued expansion in **Latin America** with increased trade activity.

AIRLIFT

With total air seats of approximately two million (2M) over the 12-month period April 2016 through March 2017, the destination was well equipped to deliver passengers in accordance with established targets. This total reflects more than 26,000 additional seats over the prior year.

The Northeast region, our largest source market, gained the most increase in seats followed by the Midwest region that benefitted primarily from charter seats added. Gains on seat capacity in the Northeast resulted primarily from JetBlue's increased capacity into Kingston and Montego Bay, as well as seats added in Philadelphia by American Airlines and in New Jersey by United Airlines. Apple Vacations introduced charter seats from Chicago that gave the biggest boost to the Midwest market for the summer with service May through August.

The southeast lost some seats, mainly from changes in equipment and capacity from Charlotte on American airlines and a similar result in Atlanta with Delta Airlines. Although there were changes in capacity from this region, the frequency remained from major gateways.

The most significant changes in the Western region came from Southwest Airlines introducing new service from Houston. American Airlines also introduced new service from Los Angeles and an increase in seat capacity from Dallas.

The dominant airline partner remains American Airlines with 35% share. The remaining market share is divided among other traditional partners that include JetBlue Airlines, Delta Airlines, and Southwest Airlines that are positioned for increased market share along with United Airlines. Although not holding a significant share, Spirit Airlines continue to deliver stable performance with potential for increase.

Overall, the destination has achieved decent load factors and all airline partners are happy with not only loads but revenue on routes serving Jamaica. We have utilized opportunities to work with the partners in assessing performance and continue to look for ways to increase load factors and service from major gateways as well as new and underserved gateways.

Activities Highlights Overview – April 2016 – March 2017

JTB Product Update

During the reporting period, the Jamaica Tourist Board USA conducted a series of seminars, sales call blitzes, joint sales call with supplier partners and training of reservation agents at tour operator call centers.

A total of 172 activations were completed. This resulted in over 2,845 agents attending JTB seminars; 1,167 agencies were visited during sales calls blitzes and 2,569 reservation agents were updated on the product.

Media Relations

Jamaica Travel Agent Training Webinars Series

Bi-weekly webinars hosted by JTB, our supplier partners and tours operators were conducted throughout the fiscal year to inform our Jamaica Travel Specialists on how their clients can get the most out of their vacation experiences and how they, the agents can maximize their rewards for recording their bookings.

A total of 15 webinars were completed during the reporting period, averaging an attendance of 266 travel agents per seminar. Incentives offered during the sessions usually result in peaked interest by the travel agents. Two of these webinars were very well subscribed with participation of 366 participants and the other 559 participants.

Presentations were conducted by the following partners:

Hotels/Resorts	Reservation Centers	Attractions	Tour Operators
Iberostar Hotels	Travel Impressions	Club Mobay	Exclusive Group Travel
Royalton Resorts	GoGo Vacations	Mystic Mountain	Vacation Express
RIU Resorts	AAA	Konoko Falls	GoGo Vacations
Jewel Resorts			Funjet Vacations
Melia Braco			Mark Travel
Karisma			Delta Vacations
			Delta Airlines
			AA Vacations
			Apple Vacations

OneLoveAgents.com – Jamaica Travel Specialist Webpage

Launched in July 2016, this is one of our newest digital marketing tools, designed specifically with our Jamaica Travel Specialists in mind, as we continue to seek ways to strengthen the relationship with our most valuable partners in the promotion of Destination Jamaica.

This webpage will serve as an additional resource to, among other things:

- Inform agents of all JTB related trade and promotional activities in all regions of the United States, including seminars, tradeshow, workshops, fam trips, webinars, etc.;
- Keep agents updated on the Jamaica product, including new hotels, resorts, attractions, restaurants as they open, are renovated, expanded or rebranded;
- Guide agents on how to keep in touch with our Team Members both in our corporate offices and in the field, as well as access services provided by the JTB for them;
- Alert agents to anything we think may be of interest to them and their clients to maximize the Jamaica vacation experience.

“One Love Vibes” Newsletter

Distributed to agents twice monthly, the eNewsletter updates agents on product developments, product partners’ offers and incentives and BDM activities pertaining to Jamaica Travel Specialists.

The eNewsletter has an average monthly open rate of 31%.
(Industry average: 21.8%)

The eNewsletter has an average monthly click rate of 24%.
(Industry Average: 6.7%)

Fam Trips

Twenty-five fam trip rotations were completed and over 250 travel agents were updated on the product. Our targeted number of agents was below expectation however, the travel agent community received full updates on the island through our many other methods of communication.

One of the reasons cited by agents for not being able to participate in fam trips in 2016 is that they had participated in independent site inspections organized by the Board while on personal visit to the island. These Independent site inspections by agents are becoming increasingly popular. Our office works closely with the JTB Montego Bay office in the execution and the agents are very pleased with the arrangements.

Trade Shows

Continued partnership with our trade partners at their product launch events gave JTB representatives the opportunity to attend some 180 shows where over 37,700 agents attended. Agents were updated on the product offering.

Consumer Shows

With the advancement of technology, clients are now able to conduct their full research on potential travel spots, and can therefore inform their travel consultants on the destinations they are considering. JTB's participation at consumer shows therefore remains a priority. During this reporting period, JTB was present at over 80 festivals, concerts, etc. where we were able to inform some 350,000 potential visitors why Jamaica is the preferred Caribbean destination to enjoy a vacation.

Bridal Shows

This recession-proof market remains one of our most targeted niches. The JTB team attended over 18 major bridal shows and networked with some 19,000 brides. Brides and grooms are seeking to have a more experiential stay at their chosen destination so sharing information on 'things to do' has become an important element when interacting with this important and informed clientele.

Diaspora Events

Continued outreach to our Diaspora community resulted in the Board's participation at some 29 Diaspora events. We were given the opportunity to encourage over 30,000 individuals to vacation at home and also to be ambassadors at their place of employment, in getting their co-workers to experience Jamaica also.

Sporting Events

JTB participated in several sporting activities through the year - the Annual Penn Relays, golfing events and partnership with Reggae Marathon at three major events in the Northeast,

Southeast and Southwest. Over 140,000 sports enthusiasts were informed of sporting events in Jamaica and general information on vacationing in Jamaica.

Groups and Conventions

The Groups and Conventions Department continued their efforts to keep Jamaica as the preferred Caribbean destination for MICE travel. This resulted in our participation at some 8 events where over 3,212 meeting planners were provided with information on our meetings facilities.

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

LATIN AMERICA

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

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

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

During the 2016/2017 (April-March) fiscal year, the JTB Latin America team was engaged in actively promoting the destination across the region. In addition to our ongoing sales calls to tour operators and travel agents in each of the key markets, we conducted a series of targeted events that included breakfasts, FAM trips, trainings, seminars and sales missions.

Confronting this activity were several challenges, including:

- Extremely high airfares pricing us out of the market
- Recession across the region
- Political change in the U.S. causing uncertainty, especially in Mexico
- Political and economic challenges lowering consumer confidence
- Very dense competitive landscape with aggressive players

Despite the many challenges, we used the period to continue strengthening our relationships with the trade and forging the foundations for broader and stronger partnerships. Some of the past fiscal year's successes included:

- Successful trade event at Jamaica House at the Rio Olympics
- A greater focus on partnerships with hotels and airlines
- Increased co-op activity with key TOs and first time trade advertising campaign and successful sales missions across key markets

Activity Metrics for the region during the April 2016 - March 2017 period included:

	EVENTS	ATTENDEES
BREAKFAST EVENTS & SALES MISSIONS	12	867
TRADESHOWS	6	5750
FAM TRIPS	5	37
IN-OFFICE TRAININGS	50	435

CANADA

In 2016, for the eleventh consecutive year, the Jamaica Tourist Board's Canadian operation was honored with the coveted Agents' Choice Award for the Favourite Tourist Board in Canada. This is as a result of the impact of the team in the marketplace despite the limited resources.

Meetings and Incentive Travel Magazine's 2016 Incentive Travel Survey revealed that Jamaica was ranked the top Caribbean destination for Canadian meeting planners. Sixty-two percent of Canadian planners booked groups to Jamaica over other Caribbean destinations in 2016. Sixty-nine percent of all survey respondents booked a Caribbean meeting and of this group, 62% booked groups to Jamaica over other Caribbean destinations such as the Bahamas – 24%, Aruba – 19% and Barbados – 19%. The respondents sourced destinations mostly by word of mouth (71%), but also on the destination's website (68%) and at trade shows (61%).

The Canadian market is showing signs of recovery. This is largely due to the following:

- 1) Acceptance by the consumers that the current economic landscape is our new reality.
- 2) Aggressive B2C and B2B marketing efforts by the JTB and its partners.

Activities Overview

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 13 of the top 50 selling Jamaica Travel Specialists for 2016.
- We participated in over 70 trade shows and engaged over 20,000 retail travel professionals directly.
- Fam trips are still very effective. Agents sell what they have experienced. We hosted 370 travel agents on 12 fam tours.
- We engaged over 20,000 travel agents through the first edition of our new and very popular "The Jamaican", a seasonal destination update newsletter.
- We continue to utilize social media to increase our interaction with trade and consumers.

Airlines/Tour Operators

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

Consumer Direct

- We participated in over 52 consumer shows and directly engaged approximately 3 million consumers.
- Interacted with over 60,000 future brides at wedding shows across Canada. This has helped to increase our summer business.
- Conducted a series of social media promotions that engaged 7.5 million consumers.

Diaspora

Participated in 6 diaspora initiatives across Canada with a direct reach of 35,000 diaspora members.

The Olympic Watch Party held in Toronto on August 14, 2016, for the Rio Olympics was a success. Over 250 members of the diaspora attended and social media interaction reached over 100,000.

UNITED KINGDOM

During 2016-17, the JTB London office was again actively involved in numerous consumer shows, trade shows and other events including the activities and promotions as summarised below.

Fam trips	6 Fam Trips	<p>47 Travel agents were hosted across five fam trip visits.</p> <p>Five of the participants were top sellers from our Jamaica Rewards who attended “The White Affair” at The Hilton Montego Bay. 6 participants were on the British Airways top Caribbean Specialist fam as guests of British Airways to celebrate 70th years flying to Jamaica; 18 were Luxury specialist sellers’ part of the launch of Jamaica Luxury and 18 were Jamaica Travel Specialists on regular destination updates.</p>
Trade Seminars	54 events	<p>Over 3,500 travel agents and wholesale staff across the UK, Ireland & Scandinavia were updated on destination Jamaica in the reporting period. With continued direct flights from Scandinavia (although reduced) and new departures from Dublin, Glasgow and London Stansted as well increased capacity from London and Manchester, activity has been increased to ensure their trade awareness across all markets.</p> <p>The team participated in significantly more activity across the Nordic region in preparation for more independent travellers as airlift is cut. In the UK, the relationship with all key partners has been bolstered with activations at key reservations and call centre sites, as well as regular sales calls and retail staff promotional events.</p> <p>During the reporting period two new initiatives were launched with the JAMAICA LUXURY marketing cluster, which hosted two seminars in both London and Chester. In addition, the first ever Romance Week was completed, where webinars and niche trade seminars were conducted in the northern and southern regions. The seminars and blitzes were arranged as part of the sales teams’ ongoing engagement with the retail trade and saw us reaching over 500 more agents and sellers in this 12 month period.</p>

Trade Shows	11 events	<p>245,000 visitors.</p> <p>The Wedding Show, London - April 2016</p> <p>The Northern Travel Ball, Manchester - September 2016</p> <p>Jamaica Travel Market Sept 2016 (JTB's own trade show)</p> <p>Quality Travel Fair, Copenhagen - October 2016</p> <p>World Travel Market, London - Nov 2016</p> <p>Travel Counsellors Conference - Manchester November 2016</p> <p>The Telegraph Cruise and Travel Show, London - January 2017</p> <p>The Holiday Show, Dublin, Ireland - Jan 2017</p> <p>The Holiday World, Belfast - Jan 2017</p> <p>Heart Wedding Showcase - Feb 2017</p> <p>Unite Caribbean, London - March 2017</p>
Tour Operator Launches	1 event	<p>Thomson is the UK's largest tour operator with a tour operator division and retail travel agency subsidiary located in Ireland. Throughout 2014 – 2016, we worked to launch the first direct flight from Dublin to Montego Bay and continued to work closely with their Irish operation as a preferred destination partner.</p>
Product Launches	None	
Sales Calls	440	<p>Regular blitzes across all the key UK cities, both in the North and the South took place during 2016-17. These have been characterized by a significant concentration of activity around the use of the Jamaica Rewards portal to target agents/sellers and develop stronger relationships with top retail sellers.</p> <p>Having our new UK Business Development Officer trained up on the road allowed us to continue with more sales calls and Jamaica events to include "Men in Shorts" national roadshow, Romance week, Homeworker agency events to include sales blitzes to areas that had not been covered for some time. Hence the increased number of sales calls over this period. Regions such as The Channel Islands, Scotland and Wales were given a greater degree of attention.</p>

EUROPE (East, West, Central & Southern Europe)

The German speaking markets of Germany, Switzerland and Austria (DACH) grew an average 10% where the load factors on shared flights with Cuba reflected a swing away from Cuba to benefit of Jamaica. Italy continued its strong growth with the introduction of an additional NEOS flight from Dec. 25 – Mar.19 from Verona, in addition to flights out of Milan. Growth was 24% with 13,232 arrivals in the fiscal year.

Spain grew by a modest 3% but outlook is strong with consistent economic growth over the last two years placing Spain as the fastest growing economy in the EU at GDP growth of over 3%.

The Netherlands recorded a modest increase of 4% over previous fiscal year with 7,072 arrivals, due mainly to limited air capacity on the weekly shared flight on TUI NL.

Belgium had an increase of 13% as they maintained their shared bi-weekly flights year round with the most competitive prices from the EU to Jamaica. Arrivals totalled 6,030.

Poland was the 'crowning glory', growing 230% over previous fiscal year all due to the new TUI PL flight which operated between Nov. and Mar. The arrivals from Poland were 4,309.

France with strong potential performed much better than the year prior due to increased tour operator co-op activity as well as very competitive fares offered by DELTA via ATL. Arrivals from France were 5,871, a growth of 17% over previous fiscal year.

Russia has stabilized in the fiscal year but continues to be affected by the lack of direct air service.

The Czech Republic remains flat in arrivals due to a lack of convenient air service and competitive rates.

Growth from the top producing eleven Continental European countries mentioned averaged 17%

Monthly press releases were carried out as per contractual agreement by our four Representation offices in Europe in addition to their involvement in coordinating the following:

Advertising was effected mainly through coop support with tour operator partners. Focus was on online activities such as banners, micro Jamaica sites, landing/home-page, E-Newsletters, Google Adword and social media advertising. Other activities included, window displays, travel agents workshops, roadshows and Jamaica presentations during the launch, in particular, of Winter brochures. Over 44 such activities were done with some of our main partners including FTI - Switzerland, France and Germany; Thomas Cook/Neckermann – Poland and Germany; Press Tours in Italy, as well as with TUI - Belgium, France, Holland, Poland and Germany; Maison des Etats Unis and Karavel in France; Eso and Fischer in the Czech Republic; Soltour and Logitravel in Spain; Kolumbus in Latvia; Tenzing Travel and Explore Jamaica in Holland; Amazing Destinations in Belgium and Medipus, Der Touristik and Air Berlin in Germany.

Strong visibility in the German speaking markets occurred as a result of the DSDS (Germany's version of American Idol) which aired in March and one week in April 2016. DSDS aired in DACH as well as the Netherlands (5 episodes) with full feature on Jamaica aired twice weekly with an average viewership of 3 million. This translated to a surge in bookings for Winter from the DACH region.

Filming of 'The Bachelor' series by one of Germany's main television stations, RTL, took place in Jamaica in November 2016. With a market share of EUR 3.6 million, viewing of the 'Jamaica' series ran from March to April 2017.

Also, TV 3OPS Reis of the Netherlands filmed in Jamaica in 28 April – May 6 and aired three 30 minute episodes of their popular travel program between October – February.

We have participated in more than 22 major trade and consumer shows across Europe including Top Resa and ILTM in France; TTG, BMT and No Frills in Italy; Vien Ferien Messe in Austria, CMT, FREE and ITB in Germany; FITUR in Spain; Vakantiebeurs-NH, Vakantiebeurs Limburg, Vakantiebeurs Utrecht and Vakantiebeurs Midden Brabant in Holland; Vakantiesalon in Belgium, as well as Luxury Travel Market and Holiday World in the Czech Republic and the Luxury Travel Market in Poland.

The JTB maintained its presence in the Baltic region by participating once more in the TTR Baltic Roadshow involving all 3 Baltic States (Latvia, Lithuania and Estonia). Additionally, a mini European roadshow put on by the JTB was held in February 2017 covering the cities of Milan, Madrid, Frankfurt, Munich and Cologne. Over 500 agents participated.

We participated in 80 promotional events across the continent and provided financial support in some of these events which generated publicity for the destination. ‘Top UP Dancehall Camp’ held in Berlin, Germany, is one such event which attracted over 200 participants with dancers from Jamaica leading dance seminars.

Collaboration with Online Travel Agencies such as Holiday Check and Expedia played a major role in promoting the destination.

Nine (9) familiarization tours and 12 press visits from both key and emerging markets were also carried out.

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)
		**	Grafenstein Freizeit-und-Tourismuswerbung GmbH
▪	Spain & Portugal	-	Sergat Espana (Marc Meister)
		**	Interface Tourism Spain
▪	Italy	-	Brian Hammond Associates
		**	Interface Tourism Italy
▪	Holland)		
	Netherlands)	-	Hans van Wamel/Color Travel Services
	Belgium)		
▪	Japan	-	Fourth Valley Concierge Corporation
▪	India	-	TRAC Representation (India) Private Ltd.
▪	China	-	China Business Network

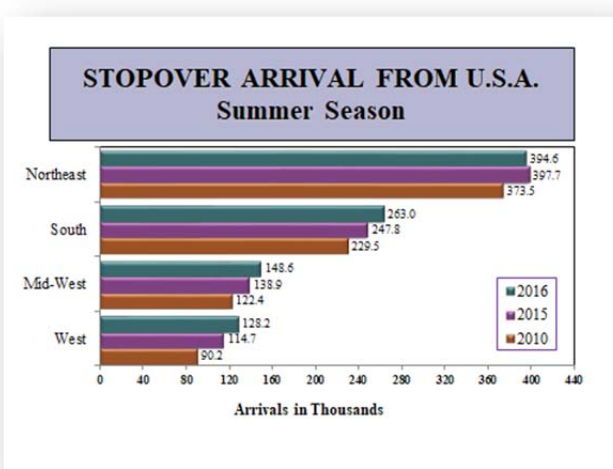
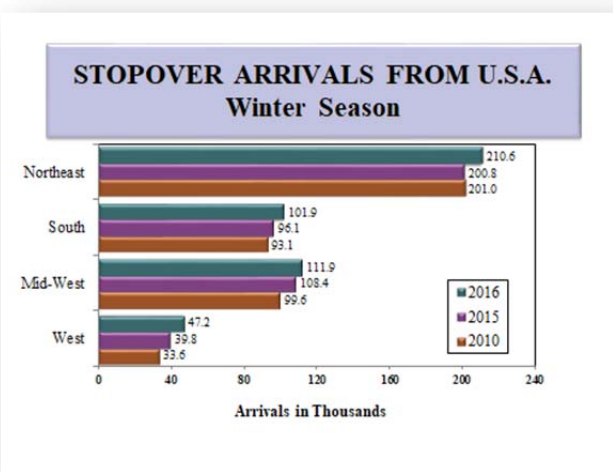
A review of the European Marketing Representation agencies commenced in 2015 resulting in a procurement process being undertaken in 2016. At the end of this activity, there was a change of agencies as indicated by ** above. Hans van Wamel/Color Travel Services retained the account for Holland/Netherlands/Belgium. The new two-year contracts for all four agencies will run from August 1, 2016 to July 31, 2018.

PERFORMANCE IN THE MARKETPLACE

UNITED STATES

The U.S. economy grew by 1.6 percent in 2016 (that is, from the 2015 annual level to the 2016 annual level), compared with an increase of 2.6 percent in 2015.¹ Travel by 31.8 million US citizens during January and November 2016 to overseas regions indicates that outbound travel from the USA increased by 8.0% over outbound travel during the corresponding period in 2015. Travel to the Caribbean region increased by 2.0% during this period also, reflecting a market share of 22.2% of the USA outbound travel market. Of the 72.6 million total outbound travelers for 2016, 40.7 million traveled to Canada and Mexico.²

Pertaining to Jamaica, during the winter season (Jan. – Apr.), stopover arrivals in 2016 were 5.9% higher than those in 2015 and 10.4% higher than in 2010. In comparison to 2015, stopover arrivals in the 2016 winter season from the Northeastern and Southern regions increased by 4.9 and 6.0% respectively. The Western and Midwestern regions of the U.S. grew during this period by 18.6 and 3.2% respectively.



¹ Bureau of Economic Analysis, U.S Department of Commerce - News Release – April, 2017

² U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries “U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico July 2017”

For the summer period (May – Dec.), the US market grew by 3.9% compared to 2015 and rose 14.6% over 2010 stopover arrivals. Summer arrivals in 2016 were 934,487. In 2015, 899,044 stopover arrivals came during summer and in 2010, 815,623 stopover arrivals visited. The strongest growth was recorded in the Western region, with 128,186 arrivals up 15.3%, followed by the Midwest region with 148,648 arrivals, up 7.1%. The South region, recorded 263,031 arrivals up 6.1% and the Northeast region, where the most US arrivals originate from, recorded a decline in arrivals of 0.8% with 394,622 arrivals.

The Northeastern and Southern regions contributed 69.0% of the US stopover visitors to Jamaica during 2016. This represents 3.2 percentage points less than its 72.2% contribution in 2010. The Midwest region contributed 18.5% of the stopover arrivals and the remaining 12.5% of the stopover visitors came from the Western region. The Northeast market region with 605,144 arrivals increased by 1.1%, the South with 364,974 arrivals increased by 6.1%, the Midwest with 260,587 grew by 5.4% and the Western region with 175,353 increased by 13.5%. Overall, arrivals from the USA market increased 4.6 in 2016 with 1,406,058 over the 1,344,149 stopovers in 2015. This performance was 8.5% more arrivals than the 1,296,457 arrivals recorded in 2014 and 10.6% more than the 1,271,262 in 2013.

USA Visitor Summary

- The average length of stay for Foreign Nationals US visitors in 2016 was 7.6 nights, which is lower than the average of 8.8 nights for all visitors.
- In 2016 a total of 1,051,922 or 74.8% of US visitors came to Jamaica for leisure, recreation and holiday, 227,905 or 16.2% came to visit friends & relatives, 47,511 or 3.4% on business and 78,720 or 5.6% for other or unstated purposes.
- The annual average growth rate for visitors from the USA over the past five years from 2012 to 2016 was 2.8%.
- In 2016 the age distribution of US stopover visitors indicated that 10.7% were aged less than 18 years, 6.9% were between 18 and 24 years, 48.6% were between 25 and 49 years, 25.1% were between 50 and 64 years and 8.7% were over 64 years.
- The Gender mix of visitors from USA, were 620,014 males (44.1%) and 786,044 females (55.9%). The gender ratio of visitors from the USA is 127 females per 100 males.
- The peak periods of US stopover visitors to Jamaica in 2016 were: Summer (June – July), Easter (March) and Christmas (December). The months with the highest numbers of

stopover arrivals in 2016, in descending order, were: July, June, December and March. This pattern has been holding strong for the past three years (2014 – 2016).

- The most popular resort region to which US stopover visitors stayed in 2016 was Montego Bay with 501,398 or 35.6% of US visitors. 22.2% or 313,221 of the US visitors stayed in Ocho Rios and 18.5% or 260,030 stayed in Negril.

CANADA

Canada's economic activity grew by 1.3% in 2016 after slowdown of 0.9% in 2015³. Outbound trips reached an estimated 31.288 million in 2016⁴. Arrivals from Canada in 2016 totaled 373,137 representing 19,272 less Canadian visitors to Jamaica than in 2015, a 4.9% decrease.

The Canadian market fell during the (January – April), winter period, decreasing by 11.6%. During this period a total of 162,847 stopovers came from that market compared to 184,237 in winter 2015. This is below the record number of 211,925 that came in winter of 2012, and is 26,142 less visitors. All the months of winter recorded decreases: January (-11.5%), February (-9.8%), March (-17.7%) and April (-6.3%).

This negative trend reversed itself by the end of the summer period (May – December), with a total of 209,290 stopovers arrivals, to recorded a growth of 1.0% compared to the 207,172 arrivals in summer of 2015. The months of June and August were the only months during the summer period to record declines in arrivals, (-6.2%) and (-3.9%) respectively.

The main province of Ontario contributed 255,142 or 68.6% to the Canadian stopover arrival total, which was a decrease of 2.6% over the 261859 who came from that province in 2015. Quebec, the second leading visitor producing province, (with 11.4% of the visitors), produced 13.3% less stopovers. The other two leading provinces, Alberta declined by 10.7%, and British Columbia increased by 5.2% in 2016 compared to 2015.

³ Statistics Canada, Industry Accounts Division (May 2017). Canadian Economic Accounts Quarterly Review.

⁴ Canadian Tourism Commission (December 2016). Tourism Snapshot: A Monthly Monitor of the Performance of Canada's Tourism Industry Vol, 12, Issue 12

Canada Visitor Summary

- The average length of stay for Foreign National Canadian visitors in 2016 was 9.0 nights.
- In 2016 a total of 300,959 or 80.9% of Canadian visitors came to Jamaica for leisure, recreation and holiday, 50,415 or 13.5% came to visit friends & relatives, 7,748 or 2.1% came on business, and 13,015 or 3.5% came for other or unstated purposes.
- The annual average growth rate for visitors from the Canada region over the past five years from 2012 to 2016 was -2.0%.
- In 2016 the age distribution shows 13.3% were aged under 18 years, 6.0% were between 18 – 24 years, 44.6% were between 25 – 49 years, 27.0% were between 50 – 64 years and 9.1% were 65 and over.
- The Gender mix of visitors from Canada, were 170,082 males (45.7%) and 202,055 females (54.3%). The gender ratio of visitors from Canada is 119 females per 100 males.
- January through March and December are the peak months for visitor arrivals from Canada in 2016. This coincides with the cold winter climate experienced in Canada during this period
- The most popular resort regions to which Canadian visitors stayed in 2016 was Montego Bay with a total of 121,133 or 32.6% of Canadian visitors. 30.6% or 113,987 Canadian visitors stayed in Ocho Rios and another 19.8% or 73,628 stayed in Negril.

United Kingdom/Europe

The number of visits abroad by UK residents grew by 7.7% in 2016 from 65.4 million in 2015 to 70.4 million. This growth occurred in relation to visits to North America which grew by 5.6%, Europe grew by 8.8%, while visit to and Other Countries grew by 3.0%.⁵

Stopover arrivals to Jamaica out of the European region recorded positive growth in 2016. Arrivals from Europe increased by 6.0% in 2016, moving from 261,081 arrivals in 2014 to 279,332 arrivals in 2016. The United Kingdom, Germany, Italy and Sweden are the most important visitor producing countries within this regional market, in descending order of importance.

⁵ UK National Statistics – Travel Trends -2016, April 2017

United Kingdom Visitor Summary

- The United Kingdom, with 199,002 stopover arrivals, registered an increase of 12.3% over the 177,216 recorded in 2014. This is higher than the previous record level of visitors from the UK in 2008 when 188,436 were registered. The performance for winter was up by 27.5%, this trend continued in the summer with a lower level of increases to end the season with a 6.6%.
- The average length of stay for Foreign National UK visitors in 2016 was 15.3 nights, which is higher than the average of 8.8 nights for all visitors.
- In 2016 a total of 129,752 or 61.8% of UK visitors visited Jamaica for leisure, recreation and holiday, 54,466 or 25.9% visited friends & relatives, 11,559 or 5.5% came on business, and 14,326 or 6.8% visited for other or unstated purposes.
- The annual average growth rate for visitors from the United Kingdom over the past five years from 2012 to 2016 was positive 9.2%.
- In 2016 the age distribution shows 12.9% were aged under 18 years, 6.8% were between 18 – 24 years, 41.0% were between 25 – 49 years, 29.4% were between 50 – 64 years and 9.9% were 65 and over.
- The Gender mix of visitors from UK, were 93,731 males (45.4%) and 112,739 females (54.3%). The gender ratio of visitors from the United Kingdom is 120 females per 100 males.
- July, August and December were the peak months for visitor arrivals from UK in 2016 with July being the highest month with 20,100 visitors.

Continental Europe

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 20,768 stopover arrivals in 2016, the German market grew by 1.2% over the 20,528 recorded in 2015. This is 50.3% below the peak of 43,018 German visitors recorded in 1998.

During 2016 Italy was the second main visitor producing country from Continental Europe with 12,893 arrivals, which was a growth of 36.0%; however this was below the 29,187 Italian arrivals recorded in 1992.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway and Sweden) represents 76.9 per cent of the total European market and contributed an additional 10,670 arrivals to the European total in 2016.

The performances of the following European countries, albeit small numbers, recorded mixed growth in 2016 compared to the corresponding period in 2015;

- | | | |
|------------------|-----------------|-------------------------|
| ■ Ireland 53.8%; | ■ Norway 36.4%; | ■ The Netherlands 1.0%; |
| ■ Sweden 21.3%; | ■ Spain 13.1%. | ■ Switzerland 3.8%; |
| ■ Belgium 12.7%; | ■ Poland 86.3%; | ■ France 4.6%. |

Latin America

Latin America continues to be a market which holds much potential for Jamaica. However, stopover arrivals out of the Latin American market region declined by 5.7%, moving down from 29,387 in 2015 to 27,726 in 2016 and 9.2% lower than in 2013 when the highest number of 30,538 arrivals were recorded.

Of the top three visitor-producing countries in the South American sub-region, Chile with 4,350 visitors fell by 18.7%; Argentina with 3,269 visitors decreased by 4.7% and Brazil with 2,782 decreased by 14.4%;

From the Central American sub-region, Mexico with 4,569 visitors increased by 5.0%; Costa Rica with 2,319 increased by 78.5% and Panama with 1,740 decreased by 18.7%;

Caribbean

Arrivals from Caribbean territories to Jamaica increased in 2016. Jamaica welcomed 65,592 arrivals from this market, which is 1,639 less arrivals than the 67,231 Caribbean nationals who visited Jamaica in 2008, but it is a 4.8% increase over the 62,612 who visited in 2015.

The Cayman Islands, with 17,625 stopovers, Trinidad and Tobago with 11,399, The Bahamas with 6,037, Barbados with 4,614, and The Turks & Caicos Islands with 3,506 arrivals continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 38,567 stopovers or 58.8% of the total Caribbean arrivals.

Other Countries

China, Australia, Japan and India are the main visitor producing countries from other parts of the World. When compared to 2015, China with 3,899 grew by 4.1%, Australia, with 2,692 stopovers fell by 10.2%, Japan with 1,842 was down by 14.9% and India, with 1,721, fell by 6.1%.

CRUISE PASSENGERS

According to the Florida-Caribbean Cruise Association (FCCA), 24.2 million passengers sailed the oceans on FCCA and/or CLIA Member Lines in 2016, up 4.3% from the 23.2 million passengers in 2015. In 2016 the growth of the cruise industry continued with nine new innovative, feature-rich ocean going vessels, totalling 23,000 lower berths and an investment of more than US\$5.5 billion.

The current cruise ship order book extending through 2023 includes 42 new builds, with over 165,000 berths at a value of over US\$36 billion.⁶

Today's cruise ships offer a world of innovations that align with cruise lines' brands from sky-diving simulators and robotic bartenders to celebrity chef kitchens and all-suite staterooms and facilities that accommodate family members of all generations traveling together or passengers cruising solo. Cruise ships' facilities and services continue to exceed the expectations of a growing population of travelers, and cruisers can easily find a cruise brand, ship, stateroom and itinerary to suit them. The Cruise lines have also offered their guests new cruise themes and voyage lengths to meet the changing vacation patterns of today's traveler.

The Caribbean continues to lead as the number one cruise destination, accounting for more than a third (33.7%) of the entire global deployment capacity market share. The passenger numbers for the Caribbean continues to be consistent and high, despite other rising cruise destinations.

Jamaica recorded a growth in cruise passengers during 2016. This total of 1,655,565 cruise passengers who visited our shores was a 5.5% increase over the 1,568,702 recorded for the corresponding period in 2015. It was also 23.8%, or 318,571 passengers ahead of the record year 2006, when 1,336,994 cruise passengers visited our shores. Seasonally, cruise arrivals recorded an increase of 13.8% in the winter period (January to April) with 745,220 cruise passengers, up from the 654,565 for 2015. During the summer period (May to December), with the exception of the months of July and December, which recorded declines of 12.1% and 20.1% respectively, every other month recorded increases in cruise passenger arrivals, ranging from as low as 2.9% in October to 23.5% in June. For this summer period 910,345 cruise

⁶ Source: Florida-Caribbean Cruise Association – Cruise Industry Overview 2017

passengers visited Jamaica, which was slightly lower 0.4% from 262 ship calls, compared to 914,138 passengers and 247 ship calls in 2015.

The port of Falmouth contributed 707,886 cruise ship passengers or 42.8% of total passengers to Jamaica from 160 cruise ship calls.

The port of Ocho Rios, which in the past provided the largest share of Jamaica's cruise arrivals, accounted for 491,506 or 29.7% of the 1,655,565 who arrived at our shores in 2016.

The port of Montego Bay accounted for 453,566 passengers or 27.4%.

The cruise ships carrying the most passengers to Jamaica in 2016 were all from the Royal Caribbean Cruise family of ships, the *Oasis of the Seas*, *Allure of the Seas*, and *Liberty of the Seas*, all calling to the Port of Falmouth. The *Oasis of the Seas* made 24 calls with 147,322 passengers. The *Allure of the Seas* made 21 cruise ship calls with 128,555 cruise passengers and the *Liberty of the Seas* also made 21 cruise ship calls and provided 89,277 passengers. The combined total of 365,154 cruise passengers from these three ships represents 22.1% of Jamaica's total cruise passenger market.

JAMAICA

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

The Marketing Department

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

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

Press Outreach:

A total of Six Hundred and Eighteen (618) press releases, pitches and articles were distributed through our representative agencies in Germany, India, China, Japan, North America, Latin America, and UK/Europe. The releases were shared with media houses and freelance journalists in order to generate coverage.

- 2016 April – June: 142 *press outreach* *BM 70 Finn 72*
- 2016 July – September: 164 *press outreach* *BM 82 Finn 82*
- 2016 October – December: 152 *press outreach* *BM 64 Finn 88*
- 2017 January – March: 160 *press outreach* *BM 77 FINN 83*

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 Eighty Six (86) press trips were managed through the Marketing Communications Unit.

- 2016 April – June: 16 *press trips*
- 2016 July – September: 14 *press trips*
- 2016 October – December: 28 *press trips*
- 2017 January – March: 28 *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 Fifteen (15) press trips.

- Reggae Sumfest Media Trip
- Culinary Press Trip
- Fat Tyre Media Press Trip
- Mobay City Run Media Trip
- Reggae Marathon Media Trip
- Rebel Salute Media Trip
- The Diaspora Conference
- National Senior Trials
- Kingston City Run
- Jamaica Pro am - Annies Revenge
- Makka Pro
- Styleweek
- Caribbean Fashion Week
- Liguanea Arts Festival
- Collection MODA

Other projects:

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

- **Intimate Stories-** This project was an activation for small or intimate properties on island. 14 video posts were created on the JTB Canada Facebook page between March 22 and June 21. The total reach of these videos was just over 500 K. Engagement on videos was impressive with a total 131,824 people commenting, liking and sharing the videos.
- **Jamaica House Rio-** Jamaica House 2016, the hospitality house for athletes, fans and lovers of Jamaica, opened on Wednesday, August 10, 2016. Jamaica joined more than

30 countries that transformed some of Rios most breathtaking locations into venues for enjoying culture, gastronomy and sport.

- **Travel Week VR-** Using the latest in immersive technology, a crew came on island to capture footage to simulate (virtual reality) being in Jamaica to include sights and sound.
- **Revolve-** Revolve Clothing is an online luxury fashion retailer. This retailer invites the world's top fashion bloggers to converge on destination Jamaica for one week. This showcased not only fashion but what the destination had to offer to these celebrities and their large audience.
- **Feel the Vibe-** With a mission of showcasing Jamaica beyond its beautiful beaches, and to inspire potential visitors to Feel The Vibe, an influencer campaign was developed. Influencers from US, Canada and UK were invited to experience the off the beaten path Jamaica and share it with their audiences. Tapping into the trends of authentic experiences, our itineraries were designed to surprise and delight each influencer based on their specialties including culinary, adventure, lifestyle, romance, etc.
 - Vagabrothers
 - Indulgent Eats
 - Planet D
 - I am Ella
 - Sarah Ashcroft
 - Tim Landis
- **Beyond Jerk-** Jamaica is known for several distinct flavours, but jerk is truly one that helped put the island on the map. Many travellers head to Jamaica to taste jerk and then also discover a plethora of culinary experiences and festivals beyond jerk. A campaign including a specialist trip was designed to explore these other gastronomic experiences.
- **Le Amour est dansle pre-** This television is based on farmers finding a spouse. The farmers who live in small communities and rarely have the time to meet single men or women. The TV show was facilitated through the production of an episode in Jamaica.
- **Lets Magazine-** *Please see below*
- **Bachelor Europe-** Is a popular reality tv dating show in Europe and is a franchise of the popular North American version. The show centers on a bachelor who is trying to find love with one of the many contestants. This was a major project that saw crew, accommodation and location being facilitated, with a media value of over 700.000 Euro and destination Jamaica on show to an audience of 7million.
- **Bachelorette Canada-** Canadian version of the perennially successful The Bachelorette, currently in its 11th season on ABC Network. The Bachelorette Canada is a romance-adventure reality series that focuses on 25 men in search of a connection with the

Bachelorette. This major project saw crew, accommodation and location being facilitated, with an audience size of 8 million viewers.

- **Grace Kennedy Birthright Programme-** The GraceKennedy Jamaican Birthright Programme is an internship opportunity open to university students living in North America and the United Kingdom who are second or third generation Jamaicans (of Jamaican parentage). Successful applicants must be between the ages of 18 and 25 years; pursuing either an undergraduate or post-graduate degree; and have a Grade 'B' average or higher. This partnership will see us having access to the next gen diaspora, influencer and traveler.
- **Tourism Presentation (2016 October)** – The Marketing Communications Unit made a presentation about destination Jamaica to MFAT Officers proceeding to overseas missions.
- **Experience Jamaica:** This year the campaign was broken in two. The second half started mid-August with a trade show on Aug 19. The 2015 campaign ended in November.
- **Radio Remote (2016 Nov 12- 16),The Edge Radio,Radio Mix 97-** These remotes were hosted on island with different partners. They saw destination Jamaica on show on prime time airwave to different markets.
- **Tourism Awareness Week:** The United Nations World Tourism Organization (UNWTO) established the theme for 2016 World Tourism Day, as “Tourism for All; Promoting Universal Accessibility” which highlighted the need to create an environment that facilitates access.

Presentations/Speeches/Remarks/Messages/Fact Checking:

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

Messages/ Speeches

TOTAL:

Breakdown: April – June (3)
July – September (6)
October to December (4)
January – March (4)

Editorial Content

Bi-Weekly editorial content for Hospitality Jamaica publication.

Friday Facts- A weekly newsletter distributed to partners

Fact Checking

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

Marketing Collaterals:

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

Let's Magazine:

1. JTB completed an influencer promotion with LET'S magazine on the Reggae Marathon in December 2016. The Board partnered with the China based publication LET'S magazine to feature Jamaica in the LET'S Most Beautiful Coastline Marathons World Tour 2016. Jamaica Reggae Marathon was the third stop, after Seychelles and Mauritius.
2. A Chinese delegation of celebrities and key opinion leaders (KOL) joined the Reggae Marathon and toured the island while sharing their experiences on China's main social media platforms Weibo and WeChat.
3. The team of KOLs included two celebrities, a well-known long-distance and World Champion runner and a famous movie actress, among the other running enthusiasts and LET'S team members, accompanied by Dr. Nicoleen Johnson, consultant in Chinese/Jamaican business enterprises.
4. Results as at December 21, 2016
 - a. LET'S November issue 2-page feature article – Print & Online 900,000 opportunities to see.
 - b. 8 articles published on LET'S WeChat account – 40,000 views
 - c. 15 tweets posted by KOLs – 35,000 fans
 - d. LET'S Weibo and WeChat event coverage postings – 1.5m views
 - e. 7 articles produced 26,000 views
 - f. 25 tweets on Weibo by LET'S & 30 tweets by celebrity with 3.5m followers
 - g. Dec 13 Let's magazine Reggae Marathon wrap communication – 300,000 opportunities to see
 - h. Feature article in LET's May- June 2017 issue and online to reach 870,000 readers
 - i. 3-minute video feature posted May on Youku.com & Tudou.com
5. China Business Network, the Jamaica Tourist Board's representative agency in China reposted the KOLs images during the LET'S promotion to increase engagement on Jamaica's WeChat with an online interactive promotion, redirecting the consumers to local Chinese tour operators selling Jamaica programmes for the Spring Festival holidays.

Website / E-Commerce Unit

The Website/E-commerce unit continued to acquire and distribute content about the destination via the internet in various forms in order to encourage visitors to travel to Jamaica. This process takes the form of highlighting user generated content via the JTB's social media platforms as well as engaging with our tourism partners to provide content for the website. During the 2016-2017 period, the unit undertook the following major activities:

- Facebook Global Pages
 - Prior to April 2016 there were several owned Facebook pages by the JTB's various overseas offices eg Visit Jamaica Canada, Visit Jamaica UK etc. In an effort to streamline our presence on Facebook, as well as to provide our audience with information that is relevant to their location, all JTB owned pages were converted into a Facebook Global Page. Facebook Global Pages allows for large organizations or brands to disseminate location specific information to their audience without the need for several pages. As such, Facebook users are automatically directed to the Visit Jamaica page for their region based on their location. The overall presence for the JTB is housed in one main Visit Jamaica page, which maintains the collective number of likes/followers for all the regions. To date the total number of likes for the Visit Jamaica Facebook page is 916,389. This figure is broken down as such:
 - - Visit Jamaica (Default): 809,812 likes
 - This page is seen by persons who are in countries without targeted regional pages.
 - Visit Jamaica UK: 35,469 likes
 - This page is seen by persons in Ireland and the UK for English, Spanish and French
 - Visit Jamaica Canada: 41,360 likes
 - This page is seen by persons in Canada for English and French
 - Ontdek Jamaica: 3,460 likes
 - This page is seen by persons in Saint Martin, Curacao, Bonaire, Sint Eustatius and Saba, Aruba, Germany, Belgium, and the Netherlands.
 - Visit Jamaica- D: 14,569 likes
 - This page is seen by persons in Liechtenstein, Austria, Switzerland and Germany.

- Visit Jamaica ES: 11,183 likes
 - This page is seen by persons in Spain
- VisitJamaicapl: 871 likes
 - This page is seen my persons in Poland
- Korean was added as a foreign language version of the website in August of 2016 to cater to that market. The website is now translated in five (5) foreign languages ie German, Portuguese, Spanish, French and Korean.
- The unit has also played a greater role in the management of the JTB's social media activities globally. Since December 2016 the unit has been responsible for preparing a monthly content calendar for dissemination to the overseas offices and representatives, to help guide their social media content for the upcoming month. In addition to sharing this calendar and associated images, the unit also shares strategic information to assist in guiding the overall presentation of JTB's social media. This information is shared with the teams in USA, Canada, UK, Europe, China and Korea.
- For the period April 2016 to April 2017, the social media impressions were as follows:

Platform	Total Impressions	Notes
Instagram	Over 2,281,086	Data is only available from July 26, 2016
Facebook	10,823,850	Organic: 8,068,600 Paid: 2,755,250
Twitter	3,724,200	
WEBSITE TRAFFIC		
Sessions: 2,097,806	% New Sessions: 80.23%	Users: 1,694,789
Pageviews: 5,013,201	Bounce rate: 65.37%	New Users: 1,683,106

At the end of the 2016-2017 year, the assets of the JTB, managed by the Website/E-Commerce Unit, were:

Website:

- www.visitjamaica.com

Microsites:

- www.feelthevibejamaica.com
- www.ultimatejamaicastaycation.com
- www.experiencejamaicavacations.com

Facebook:

- www.facebook.com/visitjamaica

YouTube:

- www.youtube.com/aboutjamaicajtb
- www.youtube.com/vibesjamaicajtb
- www.youtube.com/myjamaicajtb

Twitter:

- www.twitter.com/visitjamaicanow
- www.twitter.com/weddingsinja
- www.twitter.com/askjamaica [This account was 'disabled' as at January 1, 2017, as such no content has been posted to the page. The page was left open to assist in directing persons over to our main Twitter handle @VisitJamaicaNow, which it does by way of its primary images (header and profile images). In addition, direct messages and mentions continue to come in to this account, as such we continue to monitor the page.]

Pinterest:

- www.pinterest.com/myjamaica

Instagram:

- www.instagram.com/visitjamaica
- www.instagram.com/carnivalinjamaica [The JTB has ownership of this handle for any possible future use. This was negotiated through the Ministry of Tourism subsequent to their marketing efforts surrounding Carnival in Jamaica 2017. The account is inactive and there are no posts to date of this report.]

Blog:

- www.islandbuzzjamaica.com

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

- Media opportunities: trips for media, bloggers and photo shoots where participants were encouraged to share their experiences with the JTB via social media. Where appropriate, the unit shares this content by reposting/retweeting to JTB's owned social media pages. The unit also engages with these persons during and after their visit.
- Event Support: members of the team are dispatched to cover major events sponsored by the JTB. This support is typically in the form of live social media coverage and photography. Additionally, social media marketing plans and content schedules are crafted for specific major events eg Reggae Sumfest, Tmrw Tday.
- Competitions trivia and give-aways are used to heighten awareness of event and significant activities in the market.

- Support for special promotional activities in the marketplace as needed. This support includes but is not limited to vetting influencers, preparing and tracking analytics for campaigns, providing images and working with the technical teams behind microsite development. These promotional activities include marketing campaigns such as the Feel the Vibe Jamaica influencer campaign, Experience Jamaica, Display Campaigns etc.

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

Tourism Awareness Unit

The Tourism Awareness unit continues to stride towards achieving an increased level of awareness of tourism among Jamaicans. It has participated in a number of initiatives and activities in an effort to achieve this. Presentations, competitions and the Tourism Action Clubs (TAC) have been the main areas of continued focus to heighten awareness. Provision of timely and accurate information also forms a base for the unit.

Presentations

Carefully prepared presentations were delivered to students (*ranging from the primary to tertiary level*), tourism workers and other interest groups relevant to their specific needs. These presentations were geared towards highlighting the importance of tourism to Jamaica and its impact on Jamaicans. Tourism was presented as the all-encompassing industry through linkages, showcasing the career opportunities available directly or indirectly.

These presentations were held at the various educational institutions, the Jamaica Tourist Board Headquarters Offices or facilitated by our partners in the industry. They take the form of informational sessions or field trips, seminars, forums or career fairs.

The Tourism Awareness Unit delivered a total of 36 presentations throughout the year to 2,801 individuals. Two thousand three hundred and eighty-nine (2,389) of this total were students and the remaining 412 persons from various interest groups.

Competitions

The Tourism Awareness Unit also facilitated several competitions. Some of the international competitions coordinated by the Unit were the CTO Youth Congress, GTTP Travel Writing Competition, GTTP Research Award, FCCA Essay and Poster Competitions. The Unit also

facilitated local competitions such as the JET Research Day Competition, TACJamaica online competitions along with a tourism jingle competition.

Facilitating and encouraging participation in these competitions from the Tourism Action Clubs (TAC), were geared towards raising the level of interest for tourism and promoting an active engagement in the industry through research, social media and other activities. These competitions also serve as a training ground for future leaders and the continuity of the industry.

The winner of the local round for the CTO Youth Congress 2016 earned the title of the Junior Minister of Tourism for Jamaica and went on to represent Jamaica at the State of the Industry Conference (SOTIC) Conference 2016 in Barbados. The winning school group for the GTTP Research and Award Case Study Competition 2016 also went to represent Jamaica at a Student/Teacher Conference in Nice, France in 2016.

Tourism Action Clubs

The Jamaica Tourist Board (JTB) continued to ensure that great emphasis is placed on the maintenance of a vibrant tourism network among students throughout the island. This was facilitated primarily through the Tourism Action Clubs (TAC) in schools at both the secondary and tertiary level. These clubs were provided with great support from the JTB through an active presence and participation in club activities. These clubs were encouraged to explore the educational, recreational and community involvement opportunities in the tourist industry. They were further encouraged to create and promote a positive learning environment and experience for students who are interested in tourism. In an effort to increase connectivity with the schools in the TAC programme, steps were taken to redevelop the TAC website to promote interaction.

In celebration of the GTTP'S 20th Anniversary, an outside Broadcast and Poster Exhibition was held in Kingston. There was also an event to recognize long standing schools and teachers in the programme.

There are approximately 103 active TACs, 8 of which were newly established clubs and 7 reactivated ones. The average number of members in the TACs overall is 3,510.

Provision of Information

The Tourism Awareness Unit also manages information requests from the tacjamaica.com and the visitjamaica.com mailbox. Most of the international queries came from visitors from North

America, Europe, the Middle East and the Caribbean. Assistance was provided with the research and execution of travel itineraries and the provision of promotional materials.

The Unit also assists local clients with information on the tourism product, events and activities and the industry as a whole. Requests have been received from staff advisors, teachers and students of both the secondary and tertiary educational institutions relating to their academic programs. Queries received from media entities are channelled to the Marketing Communications Unit.

Other Programmes/Activities

The Tourism Awareness Unit also observed and participated in the World Tourism Day celebration activities coordinated by the JTB. It also facilitated participation from the TAC to support JET 2016 International Coastal Clean-Up Day.

The Tourism Awareness Unit was also integral in the selection and management of the summer University Internship Programme in collaboration with the Human Resource Department. It also facilitated a few community service students for the purposes of immersing them in the industry while providing valuable working experience.

With the use of smart technology, a SMART TV was introduced to feature tourism partners and increase tourism awareness among locals and visitors alike, showcasing the diverse tourism product of the Jamaica.

The Tourism Awareness Unit also created a tourist information booklet and shared with the Police at the New Kingston Headquarters.

The Clive E. Taffe Information and Resources Centre

The IRC continues to fulfill its mission for maintenance and management of access to relevant, current and accurate information sources. This is necessary to support the information needs of the organization in achieving its goals and objectives, and also to facilitate researchers of the tourism trade and the wider society.

The presence of the Tourism Information Publishing Site (TIPS) platform for the Jamaica Tourist Board online presence was enhanced through the improvement of <http://www.jtbonline.org>. This platform provided greater protection for our assets, while improving the accessibility provided to our researchers and partners to information held in the Information and Resources

Centre. The use of a signup for registration allowed for the monitoring and garnering of statistics, of the number of visitors to the site and the areas of information accessed.

New visitors for the period numbered 32,029 while the numbers of returning visitors were 21,524. Total sessions for the period were 53,553. Users of the site were from Jamaica, United States of America, Canada, India, Germany, Australia, Spain, Trinidad & Tobago and France. Page views totalled 138,083.

Acquisition and Access - The physical collection stood at over 7000 items, while access to the electronic collections including Ebsco Host's Hospitality and Tourism Complete, UNWTO's E-library, ProQuest's Ebrary, Social and Economic Network and our Jamaica Digital Collections accounted for over 1,000,000 sources of information. Open Access Databases were also used to provide data for our clients. These open sources included the World Bank Open Data, Google Public Data and World Fact Book produced by the United States of America Central Intelligence Agency (CIA).

These sources were used to supply 1,142 current awareness pieces, 1,301 information research request, 1,797 images were provided directly to tourism researchers, publishers and other interests. Persons visiting the physical facility, including staff of the Ministry of Tourism and other sister agencies, totalled 868.

Images Management- Over the period the unit continued its supply of images to partners, researchers and the public through its in-house image bank. Increasingly, www.jtbonline.org is being used by the public to access unrestricted images in the promotion of Jamaica's tourism product. The number of images acquired from tourism partners for the period totalled 3,620.

Records Management- The IRC continued to support the Administration Department in the development of systems to manage the records and information programme of the Jamaica Tourist Board.

Recovery and Conversion- Work continued in adjusting physical and electronic sources to more accessible formats.

Research and Publishing- The unit continued to evaluate areas of information needs, and liaised with other information partners to narrow information gaps in the collection.

Research & Market Intelligence

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

The island recorded total arrivals of 3.8 million persons for the year 2016, from which it earned US\$2.6 billion. Just over 46,500 persons were employed directly by the accommodation sector of the industry to host our visitors, 64% of whom are from the United States. Please see **Appendix I** for a summarized report of the statistical data for the period under review.

CRUISE, EVENTS AND ATTRACTIONS DEPARTMENT

CRUISE SHIPPING:

The JTB had been designated the responsibility for marketing Jamaica as a cruise destination. However, the modality of this and funding for the related activities through which the department would carry out its mandate is still to be worked out. The need for a strengthening of interagency collaboration and communication on all cruise related matters is recognized and is under consideration. As a result, the department had been undergoing a period of examination and transition during the year under review.

ATTRACTIONS:

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

EVENTS:

Events continue to be integrated in the marketing mix to provide additional “visitor pull” and leveraged to generate positive international media exposure.

In March 2017, the department hosted an Events Seminar which targeted some 120 event promoters and one which had the following objectives:

- To create an awareness of our tourism product
- To inform them of the process and criteria required to obtain JTB's sponsorship /endorsement
- To help the promoters better understand the slow periods within the tourism season and encourage them to stage events during those times
- To help them to better understand the JTB's objective of using events as a marketing strategy to pull visitors and the international media to the destination
- To provide an excellent networking opportunity at the seminar

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":

THE ARTS:

- Talking Trees Literary Fiesta, May 23, Treasure Beach, St. Elizabeth
- Calabash Literary Festival – June 3-5, Treasure Beach, St. Elizabeth
- DRP Writers Retreat, June 5 – 7, Lime Hall, St. Ann
- Kingston on the Edge (KOTE) Urban Art Festival, June 19 - 25, Kingston
- Liguanea Art Festival – November 6, Kingston
- Spaces, December 1, Kingston

CULTURE

- Rebel Salute, January 13-14, Richmond Estate, St. Ann
- Negril Reggae Fest- February 26-27, Negril
- 24th Annual Bob Marley Birthday Bash, February 1 – 6, Negril, Westmoreland
- !Love Music Fest – Feb. 4 & 5, Montego Bay
- Earth Hour Concert, March 19, Kingston
- Jamaica Ocho Rios International Jazz Festival, May 28-June 5, Ocho Rios St. Ann and Kingston
- One World Ska & Rocksteady Festival, May 28-29, Kingston
- Sweatfest, June 3-5, Montego Bay, St. James
- Reggae Sumfest, July 17-23, Montego Bay, St. James
- Jamaica Sound System Festival, October 22 – 24, Richmond, St. Ann
- Rastafari Rootzfest, November 12 – 15, Negril, Westmoreland
- Wickie Wackie Music Festival, December 12 – 13, Bull Bay, St. Thomas

SPORTS:

- Arthur Wylie Foundation Celebrity & Global Leader Golf Tournament, January 14 – 17, Montego Bay, St. James
- Tennis Events in Jamaica ITF Senior Championship, April 21 – 28, Montego Bay, St. James
- JHTA Charity Golf Tournament, April 26, Montego Bay, St. James
- RuJohn Foundation – Celebrity Sports Camp, June 21 - 27, Kingston

ADVENTURE SPORTS:

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

ENDURANCE, HEALTH & WELLNESS:

- Mobay City Run, May 13, Montego Bay, St. James
- Tmrw Tday Culture Fest – May 17 -23, Negril
- Disabled Peoples' International North America & Caribbean (DPINAC) Inc. Regional Assembly, June 16 – 18, Kingston

CULINARY:

- Westmoreland Mango Jam - April 24, Savanna La Mar, Westmoreland
- Portland Jerk Festival, July 5, Port Antonio, Portland
- Denbigh Agricultural Industrial & Food Show, July 31 – August 2, May Pen, Clarendon
- Montego Bay Jerk Festival, August 1, Montego Bay, St. James
- Port Morant Banana Festival, October 19, Port Maria, St. Mary
- Kingston Jerk & Gospel Music Festival, October 19, Kingston
- Jamaica Food & Drink Festival – October 26-30, Kingston
- Nyam Jam Food & Music Festival, November 13 – 15, Oracabessa, St. Mary
- PAN X, June 23 – November 1, various locations Islandwide
- Annual Milk River Seafood & Jerk Festival, December 18, Milk River, Clarendon

FAITH BASED:

- Praise on the Beach, April 25, Montego Bay, St. James
- Spring Praise, March 31 – April 3, Folly, Portland
- Come Celebrate Jesus – October 7 – Montego Bay

HERITAGE:

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

FASHION/ BEAUTY/ LIFESTYLE

- Styleweek, May 24 - 28, Kingston
- Caribbean Fashion Week, June 17-20, Kingston
- Miss Jamaica World Beauty with A Purpose Pageant, June 21 –Aug. 21, Kingston
- Mobay Nite Out – September 26, Montego Bay
- Ms. Global Pageant – September 6-10, Montego Bay
- Fashion Showcase Weekend, October 22 – 24, Montego Bay, St. James
- The Collection Moda, November 17-21, Kingston

CONFERENCE/ CONVENTION/ EXPO:

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

EMANCIPENDENCE & DIASPORA HOMECOMING REUNIONS:

- The Vinyl Record Collectors Association 'Sit In' – May 26-29., Kingston
- The Original Startime – July 8, Kingston
- Appleton Estate Dream Weekend, July 28 – August 1, Negril, Westmoreland

- Merritone Homecoming & Family Reunion, October 11 - 19, Kingston & Montego Bay, St. James
- Portland Paradise Weekend – November 11-13, Port Antonio

CONTINGENCY/ SPECIAL PROJECTS:

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

JAMAICA SPORT

In 2016 / 2017 The Jamaica Sport Unit continued to reduce its operations as a Unit within the Jamaica Tourist Board. The Unit was initially appointed by the Ministry of Tourism and funded by the Tourism Enhancement Fund (TEF), with the core objectives of investing in sporting opportunities that would generate positive returns for Jamaica and promote the island as the premier sport tourism destination in the region.

However, due to a change in the financial operations of the TEF which removed this funding ability, the unit was disbanded and its functions and operations subsumed back into the Events Department.

JAMAICA SPORT EVENTS SPONSORED:

- 2nd Female Beach Volleyball Olympic Qualifier, January 29 – February 1, Ocho Rios, St. Ann
- AISK Sports Feva, February 26 - 27 & March 6, Kingston & Portmore, St. Catherine
- Kingston City Run, March 13, Kingston
- Badminton International, March 17 - 20, Kingston
- Venus Invitational (Volleyball) Tournament, March 18 - 20, GC Foster College, St. Catherine
- Jakes Off Road Triathlon - April 18, Treasure Beach, St. Elizabeth
- ITF Senior Championship - April 21 - 26, Montego Bay, St. James
- Caribbean Beach Volleyball Champs - April 30 – May 4, Ocho Rios Bay Beach, St. Ann
- Jamaica Int'l Invitational Meet (JIIM) - May 9, Kingston
- WI VS England /Australia Test Series, June 2015, Kingston
- Makka Pro Surf Contest, July 20 - 27, Yallahs, St. Thomas
- Caribbean Amateur Golf Championship, July 27 - 31, Montego Bay, St. James
- Jamaica International Masters Tournament, August 1, Montego Bay, St. James
- The BREDS Treasure Beach T20 Cup, September 13 – 27, Treasure Beach, St. Elizabeth
- Caribbean Gymnastics Championship, November 14 - 15, Kingston

- UWI Volleyball Invitational, November 18 - 20, Kingston
- Spinning Escape Jamaica – November 2-3, Negril
- Jamaica Classic Montego Bay – November 17-29
- Reggae Marathon – December 1-3, Negril, Westmoreland

MANAGEMENT INFORMATION SYSTEMS

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

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

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

- ❖ Cloud based service migrations
 - Completed email services migration from Lotus Domino to MS office 365 E1 service plan
 - Completed setup and migration of email archives facilities to the cloud
 - Consolidated all JTB email domains under single visitjamaica.com
 - Leveraged office productivity utilities within the MS office 365 E1 plan – include file sharing and collaboration utilities
 - Assessed / recommended data mining and business intelligence utilities
- ❖ Websites
 - Developed revised templates and workflows for redesign of jtbonline.org (TIPS)
 - Commenced TIPS data migration exercises to move to new platform
 - Conducted visitjamaica.com technical review

- ❖ Customer Relationship Management (CRM)
 - Prepared RFP for selection of corporate CRM solution
 - Conducted assessment and recommendation of CRM
 - Commenced CRM planning and implementation exercises

- ❖ Data entry / MIST
 - Conducted revised immigration card data entry simulation exercise to assess potential to reduce turnaround time using PICA captured data
 - Explored upgrade path for Management Information System for Tourism used to support the immigration card data entry activities

- ❖ General Administration
 - Conducted and monitored health/security checks to maintain integrity of systems and data
 - Provided technical support to staff worldwide and responded to help desk issues
 - Provided operational support to functional units

REGIONAL OFFICE

The JTB's Regional Office, which is based in Montego Bay, continued to provide support at the local level to various JTB programmes by facilitating:

- Travel agent familiarization trips
- Visitor Relations
- Press Trips (in support of the Marketing Department)
- Radio Remotes
- Meet the People Programme
- Special events and promotions
- Industry liaison (with JHTA and Resort Boards)
- Community liaison (with Chambers of Commerce, Service Clubs, local schools' career day activities, etc.)
- Information and facilitation services at the island's international airports (mainly MBJ)

2016/2017 Travel Agent/Tour Operator Arrivals

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

United States – 504

Canada – 221

United Kingdom & Europe – 178

Caribbean – 24

Latin America - 21

Familiarisation Trips – 68

A major emphasis has been placed on the Caribbean Market in pursuit of generating an increase in visitor arrivals from that region. As a result, numerous strategies were implemented to increase our visibility within that market. One of the strategies executed included the collaboration with the Jamaica Hotel & Tourist Association (JHTA) for the hosting of a ‘Sales Blitz’ in Trinidad and Tobago, our second largest source of Caribbean visitors, to promote Jamaica as a ‘bleisure’ business/holiday destination. The venture was held over the period October 17 – 22, 2016, for travel agents and consumers. Fourteen JHTA partners in Kingston and the Ocho Rios Resort Areas also participated in the initiative.

The Board has also collaborated with GuestServe Inc. to develop a marketing programme for the Small Accommodations sector. The medium will serve as an avenue through which clients can make direct bookings for their property. The Sales Team has been working assiduously to enlist greater participation of small accommodations sector partners. There will be even more activities carried out in 2017/2018, mostly in the three main markets of Cayman Islands, Trinidad and Tobago, and the Bahamas.

The Visitor Relations Unit continued to provide the following:

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

- Extend Airport Meet & Greet Courtesies to:
 - VIP Card Holders - 380
 - Travel Specialists - 324
 - Others: - 3,818
 - Groups/Weddings, Honeymoon/Conventions, Meeting Planners
- Hotel Reservations - 85 reservations for 41 visitors
- Destination Weddings - 201

Meet- The-People Unit

The Meet-The-People (MTP) programme has been fostering cultural exchanges with our overseas visitors and creating lasting friendships with our fellow Jamaicans since its inception. The work of the unit leaves our visitors feeling satisfied as they can now boast that Jamaica has more to offer than sea, sand and sun; there is also the guarantee of earning an unforgettable cultural experience.

The programme encountered a number of challenges during the year under review which made it difficult for all the requests received to be fulfilled. Despite the challenges, however, thirty (30) persons were accommodated by MTP volunteers at their homes, places of business, restaurants, hotels, educational and health institutions, etc. There was also the arrangement of a 'voluntourism' experience at one of our local homes.

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

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

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 December 2016:

- Caribbean's Leading Tourist Board (Jamaica Tourist Board)
- Caribbean's Leading Destination (Jamaica)
- Caribbean's Leading Cruise Destination (Jamaica)
- Caribbean's Leading Cruise Port (Port of Ocho Rios, Jamaica)
- Caribbean's Leading Home Port (Port of Montego Bay, Jamaica)

- Caribbean's Leading Airport (Sangster International Airport, Jamaica)
- Caribbean's Leading Airport Lounge (Club Mobay @ Sangster International Airport, Jamaica)
- Caribbean's Leading Meetings & Conference Centre (Montego Bay Convention Centre, Jamaica)

OTHER AWARDS:

TRAVVY AWARD (GOLD)

- Best Honeymoon Destination, Caribbean
- Best Culinary Destination, Caribbean
- Best Tourist Board Overall
- Best Tourism Board, Caribbean

TRIPADVISOR TRAVELERS' CHOICE AWARDS 2017

- Category: Top 25 Destinations – World
 - Jamaica #12
- Category: Top 25 Beaches – World
 - Seven Mile Beach, Negril - #15
- Category: Top 25 Hotels for Families in the World
 - Beaches Negril Resort & Spa - #9

TRAVEL AGE WEST WAVE AWARDS

- Category: International Tourism Board Providing the Best Travel Agent Support
- Winner: Jamaica Tourist Board

BAXTER TRAVEL MEDIA AWARDS

- Favourite Tourist Board in Canada

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 2016/17, licences were approved for 5,790 entities as set out hereunder:

ENTITIES	RENEWAL	NEW	TOTAL
ATTRACTION	24	8	32
BIKE	6	0	6
CAR RENTAL	46	4	50
DOMESTIC TOUR	96	8	104
WATERSPORTS	87	11	98
HOTELS	0	11	11
NON HOTEL	0	17	17
TRAVEL HALT	0	2	2
CONTRACT CARRIAGE	3,883	191	4,074
DOM. TOUR CON. CARR.	439	9	448
CRAFT	938	10	948
PLACE OF INTEREST	0	0	0
TOTAL	5,519	271	5,790

STATISTICS

INTERNATIONAL

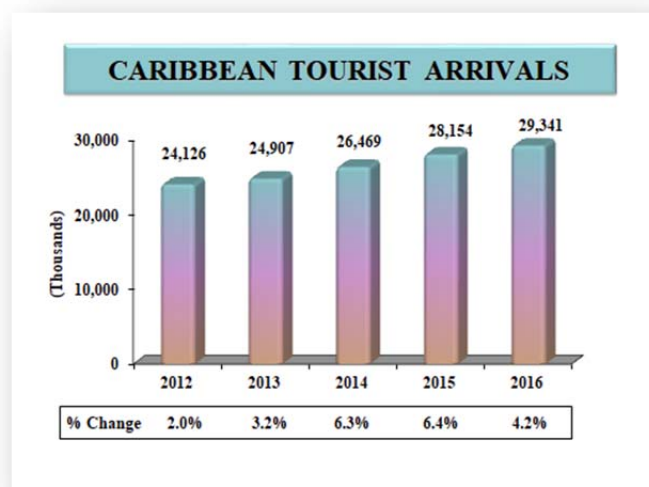
The year 2016 was the seventh consecutive year of sustained growth, in international travel. The World Tourism Organization (UNWTO) reported that International tourist arrivals grew by 3.9% in 2016, reaching a 1,235 million.⁷

As a result, over 300 million more international tourists travelled the world in 2016 as compared to the pre-crisis record of 928 million international tourists in 2008.

All world regions, with the exception of Middle East, recorded growth in international tourist arrivals for 2016. The strongest growths were registered in Asia and the Pacific, Africa, and the Americas, with 8.6%, 8.2% and 3.9% respectively. At slightly lower rate of growth was recorded for Europe, with 2.1%, and the Middle East, with a decline of 4.0%. Europe, the most visited region with approximately half the world's international tourist, saw an increase of 12 million arrivals in 2016, reaching a total of 615 million. The second most visited region in the world, Asia and the Pacific increased by 22.5 million more arrivals to a total of 305.6 million. The Americas, to which Jamaica is a part, with a growth of 3.9%, welcomed an additional 7.5 million international tourist raising the total to 200.2 million. Growth -was driven by the North America posting a growth of 10.6%, with 131.4 million arrivals.

CARIBBEAN

The Caribbean Tourism Organization (CTO) reported that in 2016 there was continued demand for travel to the region and a record 29.3 million visitors came to 'enjoy the un-equalled and diverse experiences' the Caribbean had to offer. This was 1.2 million more tourist arrivals, a 4.2% increase over in 2015⁸



⁷ UNWTO World Tourism Barometer – Volume 15 January 2017.

⁸ Caribbean Tourism Annual Statistical Report, 2016.

The Caribbean region demonstrated that it's diversity of cultures to its authentic natural experiences, offered numerous enjoyable, refreshing and relaxing encounters. The main contributing factors for the regions positive growth included greater air access from source markets to the region, the realization of significant investments to enhance infrastructure and product offerings, and innovative marketing. The United States remained the most important supplier of tourists to the region with a growth of a 3.5% increase in arrivals. Over 14 million Americans visited the region with most arriving in Dominican Republic, Puerto Rico, Jamaica and The Bahamas. European arrivals showed increased growth in arrivals of 11.4%, while arrivals from Canada decreased by 3.4%, and Intra-regional travel as a whole grew by 3.6%.

CARIBBEAN TOURISM PERFORMANCE BY MAIN MARKET REGIONS						
MAJOR MARKET	2012	2013	2014	2015	2016	%CH.
USA	11,972.7	12,329.9	13,325.5	14,133.5	14,630.9	3.5%
CANADA	3,057.4	3,075.9	3,277.0	3,424.1	3,306.6	-3.4%
EUROPE	4,600.6	4,596.8	4,870.6	5,060.1	5,634.6	11.4%
CARIBBEAN	1,552.6	1,568.3	1,549.4	1,653.2	1,712.1	3.6%
SOUTH AMERICA	1,393.5	1,530.7	1,744.6	2,021.9	1,808.1	-10.6%
OTHER	1,549.6	1,805.0	1,702.5	1,861.2	2,249.0	20.8%
TOTAL TOURIST ARRIVALS ('000)	24,126.4	24,906.6	26,469.6	28,154.0	29,341.3	4.2%
Source Caribbean Tourism Organization						

The top three most visited islands in the region were: Dominican Republic, Cuba, and Jamaica, in descending order of importance. Overall, the CARICOM countries recorded a 4.1% growth for 2016; the Dutch Caribbean recorded a 5.6% decrease over 2015. The performance of the Spanish speaking Caribbean upheld its dominance in total arrivals receiving 48.4% of tourist arrivals, with a positive growth of 7.4% increase over 2015.

The Caribbean Cruise sector is estimated to have increased by 1.3% in passenger arrivals during 2016 to over 26 million. thirteen of the twenty-six destinations recorded increased cruise activity in 2016 over 2014. 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 51% of the market and representing 13.5 million passengers.

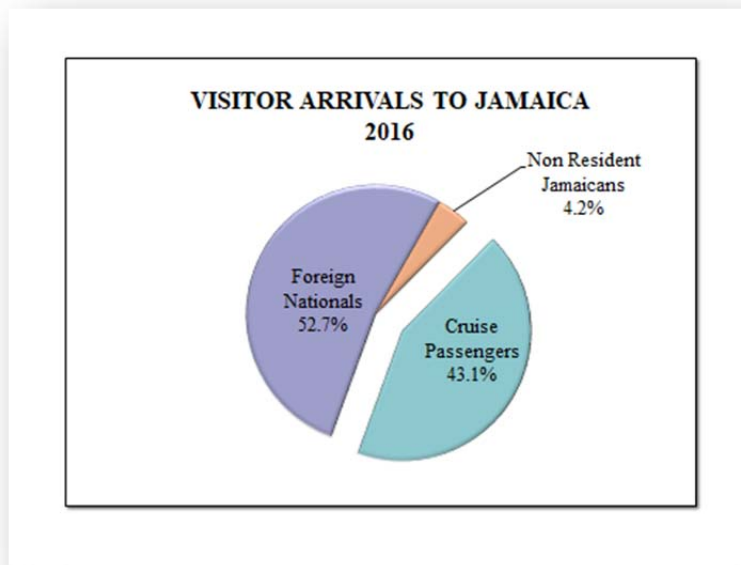
A subset of the cruise passenger arrivals in 2016 are compared with 2015 figures⁹.

Cruise Passenger Arrivals - 2016 & 2015			
Destination	2015	2016	% Change
Bahamas	4,513.5	4,690.4	3.9%
Cozumel (Mexico)	3,396.1	3,637.3	7.1%
US Virgin Islands	1,878.8	1,776.7	-5.4%
Cayman Islands	1,716.8	1,711.8	-0.3%
St. Maarten	1,901.6	1,668.9	-12.2%
Jamaica	1,568.7	1,655.6	5.5%
Puerto Rico	1,457.2	1,401.9	-3.8%
Belize	958.0	1,005.4	4.9%
Turks & Caicos Islands	929.7	847.0	-8.9%
Dominican Republic	529.0	809.3	53.0%
British Virgin Islands	516.4	699.1	35.4%
Aruba	607.0	656.0	8.1%
Antigua and Barbuda	644.3	608.5	-5.6%
Barbados	586.6	594.1	1.3%
St. Lucia	677.4	587.7	-13.2%
St. Kitts & Nevis	990.4	524.5	-47.0%
Curacao	565.8	470.7	-16.8%
Bermuda	370.8	397.9	7.3%
Grenada	280.5	314.9	12.3%
St. Kitts & Nevis	673.5	285.0	-57.7%
Dominica	279.5	277.1	-0.8%
Martinique	241.6	276.1	14.3%
Source: CTO data supplied by member countries			

⁹ Caribbean Tourism Annual Statistical Report 2016

VISITOR ARRIVALS TO JAMAICA

- Total stopover arrivals of 2,181,684 increased by 2.8%
 - Foreign Nationals of 2,020,381 increased by 2.4%
 - Non-resident Jamaicans of 161,303 increased by 7.7%
- Cruise passenger arrivals of 1,655,559 increased by 5.5%



STOPOVERS

Total stopover arrivals for the year 2016, exceeded the 2 millionth mark for the fourth consecutive year, to reach a record of 2,181,684, which was 2.8% above the 2,123,042 arrivals recorded in 2015. This figure represents 58,642 more stopovers than in 2015. In the first quarter of 2016, Jamaica recorded a 3.2% positive growth in stopover arrivals over the 2015 figures. During the second quarter this growth fell to 1.8%. In the third quarter this growth moved up to 2.7%. In the last and final quarter of 2016, this growth continued and ended with a growth of 3.4%. This growth was led by the increase of 5.2% in arrivals during the month of December.

Tourist arrivals in 2016 outperformed those in each quarter of 2014, with growth rates of - 8.4%, 2.9%, 3.7% and 4.4%, 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 2016 were as follows:

- Maintaining high visibility in the traditional market places of North America, Latin America and Europe through an integrated promotional and communications programme.
- The advertising campaign, the "All You Can" digital ad campaign for the US market to boost summer visitor arrivals. The campaign highlighted "All You Can" do in Jamaica: all you can taste, all you can dive, all you can party...all in one island.
- Jamaica's destination website continued to be used as the primary "call to action" for advertisements and promotion. The website is considered to be a repository of destination activities, accommodations, and the unique elements that make the island appealing to the traveler. To better manage and coordinate content posted on the Board's social media platform, regional Facebook pages were merged to the social media giant's global Facebook to allow the board to share content across territories as appropriate.
- Sales activities continued to be an integral link with travel trade partners in the marketplace. These facilitated one-on-one as well as group interactions with travel agents and tour operators who drive tourism business to Jamaica.
- During 2016, the Visiting Journalist Programme hosted over 200 travel trade journalists from all major source markets, USA, Canada, Latin America, UK/ Europe and Asia. Additionally, the facilitation with major television stations and production companies from North America, Latin America and Europe on the filming of top rated reality shows on the island. The coverage of the destination by consumer and travel trade media has expanded the visibility of the Jamaican tourism product.
- A number of new and re-branded hotels opened in 2016, resulting in the availability of more rooms.
- On-island Travel Agents' Familiarization tours with reps from the USA, Canada, Europe and Latin America, continued to educate travel agents on the Jamaican Tourism Product.

Destination Jamaica continues to offer a diverse product of very high quality to its visitors, through its expansive and inclusive nature in 2016. 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 2016 the overall average intended length of stay for foreign nationals was 8.8 nights; which was the same level as in 2015. 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 9.2 nights.

American visitors, on the average, stayed 7.6 nights while Canadians stayed an average of 9.0 nights. Visitors from the United Kingdom recorded an average length of stay of 15.3 nights and those visitors from Continental Europe stayed 11.9 nights.

Purpose of Visit

Of the 2,181,684 stopover arrivals who visited the island during 2016, a total of 1,599,129 or 73.3% were visiting for the purpose of leisure, recreation and holiday; 16.5% were visiting Friends and Relatives, 4.5% were on business, and the remaining 5.7% were on other or unstated purposes. (See page 36, Table 8.1)

Hotel Room Occupancy

The average available room capacity rose by 8.1% in 2016, moving from 19,005 rooms in 2015 to 20,543 rooms in 2016. Total room nights sold of 4,818,611 in 2016 was up 0.7% above the 4,783,862 room nights sold in 2015. Hotel room occupancy declined by 4.9 percentage point to 64.1%, compared to the 69.0% level in 2015. The number of stopovers that intended to stay in hotel accommodations increased from 1,444,625 in 2015 to 1,482,004, an increase of approximately 2.6% in 2016.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 66.8%, which was down by 6.2% from the 73.0% recorded in 2015. The total number of room nights sold decreased by 4.9% moving from 1,947,392 in 2015 to 1,851,574 in 2016. The average room capacity increased by 3.7% in 2016, moving from 7,304 rooms in 2015 to 7,576 rooms in 2016. The number of stopovers that intended to stay in hotel accommodations increased from 609,442 in 2015 to 615,394, an increase of 1.0% in 2016.

The average hotel room occupancy rate for Ocho Rios was 65.1%, which was 4.9 percentage points lower than the 69.0% recorded in 2015. The total number of hotel room nights sold moved from 1,252,434 in 2015 to 1,409,603 in 2016 an increase of 12.5%. The number of stopovers that intended to stay in hotel accommodations recorded an increase, moving from 379,021 in 2014 to 413,731 in 2016 which was an increase of 9.2%.

The resort area of Negril recorded an average hotel room occupancy rate of 63.3% in comparison to the rate of 66.8% in 2015. The number of hotel room nights sold in this resort area fell by 2.2%, recording 1,164,881 room nights sold compared 1,190,791 sold in 2015. The average room capacity increased by 2.9% in 2016, moving from 4,885 rooms in 2015 to 5,027 rooms in 2016. The number of stopovers that intended to stay in hotel accommodations increased from 352,270 in 2015 to 354,634, which was an increase of 0.7% in 2016.

In the Mandeville/Southcoast resort area, average hotel room occupancy rate decreased by 4.3 percentage points, moving from 58.8% in 2015 to 54.5% in 2016. Room nights sold fell from 126,956 in 2015 to 122,445 being sold in 2016.

Kingston & St. Andrew achieved a hotel room occupancy level of 57.1%, which was 5.3 percentage points lower than the 62.3% recorded in 2015. The number of room nights sold in Kingston & St. Andrew increased by 1.7%, moving from 258,799 in 2015 to 263,161 in 2016.

Hotel room occupancy for the resort area of Port Antonio was 13.1%, which was 4.9 percentage points below the level of 18.0% recorded in 2015. The number of room nights sold in Port Antonio fell from 7,490 in 2015 to 6,947 in 2016.

Overall, the all-inclusive hotel room occupancy rate declined to 70.3% which was 5.4 percentage points lower than the level of 75.8%, as recorded in 2015. Non all-inclusive room occupancy rate moved down from 38.2% in 2015 to 38.2% in 2016.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 28.7%. Hotels with 51 – 100 rooms, achieved a rate of 35.5%. The number of stopovers that intended to stay in hotels with less than 100 rooms decreased from 136,217 in 2015 to 126,904, a decrease of 6.8% in 2016. Hotels in the size range of 101 – 200 rooms recorded an occupancy rate of 61.9%, and hotels with over 200 rooms achieved a room

occupancy rate of 73.1%. The number of stopovers that intended to stay in hotels with more than 100 rooms was 1,355,100 which was higher than the 1,308,408 in 2015.

Visitor Expenditure

Gross visitor expenditure in 2016 was estimated at approximately US\$2.609 billion. This represents an increase of 8.6% against the estimated US\$2.402 billion earned in 2015.

Total expenditure of Foreign Nationals amounted to US\$2.372 billion. Cruise passenger expenditure totaled US\$0.150 billion while US\$0.086 billion was estimated as the contribution of Non-Resident Jamaicans.

Foreign Nationals spent on the average US\$134 per person per night while cruise passengers spent an average of US\$90 per person per night.

Direct Employment in the Accommodation Sector

The number of persons employed directly in the accommodation sub-sector moved from 39,255 in 2015 to 46,551 in 2016, an increase of 18.6%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 41,979 persons or 90.2% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 20,490 direct jobs represented 44.0% of those employed, Negril with 11,758 direct jobs, accounted for 25.3%, and Ocho Rios with 9,731, was responsible for 20.9%. Kingston, Port Antonio and the South coast accounted for the remaining 9.8% of employment in the accommodation sector.

The average number of employees per room in 2016 was estimated at 1.56.

New Developments 2017

Airlift

- Swift Airline is scheduled to begin operations out of Pittsburgh, Pennsylvania; Nashville and Cincinnati, Tennessee; Cleveland, Ohio; Dallas, Texas; and Atlanta, Georgia, starting in the summer.
- Southwest Airlines is scheduled to increase frequency out of Baltimore, Maryland and to begin a new service out of Ft. Lauderdale, Florida during the summer.
- Delta Airlines will be offering service out of Boston, Massachusetts.
- Thomsonfly to introduce service into Sangster's International Airport from Dublin, Ireland.
- Evelop Airlines to operate a new service out of Madrid Spain into Sangster's International Airport.
- Eurowings to begin a non-stop service out of Cologne, Germany starting in the summer in to Sangster's International Airport.

Accommodations

- Royal Decameron Cornwall Beach consisting of 150 rooms was completed.
- Royalton Blue Waters opened with 225 rooms in Trelawny.
- Sandals Royal Caribbean began construction of five (5) "Over-the-Water" villas.
- Azul Sensatori in Negril began construction of 150 additional rooms.
- The former Grand Lido Negril resort has been demolished, to make grounds for the Royalton Branded resort.
- RIU Reggae opened with 450 rooms and 50 new rooms was added to RIU Palace.
- The 525 room Luxury Bahia Principe was completed.
- The former 51 room Coyaba resort has been renovated and re-opened under the new brand Zoetry.
- Construction began on the first phase of a two property resort by the Excellence Group, This 325 room Excellence Luxury Hotel in Oyster Bay, Trelawny, is expected to be completed by early 2018.
- The Renfrew - a 40 room 'Extended Stay Hotel' - is under construction and slated to be completed in the fall of 2017.

- In a departure from the all-inclusive concept, Sandals Resorts International has partnered with Marriott International to bring the lifestyle AC Hotels by Marriott brand to the Caribbean. Construction began on the 220 room AC Kingston hotel which is expected to be completed by 2019.
- The former Palmyra property was recently acquired and construction work is now in progress to complete the unfinished buildings; the 322 room resort will operate under the Jewel Brand and will be called Jewel Grande.

APPENDIX I

See Tables taken from the
Jamaica Tourist Board's Annual Travel Statistics for 2016
on the following pages

SUMMARY OF MAIN INDICATORS

	2015	2016	%Change 2016/2015
TOTAL STOPOVERS	<u>2,123,042</u>	<u>2,181,684</u>	<u>2.8</u>
Foreign Nationals	1,973,217	2,020,381	2.4
Non-Resident Jamaicans	149,825	161,303	7.7
<u>MARKET REGION</u>	<u>2,123,042</u>	<u>2,181,684</u>	<u>2.8</u>
From U.S.A.	1,344,149	1,406,058	4.6
Canada	391,409	372,137	-4.9
Europe	279,332	294,709	5.5
Caribbean	62,612	65,592	4.8
Latin America	29,387	27,726	-5.7
Asia & Pacific	9,238	8,949	-3.1
Other Countries	6,915	6,513	-5.8
<u>CRUISE SHIP PASSENGERS</u>	<u>1,568,702</u>	<u>1,655,565</u>	<u>5.5</u>
<u>TOURIST ACCOMMODATION</u>	<u>28,408</u>	<u>30,402</u>	<u>7.0</u>
Hotel Rooms *	<u>21,454</u>	<u>22,912</u>	<u>6.8</u>
All-Inclusive	16,360	17,834	9.0
Non All-Inclusive	5,094	5,078	-0.3
Other Rooms	<u>6,954</u>	<u>7,490</u>	<u>7.7</u>
Guesthouses	3,396	3,737	10.0
Resort Villas & Cottages	2,944	3,074	4.4
Apartments	614	679	10.6
Hotel Room Nights Sold	4,783,862	4,818,611	0.7
Average Hotel Room Nights Available	6,936,825	7,518,372	8.4
Average Hotel Room Occupancy	<u>69.0</u>	<u>64.1</u>	<u>-7.1</u>
All-Inclusive Hotels	75.8	70.4	-7.1
Non All-Inclusive	45.3	38.2	-15.7
<u>AVERAGE LENGTH OF STAY</u>			
Foreign Nationals	8.8	8.8	0.0
Non-Resident Jamaicans	16.4	16.8	2.4
<u>VISITOR EXPENDITURE (US\$ MILLION)**</u>	<u>2,402</u>	<u>2,609</u>	<u>8.6</u>
Stopovers	2,265	2,459	8.6
Cruise Passengers	137	150	8.9
<u>EMPLOYMENT IN ACCOMMODATION SECTOR</u>	<u>39,255</u>	<u>46,972</u>	<u>19.7</u>

* Excluding Closed Rooms

TABLE 1
VISITOR ARRIVALS TO JAMAICA
2002 - 2016

	STOPOVERS	CRUISE PASSENGERS ¹
2002	1,266,366	866,226
2003	1,350,285	1,133,411
2004	1,414,786	1,102,510
2005	1,478,663	1,137,250
2006	1,678,905	1,337,993
2007	1,700,785	1,180,733
2008	1,767,271	1,093,273
2009	1,831,097	923,234
2010	1,921,678	909,976
2011	1,951,752	1,127,012
2012	1,986,085	1,320,547
2013	2,008,409	1,265,693
2014	2,080,181	1,424,047
2015	2,123,042	1,569,342
2016	2,181,684	1,656,151

¹ Includes Armed Forces on Navel Vessels

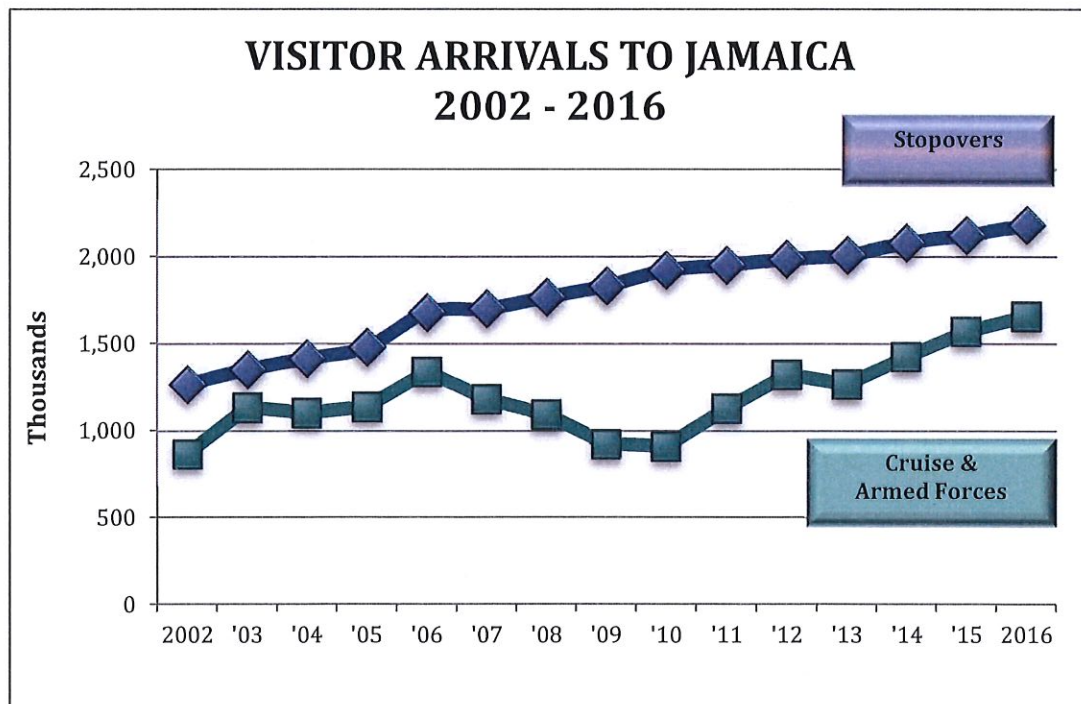
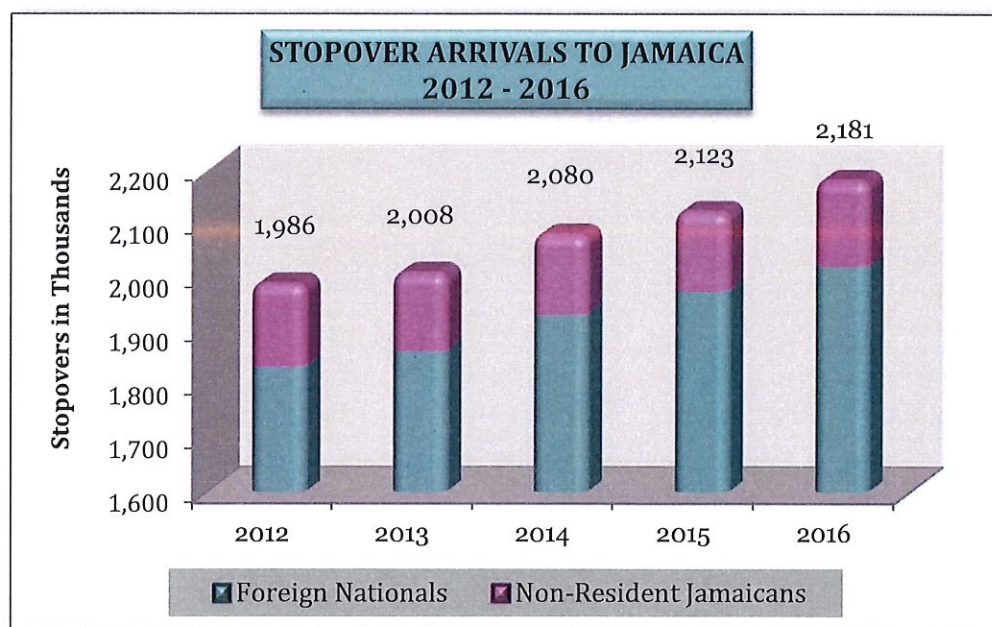


Fig. 1

TABLE 2**TOTAL STOPOVER ARRIVALS BY MONTH: 2012 - 2016**

	2012	2013	2014	2015	2016
January	169,355	161,455	169,280	176,621	179,559
February	180,595	166,010	169,328	177,805	185,272
March	204,724	213,109	200,732	212,134	219,673
April	180,511	171,630	181,664	189,903	188,604
Jan.-Apr.	735,185	712,204	721,004	756,463	773,108
May	157,233	160,785	166,249	168,347	167,884
June	179,814	186,481	187,083	182,364	194,088
July	209,824	205,655	221,006	220,662	228,169
August	157,863	164,336	171,486	169,063	169,023
September	104,360	105,426	106,757	114,280	120,340
October	111,253	123,663	135,730	134,317	135,467
November	138,395	148,512	157,737	158,450	163,152
December	192,158	201,347	213,129	219,096	230,453
May - Dec.	1,250,900	1,296,205	1,359,177	1,366,579	1,408,576
Jan. - Dec.	1,986,085	2,008,409	2,080,181	2,123,042	2,181,684
% Inc./Dec.	1.8	1.1	3.6	2.1	2.8

**Fig. 2**

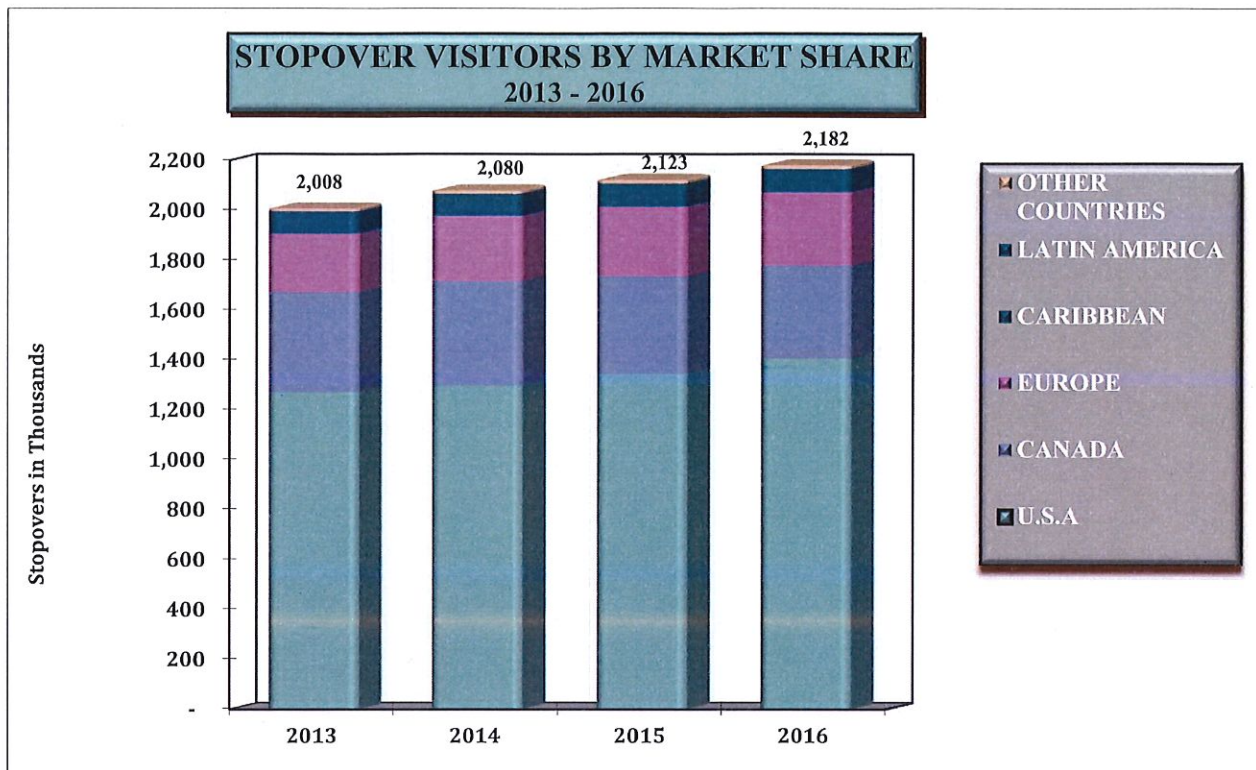


Fig. 4

Countries	Stopovers in Thousands								%Change 2016/15
	2013	%Share	2014	%Share	2015	%Share	2016	%Share	
U.S.A.	1,271.3	63.3	1,296.5	62.3	1,344.1	63.3	1,406.1	64.4	4.6
Canada	399.3	19.9	419.9	20.2	391.4	18.4	372.1	17.1	-4.9
Europe	235.8	11.7	261.1	12.6	279.3	13.2	294.7	13.5	5.5
Caribbean	58.2	2.9	59.1	2.8	62.6	2.9	65.6	3.0	4.8
Latin America	30.5	1.5	29.3	1.4	29.4	1.4	27.7	1.3	-5.7
Other Countries	13.2	0.7	14.4	0.7	16.2	0.8	15.5	0.7	-4.3
Total	2,008.4	100.0	2,080.2	100.0	2,123.0	100.0	2,181.7	100.0	2.8

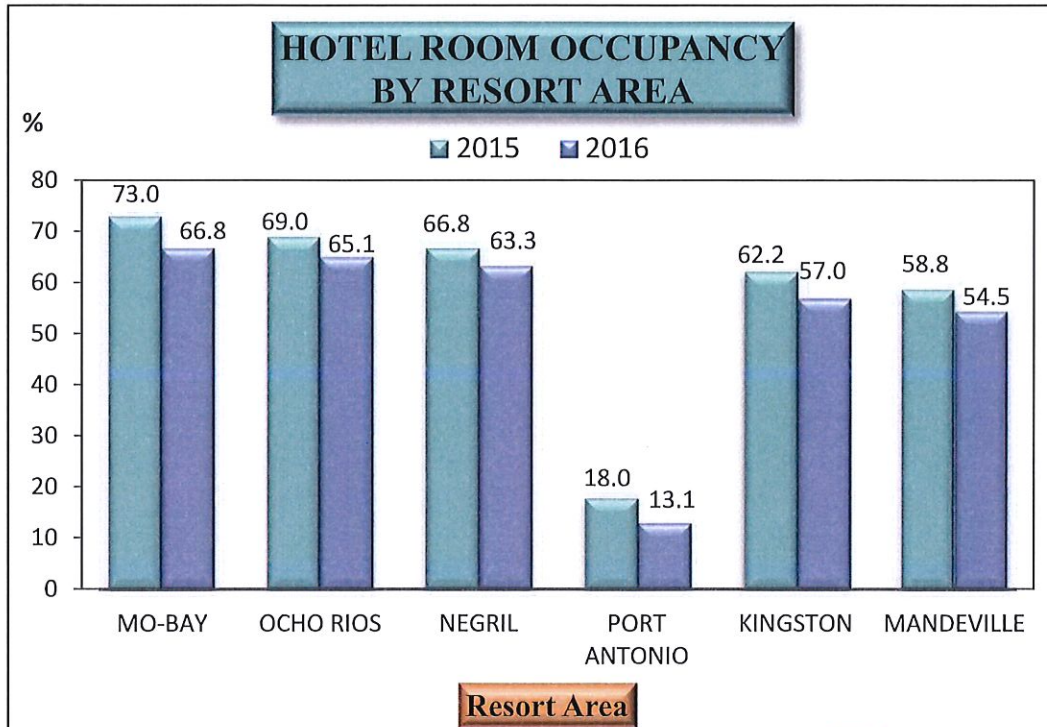


Fig.14

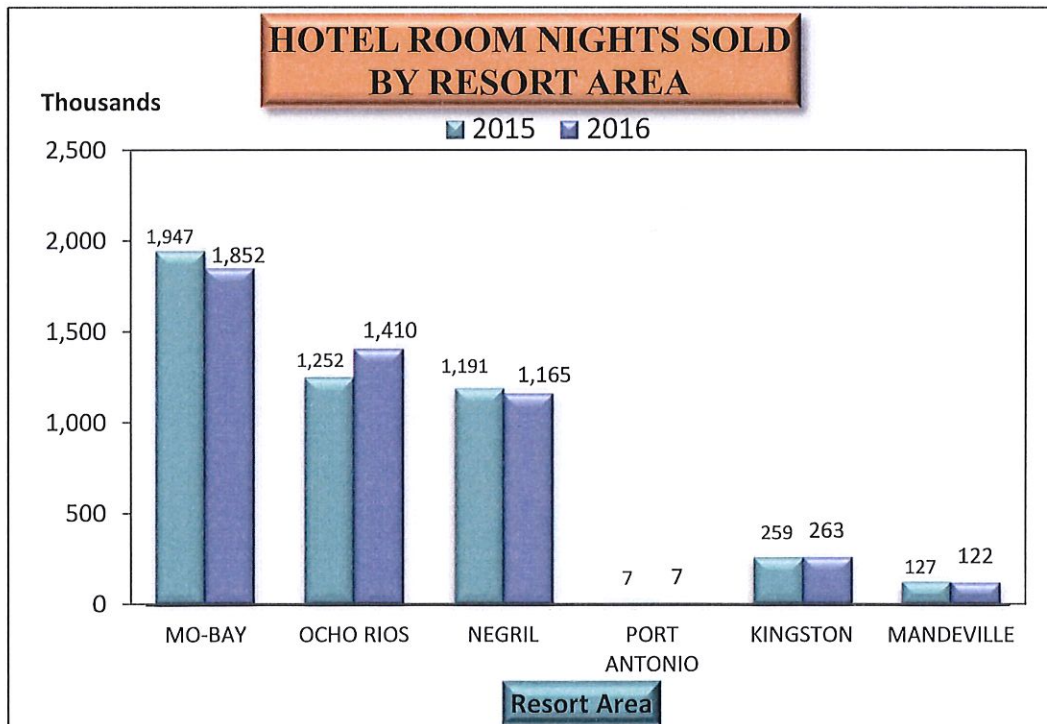


Fig.14a

TABLE 27**EMPLOYMENT IN ACCOMMODATION SECTOR**

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

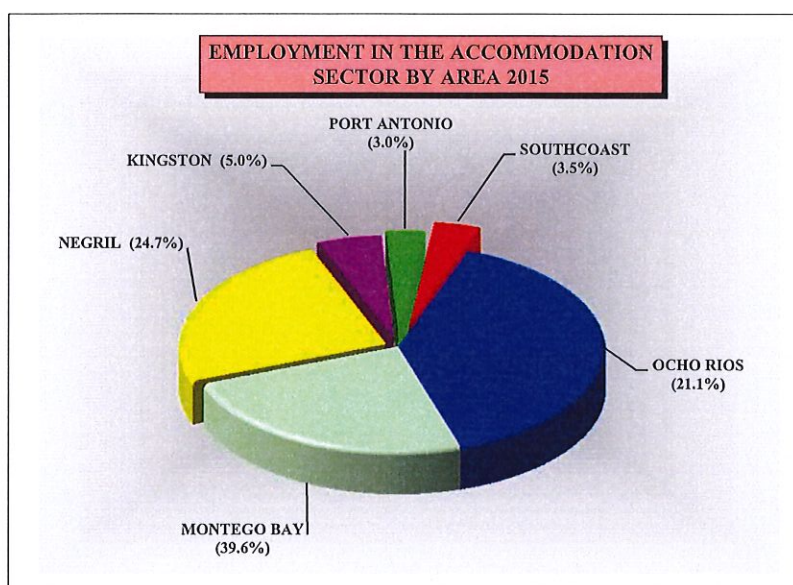
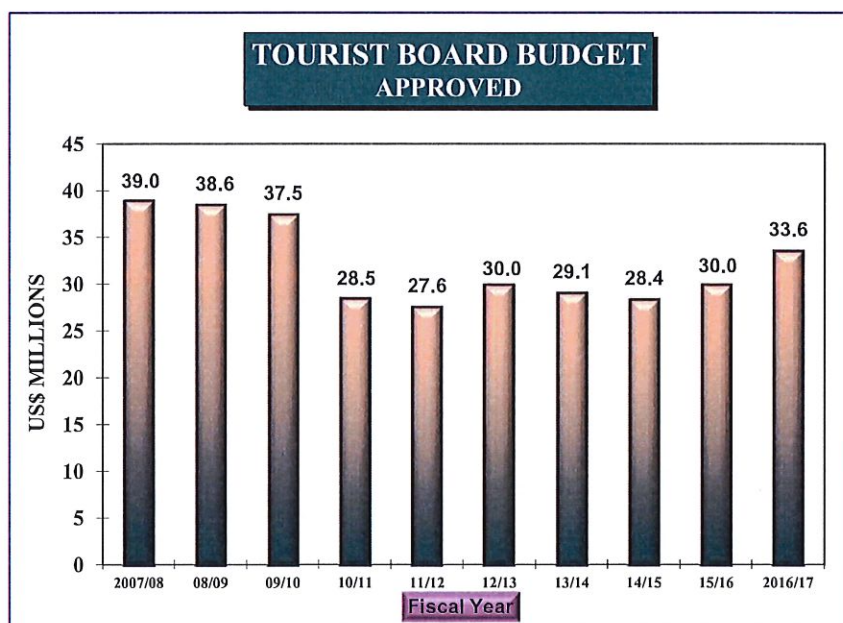
**Fig. 20**

TABLE 28**TOURIST BOARD BUDGET**

	APPROVED	
	J\$,000	US\$,000
1995/96	1,154,037	30,189
1996/97	1,208,713	33,905
1997/98	1,254,860	35,428
1998/99	1,189,116	32,138
1999/00	1,535,950	38,351
2000/01	1,378,430	34,098
2001/02	1,951,764	41,527
2002/03	1,671,751	34,828
2003/04	1,487,926	29,759
2004/05	1,648,176	25,753
2005/06	1,905,380	30,244
2006/07	2,190,759	33,193
2007/08	2,594,236	39,011
2008/09	2,737,796	38,561
2009/10	3,113,302	37,523
2010/11	2,568,510	28,539
2011/12	2,401,040	27,598
2012/13	2,610,941	30,011
2013/14	2,823,516	29,108
2014/15	3,066,662	28,395
2015/16	3,387,418	30,017
2016/17	4,101,884	33,622

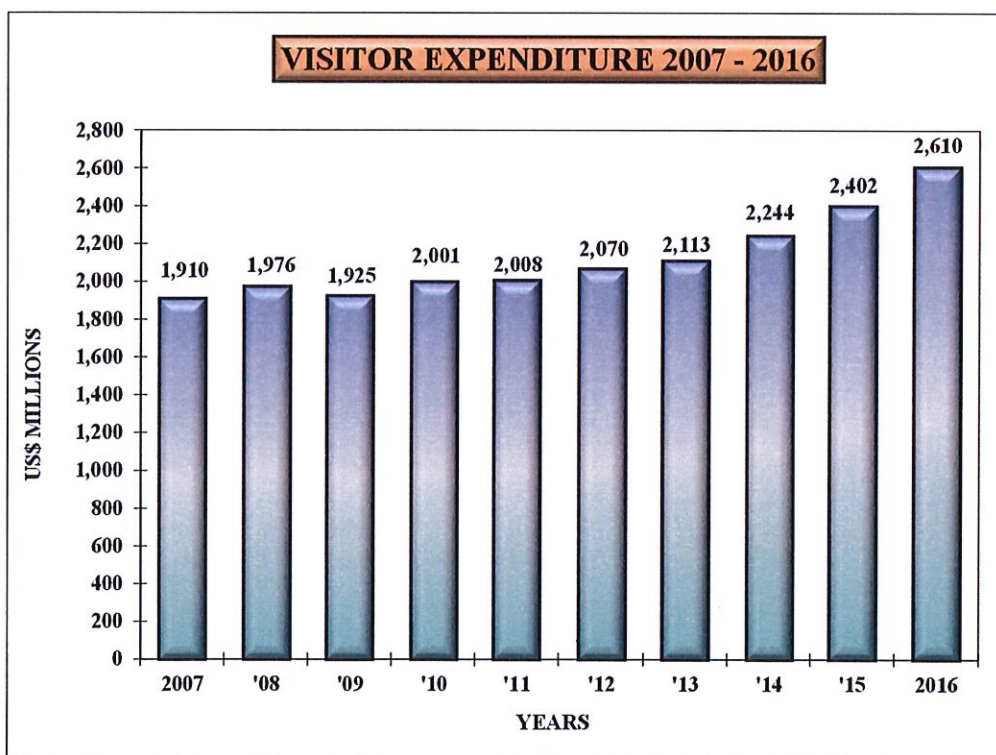
**Fig. 21**

- 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 2016/17 US\$1 = J\$122.00
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**

		**	
		J\$,000	US\$,000
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	2,244,443
2015		281,818,505	2,402,340
2016		326,563,967	2,609,589

** 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

Opinion

We have audited the financial statements of Jamaica Tourist Board ("the Board"), set out on pages 4 to 22, which comprise the statement of financial position as at March 31, 2017, the statements of profit or loss and other comprehensive income, changes in reserves and cash flows for the year then ended, and notes, comprising significant accounting policies and other explanatory information.

In our opinion, the accompanying financial statements give a true and fair view of the financial position of the Board as at March 31, 2017, and of its financial performance and its cash flows for the year then ended in accordance with International Financial Reporting Standards (IFRS).

Basis for Opinion

We conducted our audit in accordance with International Standards on Auditing (ISAs). Our responsibilities under those standards are further described in the *Auditors' Responsibilities for the Audit of the Financial Statements* section of our report. We are independent of the Board in accordance with the International Ethics Standards Board for Accountants Code of Ethics for Professional Accountants (IESBA Code), and we have fulfilled our other ethical responsibilities in accordance with the IESBA Code. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.



Page 2

INDEPENDENT AUDITORS' REPORT (CONT'D)

To the Board of Management
JAMAICA TOURIST BOARD

Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation of financial statements that give a true and fair view in accordance with IFRS, 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.

In preparing the financial statements, management is responsible for assessing the Board's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Board or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Board's financial reporting process.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with ISAs, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.



Page 3

INDEPENDENT AUDITORS' REPORT (CONT'D)

To the Board of Management
JAMAICA TOURIST BOARD

Auditors' Responsibilities for the Audit of the Financial Statements (Cont'd)

- Obtain an understanding of internal control relevant to the audit 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 Board's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Board's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditors' report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditors' report. However, future events or conditions may cause the Board to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

KPMG

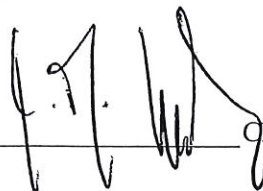
CHARTERED ACCOUNTANTS
Kingston, Jamaica

May 15, 2018

JAMAICA TOURIST BOARDStatement of Financial Position
March 31, 2017

	<u>Notes</u>	<u>2017</u> \$'000	<u>2016</u> \$'000
CURRENT ASSETS			
Cash and cash equivalents	3	439,473	189,254
Accounts receivable	4	<u>46,081</u>	<u>34,066</u>
		<u>485,554</u>	<u>223,320</u>
CURRENT LIABILITY			
Trade and other payables	5	<u>307,718</u>	<u>306,956</u>
NET CURRENT ASSETS/(LIABILITY)		177,836	(83,636)
NON-CURRENT ASSET			
Property, plant and equipment	6	<u>14,475</u>	<u>4,906</u>
		<u>192,311</u>	<u>(78,730)</u>
Financed by:			
RESERVES			
Surplus from Tourism Trade Development Board		19	19
Capital expenditure fund	7	14,475	4,906
Accumulated surplus/(deficit)		<u>177,817</u>	<u>(83,655)</u>
		<u>192,311</u>	<u>(78,730)</u>

The financial statements on pages 4 to 22 were approved by the Board of Management on May 15, 2018 and signed on its behalf by:



John Lynch Chairman of the Board



Donovan White Director of Tourism

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

JAMAICA TOURIST BOARDStatement of Profit or Loss and Other Comprehensive Income
Year ended March 31, 2017

	<u>Notes</u>	<u>2017</u> \$'000	<u>2016</u> \$'000
Government Grants:			
Ministry of Tourism		1,145,530	1,050,458
Caribbean Tourism Organisation (CTO)		25,631	25,631
Tourism Enhancement Fund (TEF)	9	2,982,789	2,426,824
Sports Tourism		<u>49,777</u>	<u>37,827</u>
		<u>4,203,727</u>	<u>3,540,740</u>
Less: Grants used for capital expenditure		<u>15,673</u>	<u>2,621</u>
Amount available for operational expenditure		<u>4,188,054</u>	<u>3,538,119</u>
Operational expenditure:			
United States of America		615,703	533,456
Canada		151,366	114,730
Germany		95,255	67,426
Deputy Director – United Kingdom/Europe		122,019	123,633
Overseas advertising		1,750,238	1,520,610
Overseas public relations		202,820	210,869
Overseas special projects		233,922	145,344
Familiarisation tours		1,184	4,167
Marketing representatives		84,772	88,251
Membership – International Organisation		<u>29,002</u>	<u>27,225</u>
Balance carried forward		<u>3,286,281</u>	<u>2,835,711</u>

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

JAMAICA TOURIST BOARDStatement of Profit or Loss and Other Comprehensive Income (Continued)
Year ended March 31, 2017

	<u>2017</u> \$'000	<u>2016</u> \$'000
Operational expenditure:		
Balance brought forward	<u>3,286,281</u>	<u>2,835,711</u>
Local offices expenditure:		
Executive office		
- Director emoluments	21,046	19,069
- Director of Tourism Department	46,285	29,680
Destination marketing	124,258	105,403
Corporate services	272,560	227,867
Finance and administration		
- Director fees	1,452	857
- Auditors' remuneration	1,406	1,300
- Other	69,507	68,551
Internal audit	10,248	9,320
Sports tourism	37,446	36,424
General manager – regional offices	77,099	69,514
Cruise, marine & attractions	<u>35,665</u>	<u>24,953</u>
	<u>696,972</u>	<u>592,938</u>
TOTAL EXPENDITURE	<u>3,983,253</u>	<u>3,428,649</u>
Other income:		
Interest income	816	580
Foreign exchange gain	12,264	1,604
Miscellaneous income	<u>43,591</u>	<u>25,182</u>
	<u>56,671</u>	<u>27,366</u>
Surplus for the year, being total comprehensive income	<u><u>261,472</u></u>	<u><u>136,836</u></u>

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

JAMAICA TOURIST BOARD

Statement of Changes in Reserves
Year ended March 31, 2017

	Surplus from Tourism Trade Development Board \$'000	Capital expenditure fund \$'000 (note 7)	Accumulated (deficit)/surplus \$'000	Total \$'000
Balances at March 31, 2015	19	6,889	(220,491)	(213,583)
Net capital expenditure	-	(1,983)	-	(1,983)
Total surplus recognised in 2016	<u>-</u>	<u>-</u>	<u>136,836</u>	<u>136,836</u>
Balances at March 31, 2016	19	4,906	(83,655)	(78,730)
Net capital expenditure	-	9,569	-	9,569
Total surplus recognised in 2017	<u>-</u>	<u>-</u>	<u>261,472</u>	<u>261,472</u>
Balances at March 31, 2017	<u>19</u>	<u>14,475</u>	<u>177,817</u>	<u>192,311</u>

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

JAMAICA TOURIST BOARDStatement of Cash Flows
Year ended March 31, 2017

	<u>Notes</u>	<u>2017</u> \$'000	<u>2016</u> \$'000
CASH FLOW FROM OPERATING ACTIVITIES:			
Surplus for the year		261,472	136,836
Adjustments to reconcile surplus for year to net cash provided by operating activities:			
Interest income		(816)	(580)
Depreciation	6	6,104	4,604
Foreign exchange gains		(12,264)	(1,604)
		254,496	139,256
Changes in:			
Accounts receivable		(12,015)	(19,369)
Trade and other payables		762	(65,126)
Net cash provided by operating activities		<u>243,243</u>	<u>54,761</u>
CASH FLOWS FROM INVESTING ACTIVITIES			
Acquisition of property, plant and equipment	6	(15,673)	(2,621)
Interest received		816	580
Net cash used by investing activities		(14,857)	(2,041)
CASH FLOWS FROM FINANCING ACTIVITY			
Capital expenditure fund, being net cash generated/(used) by financing activity		9,569	(1,983)
Net increase in cash and cash equivalents		237,955	50,737
Effect on foreign exchange rate changes		12,264	1,604
Cash and cash equivalents at beginning of the year		<u>189,254</u>	<u>136,913</u>
Cash and cash equivalents at end of the year	3	<u>439,473</u>	<u>189,254</u>

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements March 31, 2017

1. Identification

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

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

The Board’s employees aggregated 136 persons at March 31, 2017 (2016: 148).

2. 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 amended standards that became effective during the year:

Certain new and amended standards 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 and amended standards that are in issue but not yet effective:

Certain new standards and amended standards 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 and amendments 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, 2017

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

(a) Statement of compliance (continued):

New and amended standards that are in issue but not yet effective (continued):

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

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

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

- IFRS 16, *Leases*, which is effective for annual reporting periods beginning on or after January 1, 2019, eliminates the current dual accounting model for lessees, which distinguishes between on-balance sheet finance leases and off-balance sheet operating leases. Instead, there is a single, on-balance sheet accounting model that is similar to current finance lease accounting. Entities will be required to bring all major leases on-balance sheet, recognising new assets and liabilities. The on-balance sheet liability will attract interest; the total lease expense will be higher in the early years of a lease even if a lease has fixed regular cash rentals. Optional lessee exemption will apply to short-term leases and for low-value items with value of US\$5,000 or less.

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

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

- Amendments to IAS 7, *Statement of Cash Flows*, effective for accounting periods beginning on or after January 1, 2017, requires an entity to provide disclosures that enable users of financial statements to evaluate changes in liabilities arising from financing activities, including both changes arising from cash flows and non-cash flows.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2017

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

(a) Statement of compliance (continued):

New and amended standards that are in issue but not yet effective (continued):

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

(b) Basis of measurement and functional currency:

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

(c) Estimates and judgements:

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

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

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

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

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

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2017

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

(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, and are measured at amortised cost.

(e) Accounts receivable:

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

(f) Trade and other payables:

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

(g) Property, plant and equipment:

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

(h) Depreciation:

Property, plant and 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 and equipment	10% - 20%
Motor vehicles	20%

(i) Provisions:

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

(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.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2017

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

(j) Impairment (continued):

(i) Calculation of recoverable amount:

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

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

(ii) Reversals of impairment:

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

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

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

(k) Income:

Government grants are recognised when received or deemed received.

(l) Interest income:

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

(m) Related parties:

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").

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2017

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

(m) Related parties (continued):

- (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).
 - (viii) The entity or any member of a group of which it is a part, provides key management personnel services to the reporting entity, or the parent of the entity.
- (c) A related party transaction is a transfer of resources, services or obligations between related parties, regardless of whether a price is charged.

(n) Foreign currencies:

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

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)
March 31, 20172. Basis of preparation and significant accounting policies (continued)

(n) Foreign currencies (continued):

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.

(o) 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, accounts receivables and financial liability comprise trade and other payables.

3. Cash and cash equivalents

	<u>2017</u> \$'000	<u>2016</u> \$'000
Cash at bank	433,387	183,658
Imprest accounts	<u>6,086</u>	<u>5,596</u>
	<u>439,473</u>	<u>189,254</u>

4. Accounts receivable

	<u>2017</u> \$'000	<u>2016</u> \$'000
Trade receivables:		
Office of the Prime Minister	150	-
Accountant General Department	-	17,250
Ministry of Tourism	2,771	1,456
Tourism Enhancement Fund	31,972	-
Tourism Product Development Company Limited	537	308
Jamaica Vacations Limited	-	40
Executive employees and Directors	<u>114</u>	<u>29</u>
	35,544	19,083
Less: Allowance for impairment	(<u>196</u>)	(<u>196</u>)
	<u>35,348</u>	<u>18,887</u>
Other receivables:		
Prepayments and deferred expenses	5,124	9,565
Staff computer loans	14	268
Others	<u>5,595</u>	<u>5,346</u>
	<u>10,733</u>	<u>15,179</u>
	<u>46,081</u>	<u>34,066</u>

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)
March 31, 20174. Accounts receivable (continued)

The aging of trade receivables at the reporting date was:

	<u>2017</u>		<u>2016</u>	
	<u>Gross</u>	<u>Impairment</u>	<u>Gross</u>	<u>Impairment</u>
	<u>\$'000</u>	<u>\$'000</u>	<u>\$'000</u>	<u>\$'000</u>
Not past due	32,332	-	17,339	-
Past due 31-60 days	294	-	50	-
Past due 61-90 days	279	-	77	-
Past due over 90 days	<u>2,639</u>	<u>196</u>	<u>1,617</u>	<u>196</u>
	<u>35,544</u>	<u>196</u>	<u>19,083</u>	<u>196</u>

Based on experience management believes that no impairment allowance is necessary in respect of trade receivables not past due. No significant impairment loss was recognised in regards to an individual customer.

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

	<u>2017</u>	<u>2016</u>
	<u>\$'000</u>	<u>\$'000</u>
Balance at beginning of the year	196	5,144
Bad debt written off	<u>-</u>	<u>(4,948)</u>
Balance at the end of the year	<u>196</u>	<u>196</u>

5. Trade and other payables

	<u>2017</u>	<u>2016</u>
	<u>\$'000</u>	<u>\$'000</u>
Trade payables	167,015	163,199
Accrued charges	138,301	143,309
Other	<u>2,402</u>	<u>448</u>
	<u>307,718</u>	<u>306,956</u>

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)
March 31, 20176. Property, plant and equipment

	Freehold land and buildings \$'000	Furniture, fixtures and equipment \$'000	Motor vehicle \$'000	Total \$'000
Cost:				
March 31, 2015	294	118,589	9,022	127,905
Additions	-	2,621	-	2,621
March 31, 2016	294	121,210	9,022	130,526
Additions	-	11,376	4,297	15,673
March 31, 2017	294	132,586	13,319	146,199
Depreciation:				
March 31, 2015	269	116,508	4,239	121,016
Charge for the year	-	3,501	1,103	4,604
March 31, 2016	269	120,009	5,342	125,620
Charge for the year	-	4,256	1,848	6,104
March 31, 2017	269	124,265	7,190	131,724
Net book values:				
March 31, 2017	25	8,321	6,129	14,475
March 31, 2016	25	1,201	3,680	4,906

Freehold land and buildings include freehold land at a cost of \$25,000 (2016: \$25,000).

7. Capital expenditure fund

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

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)
March 31, 20178. Staff cost

	<u>2017</u> \$'000	<u>2016</u> \$'000
Overseas:		
United States of America	316,268	209,449
Canada	75,949	58,636
Germany	23,879	22,318
Deputy – United Kingdom, Europe and Far East	<u>60,535</u>	<u>48,195</u>
	<u>476,631</u>	<u>338,598</u>
Local:		
Executive office – Director of Tourism	48,039	36,907
Destination marketing	86,571	85,889
Corporate services	182,474	138,178
Finance and Administration	40,708	41,948
Internal audit	9,900	8,580
Cruise, Marine and Attractions	15,454	17,935
General Manager – Regional offices	53,247	50,198
Sports tourism	<u>4,764</u>	<u>3,821</u>
	<u>441,157</u>	<u>383,456</u>
	<u>917,788</u>	<u>722,054</u>

9. Tourism Enhancement Fund

The Jamaica Tourist Board received funding from the Tourism Enhancement Fund (TEF) in the amount of \$2,982,789,581 (2016: \$2,426,824,439). These funds were used to assist in the Board's advertising and special projects expenses and include:

	<u>2017</u> \$'000	<u>2016</u> \$'000
Advertising/marketing activities:		
Winter advertising	2,547,017	2,373,663
Tourism outlook seminar	8,400	-
Formic 2016 sponsorship	-	5,998
Overseas salaries and allowances	250,865	-
Taste of the Caribbean	-	3,660
Tourism awareness week	-	2,000
Jamaica House Rio 2016	89,809	-
Rescue Plan for Canada	54,400	-
Cruise Marketing – November 2016-March 2017	17,091	-
IAF World Athletic Champion	-	11,737
International Hotel Investment Forum	2,365	-
Caribbean Premier League Cricket Campion	-	8,821
Tui UK Cruise Support Agreement	<u>12,842</u>	<u>20,945</u>
	<u>2,982,789</u>	<u>2,426,824</u>

JAMAICA TOURIST BOARDNotes to the Financial Statements (Continued)
March 31, 201710. Taxation

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

11. Pension scheme

Overseas pension scheme:

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

Local pension scheme:

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

12. Related party balances and transactions

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

	<u>2017</u> \$'000	<u>2016</u> \$'000
Accounts receivable (trade receivables):		
Accountant General Department	-	17,250
Ministry of Tourism	2,771	1,456
Tourism Product Development Company Limited	537	309
Jamaican Vacation Limited	-	40
Executive employees	40	29
Tourism Enhancement Fund	31,972	-
Office of the Prime Minister	150	-
Directors	<u>74</u>	<u>-</u>
	<u>35,544</u>	<u>19,084</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>2017</u> \$'000	<u>2016</u> \$'000
Income:		
Ministry of Tourism (including C.T.O marketing grant)	1,171,161	1,076,089
Tourism Enhancement Fund (including sports tourism grant)	<u>3,032,566</u>	<u>2,464,651</u>
	<u>4,203,727</u>	<u>3,540,740</u>

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2017

13. Financial instruments

Financial instrument risk:

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

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

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

(i) Credit risk:

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

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

Cash and cash equivalents:

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

Trade receivables:

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

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

(ii) Market rate risk:

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

- Interest rate risk:

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued)
March 31, 2017

13. Financial instruments (continued)

Financial instrument risk (continued):

(ii) Market rate risk (continued):

- Interest rate risk (continued):

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

- Foreign currency risk:

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

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

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

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

	Net foreign currency (liabilities)/assets 2017				Net foreign currency (liabilities)/assets 2016			
	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000
Cash and cash equivalents	32	2,821	57	108	89	512	129	49
Accounts receivable	-	47	-	-	-	25	9	-
Accounts payable	(44)	(1,771)	(85)	(192)	(164)	(412)	(61)	(168)
	(12)	1,097	(28)	(84)	(75)	125	77	(119)

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

	<u>USD</u>	<u>EURO</u>	<u>GBP</u>	<u>CDN</u>
March 31, 2017:	128.67	137.84	159.57	97.17
March 31, 2016:	121.36	138.50	172.00	92.52

A 6% (2016: 6%) strengthening of the above currencies against the Jamaica dollar would have increased surplus for the year by \$7,612,000 (2016 increased surplus by: \$414,448).

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Continued) March 31, 2017

13. Financial instruments (continued)

Financial instrument risk (continued):

(ii) Market rate risk (continued):

- Foreign currency risk (continued):

A 1% (2016: 1%) weakening of the above currencies against the Jamaica dollar would have decreased surplus for the year by \$1,269,000 (2016 decreased surplus by: \$69,075).

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

(iii) Liquidity risk:

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

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

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.

Financial instrument

Method

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

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

APPENDIX III

JAMAICA TOURIST BOARD SENIOR EXECUTIVES COMPENSATION									
LOCAL OFFICES									
POSITION OF SENIOR EXECUTIVE		YEAR	SALARY	GRATUITY/ PERFORMANCE INCENTIVE	TRAVELLING/ VALUE OF ASSIGNED CAR	PENSION	OTHER ALLOWANCES	NON-CASH BENEFITS	TOTAL
			\$	\$	\$	\$	\$	\$	\$
Director of Tourism (Contract)		2016/17	15,836,620.84	Gratuity	5,519,313.30	No		120,000.00	15,956,620.84
D/Director - Marketing (Contract)		2016/17	5,516,679.96	Grat./Perf. Incentive	1,341,624.00	No	949,999.92		6,466,679.88
D/Director - Cruise, Events & Attractions		2016/17	3,008,057.24	Perform. Incentive	603,118.19	Yes	464,838.26		3,472,895.50
Head, Corporate Services (Contract)		2016/17	5,002,317.91	Grat./Perf. Incentive	1,341,624.00	No			5,002,317.91
Chief Financial Officer 1 (Contract)		2016/17	4,359,654.44	Grat./Perf. Incentive	1,341,624.00	No	723,525.96		5,083,180.40
Regional Director - Jamaica (Contract)		2016/17	5,133,187.09	Grat./Perf. Incentive	1,341,624.00	No			5,133,187.09
Senior, Manager Information Systems		2016/17	6,045,522.22	Grat./Perf. Incentive	1,341,624.00	No			6,045,522.22
OVERSEAS OFFICES			US\$		US\$		US\$	US\$	US\$
POSITION OF SENIOR EXECUTIVE									
Deputy Director-USA		2016/17	85,057.00	Performance Incentive	9,444.00	Yes	64,852	47,468	206,821.00
		Can\$	Can\$		Can\$		Can\$	Can\$	Can\$
Regional Director-Canada		2016/17	106,797.00	Performance Incentive	13,212.00	Yes	82,698	26,134	228,841.00
			£		£		£	£	£
Regional Director-UK		2016/17	48,795	Performance Incentive	5,688.00	Yes	35,584	19,753	109,820.00
			€		€		€	€	€
Regional Director-Europe		2016/17	61,289.00	Performance Incentive	8,760	Yes	39,471	9,869	119,389.00

JAMAICA TOURIST BOARD
BOARD OF DIRECTORS COMPENSATION 2016-2017

	Position of Director	Fees	Travelling/Mileage	Honararia	Other Compensation	TOTAL
		\$	\$	\$	\$	
John Lynch	Chairman	218,000.00				218,000.00
Godfrey Dyer	Member	110,000.00				110,000.00
Josef Foestmayer	Member	88,888.00				88,888.00
Wayne Cummings	Member	77,000.00				77,000.00
Phillip Hofer	Member	99,000.00				99,000.00
Lionel Reid	Member	66,000.00	127,738.00			193,738.00
Paul Simpson	Member	44,000.00				44,000.00
Berth Wright	Member	169,000.00				169,000.00
Fred Smith	Member	165,000.00				165,000.00
Hyacinth Lightbourne	Member	206,500.00				206,500.00
Nicola Madden Greig	Member	154,000.00				154,000.00

Points to Note:

1. As Director of Tourism of Tourism, Mr. Paul Pennicook was not eligible to receive Director's Fees