



JAMAICA[®]
ONE LOVE

JAMAICA TOURIST BOARD
**ANNUAL
REPORT**

2018 - 2019



JAMAICA[®]
ONE LOVE

JAMAICA TOURIST BOARD

**ANNUAL REPORT
2018 - 2019**

Martha Brae River (Rafters Village), Trelawny
Photo Credit: Jamaica Tourist Board



TABLE OF CONTENTS

04	Our Vision	14	Board of Directors
05	Our Mission	18	Board Officers
06	About Us	19	Board of Directors and Board Sub-Committees
08	Minister's Message	20	Management Team - Local
09	Chairman's Message	22	Management Team - Global
10	Director's Message	24	Tourism Performance Summary 2018
12	Year in Review 2018 - 2019	27	2018 - 2019 Audited Financial Statements

JAMAICA[®]

ONE LOVE



Blue Lagoon, Port Antonio
Photo Credit: Jamaica Tourist Board

60	2018 - 2019 Jamaica Tourist Board Activities Worldwide	100	Highlights from the Marketplace
62	Advertising Activities Worldwide	113	Awards & Recognition
67	Public Relations	119	Product/Licensing
77	Sales Activities	120	Statistics
89	Performance in the Marketplace	125	Appendix 1 – Tables & Figures
95	On the Homefront	136	Appendix 2 – Compensation
		138	Jamaica Tourist Board Worldwide


JAMAICA[®]

ONE LOVE



OUR VISION

To be the most efficient public sector agency, committed to the creation of sustainable tourism development to provide a modern and fair regulatory framework and a great place to work.

A photograph of Emancipation Park in Kingston, Jamaica. The foreground shows a paved area with a circular stone feature. In the middle ground, a low wall with a colorful, abstract pattern is topped with the words "EMANCIPATION PARK" in large, gold letters. Behind the wall is a dense line of tropical trees, including palm trees. The sky is a clear, vibrant blue with a single bird in flight in the upper right.

"Redemption Song" by Laura Facey - Emancipation Park, Kingston
Photo Credit: Jamaica Tourist Board

OUR MISSION

To always position destination JAMAICA as the pre-eminent Caribbean tourist destination that delivers value for the People and Government of Jamaica and the tourism industry stakeholders.



ABOUT US

Founded in 1955, the Jamaica Tourist Board (JTB) is Jamaica's national tourism agency, with corporate offices in Kingston. JTB Regional Offices are located in Montego Bay, Miami, Toronto, London, and Berlin. Representative offices are located in Madrid, Milan, Amsterdam, New Delhi, Beijing and Tokyo.

JAMAICA[®]

ONE LOVE



Blue Mountains, Portland & St. Andrew
Photo Credit: Jamaica Tourist Board



MINISTER'S MESSAGE

THE HONOURABLE
EDMUND BARTLETT, CD, MP
Minister of Tourism

Travel and tourism contributed US\$8.8 trillion to the global economy in 2018. It was another year of strong growth and saw the sector reinforcing its role as a driver of economic growth and job creation. Travel and tourism grew at a rate of 3.9% and supported 319 million jobs worldwide.

In 2018, Jamaica experienced a record year for overall visitor arrivals. The destination welcomed 4.31 million combined cruise and stopover visitors. This was the second consecutive year that Jamaica had more than 4.3 million visitors in a calendar year. That included an 8.6% increase in tourism earnings, rising from US\$3 billion in 2017 to US\$3.3 billion in 2018.

By year end, Jamaica's tourism sector continued to grow and surpassed our projections, and figures at the start of 2019 were very impressive. This was due in large measure to the strong marketing efforts of our team across the globe.

The Ministry of Tourism is proud of the efforts which have been made toward the steady repositioning of tourism to ensure that there is greater

local retention of revenues, and will ensure that push continues in the new financial year.

Among these strategies are the continued push to develop and diversify our world-class tourism product; tap into new and diverse markets; while strategically leveraging technology, such as new media platforms, to compete more effectively in the fiercely competitive global marketplace.

The Ministry remains committed to creating an environment in which tourism can thrive in our country's national economic interest. Our continued efforts will seek to ensure inclusive, responsible and sustainable growth, which will be key to transforming this vibrant and pivotal industry. Working together, we can further grow the economy through tourism.

Edmund Bartlett, CD, MP
Minister of Tourism

CHAIRMAN'S MESSAGE

JOHN LYNCH, CD
Chairman of the Board



Tourism can be challenging, yet it is a very rewarding industry. Many of the factors that determine the success or failure of any local tourism sector rest outside the control of the players and stakeholders. Yet destination JAMAICA continues to shine. Onlookers are always amazed at our ability to excel amidst testing circumstances.

The truth is, we possess a world-class team that makes excellence their priority. And when I am asked the secret to our success, that really is the core of it - we continue to triumph because we do the work.

The Jamaica Tourist Board is at a pivotal place in its history and development, and as trendsetters, our tourism product is expanding to fulfil the desires of the evolving traveller. We have reaped innumerable successes, and in a dynamic industry such as ours, we have to remain relevant and highly visible.

During the financial year, Jamaica continued on a growth path, despite the on-going enhanced security measures; and took centre-stage in January as we successfully hosted

Caribbean Travel Marketplace 2019 in our tourism capital. It was during this year that we made a distinctive shift towards more use of technology. We launched *Join Me in Jamaica*, a digital campaign; and the relaunch of our marketing website provided all the necessary content management and serving capabilities required to support and expand destination JAMAICA's marketing initiatives.

In this digital centric era, these online initiatives have served to heighten the appeal and presence of the destination in the marketplace. We continue to punch above our weight as we stand shoulder to shoulder with the world's best, having more influence internationally than our small size suggests.

I am pleased with the trajectory of our local industry and look forward to even greater successes in the future.

A stylized, handwritten signature in black ink, consisting of several loops and a long horizontal stroke.

John D. Lynch, CD
Chairman of the Board of Directors



DIRECTOR'S MESSAGE

DONOVAN WHITE
Director of Tourism

The Jamaica Tourist Board (JTB) has begun a process of re-engineering itself and its methods of marketing and promoting destination JAMAICA to meet the needs of the emerging tourism global source markets. These markets include our neighbours in Latin America, Continental and Eastern Europe in the short- and medium-term. As we look further forward however, we see the widening and enrichment of the middle classes in South East Asia that has created a thirst for travel by the adventurous millennials looking for new experiences.

While we have singled out these key areas around the globe for expansion of the JTB's demand creation engine, we are equally and keenly focused on the legacy markets of the United States, United Kingdom and Canada that have continued to provide the destination with year-on-year growth consistently over time. Competitive forces demand that we must continue to diversify our product within the destination and meet our audiences where they go for information to communicate our many layers of differentiation.

The Jamaica Tourist Board is therefore now forced to compete for growth in a larger, more diverse marketplace, with more affluent and aurally connected destinations in every continent, that are using more pervasive technology and big data to shorten the communication gap with the end consumer. In this regard, we have begun to make changes at the JTB to embrace these global paradigm shifts.

To compete in this new global marketplace, our number one strategy this year is the development of a new, fully integrated website. This new, data rich, social media integrated digital platform will revolve on a single axis that provides global access to the destination 24/7/365.

This new website will host and promote all aspects of the destination and provide real-time access and content to tour operators and travel agents globally, to be more efficient in selling Jamaica.

JAMAICA[®]

ONE LOVE

The return on investment on this move to smart tourism will be the ability to market the destination and manage the distribution of our content in a more precise and geo-targeted way, to extract more value from our advertising and promotion than ever before. An example of this is the recently launched digital campaign, strictly on Facebook, themed *Join me in Jamaica*. On the first weekend, the campaign was tested online and in the first hour, the first post received 18,000 views, 100 shares, 75 comments and 250 likes. It was only targeted to Dade County, in the City of Miami. I invite each of you to take a look at these videos on the VisitJamaica Facebook page and see the quality of the work being done by the Jamaica Tourist Board.

This does not mean we will spend less on advertising, nor does it mean we will not buy traditional forms of advertising – no, because we must! However, it gives us the opportunity through the social media platforms that will be integrated to reach more eyeballs in more places that we could never afford to reach before.

While it is clear why the new website platform is our number one priority, the team is also re-structuring its global operations for greater efficiency. We are committed to training and development to optimise our sales strategy.

During the period, we also actively negotiated new gateways for inbound airlift capacity, completed the process of contracting a new international creative advertising agency, collaborated and partnered with the Tourism Linkages Council and Tourism Enhancement Fund to develop new products to continually reposition the destination experientially so that Jamaica can compete more effectively in new markets.



Donovan White
Director of Tourism

A man in blue shorts stands on a wooden pier, looking out at a tropical beach. A tall palm tree stands prominently on the right, its reflection visible in the calm water. The sky is a clear, vibrant blue with a few wispy clouds. The scene is captured in a way that emphasizes the beauty and tranquility of the location.

JAMAICA[®]

ONE LOVE

YEAR IN REVIEW

2018 - 2019

OVERVIEW



The Jamaica Tourist Board (JTB) continues to be on a mission to always position destination JAMAICA as the pre-eminent Caribbean tourism destination that delivers value for the People and Government of Jamaica and tourism industry stakeholders.

Total visitor arrivals for the year 2018 reached another record of 4,318,600, which was 1.0% above the 4,276,189 arrivals recorded in 2017. This figure represents 42,422 more arrivals than in 2017.

Earnings from tourism arrivals grew by 9.8% which contributed nearly 10% of total GDP. PIOJ announced that real GDP grew by an estimated 1.5% in the first three months of 2019 compared to the same period in 2018. As to the Impact of Tourism Revenues, Jamaica was poised to record the country's strongest economic growth in 12 years.

The continued strong performance of the economy coupled with the sustained growth of the tourism industry has encouraged foreign investor confidence which is reflected in the expansion of our room stock and air seat capacity. Over the next 3-5 years, an additional 12,000 rooms will be available.

Increased demand for local goods and services by the Tourism sector is being facilitated through the work of the Tourism Linkages Network.

The main factors that may be identified as having had an impact on Jamaica's stopover arrivals during 2018/2019 were:

- The Jamaica Tourist Board adjusted its advertising portfolio, which saw a greater emphasis placed on Digital Marketing.
- The advertising campaign *Join Me in Jamaica* was developed to show the authentic personas and experiences a visitor can have on island. It was a series of videos that included international artists, cultural attractions and artisans, among others, who helped to push and solidify the message of destination JAMAICA.

- Jamaica's destination website continued to be used as the primary "call to action" for advertisements and promotion. The website is a repository of destination activities, accommodations, and the unique elements that make the island appealing to the traveller. To better manage and coordinate content posted on the Board's social media platforms, regional Facebook pages were merged into the social media giant's global Facebook account 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.
- Maintaining adequate airlift from the major gateways within Jamaica's key tourism generating regions.
- A number of new and re-branded hotels opened in 2018, resulting in the availability of more rooms.
- On island travel agents' familiarisation 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 2018/2019. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations, unequalled visitor experiences and provide value for money.

Going forward, in the words of the Director of Tourism, "Our focus is Geo/Demo targeted in non-traditional source markets combined with an experiential, competitive and differentiated product suite to attract more visitors".

BOARD OF DIRECTORS



Mr. John Lynch, CD
Chairman of the Board

John Lynch is one of the Caribbean's most influential and sought-after experts who has brought worldwide attention, and ultimately visitors, to the region. For more than 30 years he has been a steady force for many of the Caribbean's most visible travel brands, including Jamaica; its former national airline, Air Jamaica, Ltd.; Sandals Resorts; Beaches Resorts; and the Royal Plantation group of luxury boutique resorts.

Mr. Lynch has held several senior management roles at the Jamaica Tourist Board, including Regional Manager and Deputy Director of Tourism. He subsequently assumed the post of President and CEO of Luxury Resorts Marketing, Ciboney Ocho Rios - A Radisson Resort, and Executive Vice-President of Sandals Resorts. Mr. Lynch also served as a member of the Board of Directors of Air Jamaica, Ltd., Third Vice-President of the Caribbean Hotel and Tourism Association (CHTA), and as Chairman of the influential marketing committee of the Caribbean Tourism Organisation. In October 2007, he was appointed Chairman of the Board, and in 2008, he was appointed Director of Tourism and served in that capacity until May 2014.

In August 2017, Mr. Lynch was invested with the Order of Distinction in the Rank of Commander, for sterling contribution to the development of the tourism industry in the Caribbean. He is currently the Chairman of the Montego Bay Convention Centre and serves on the Board of Jamaica Vacations Limited.



Mr. Donovan White
Director of Tourism

Mr. Donovan White was appointed Director of Tourism in February 2018, bringing to the Jamaica Tourist Board (JTB) over 20 years' experience as a senior executive in marketing and business development.

Since taking the helm, Mr. White has led a strategic positioning to ensure that the destination continued on its growth trajectory for arrivals, with Jamaica exceeding the four million mark for total visitor arrivals in 2018 and 2019. White has guided the implementation of several award-winning digital activations including Join Me in Jamaica and Escape to Jamaica. He spearheaded the launch of the destination's "Heartbeat of the World" campaign, strengthening Jamaica's position as a global culturally relevant brand.

Before joining the JTB, Mr. White was the Vice President of Cable & Wireless Business, Jamaica. He also served as Vice President, Marketing, Sales & Media Services at Columbus Communications Jamaica Limited (FLOW).

He serves on several public and private sector boards, including the Tourism Enhancement Fund, the Tourism Linkages Network and the School of Computing & Information Technology (The University of Technology), and is the current Chairman of the Consumer Affairs Commission.

Mr. White is a graduate of the University of New Orleans where he earned an undergraduate degree in Marketing, followed by an Executive MBA from the Telecoms Academy in the United Kingdom.



Mr. Wayne Cummings
Hotelier, Sandals Resorts International

Wayne Cummings is a 30-year hospitality professional and is the Group Commercial Director at Sandals Resorts International, with additional leadership responsibilities within the ATL Group of Companies.

His 12 years at the resort chain's corporate offices were preceded by a matching number of years as General Manager across several of the chain's luxury all-inclusive properties in Jamaica. For those roles and his current one, Mr. Cummings was eminently qualified by some of the world's best academic institutions, including the Caribbean Governance Training Institute, where he earned his Chartered Director designation; Ecole Hoteliere de Lausanne in Switzerland, where he pursued Applied Hospitality Management training; and Hocking College in the USA where he was trained in Hotel/Restaurant Management Technology.

A passionate tourism advocate, he is a Past President of the Jamaica Hotel and Tourist Association (2007-2011), and a Director of the Caribbean Hotel and Tourism Association. Mr. Cummings has also served as President of the Negril, Chamber of Commerce, the Private Sector Organization of Jamaica and the Tourism Enhancement Fund.



Mr. Godfrey Dyer* OJ, CD, JP
Tourism Consultant

The Honourable Godfrey G. Dyer is a stalwart in the tourism sector, having served in several leadership capacities for nearly half a century, including: Past President of the Jamaica Hotel and Tourist Association (JHTA), Montego Bay Co-op Credit Union, Montego Bay Chamber of Commerce and Industry, Associated Chambers of Commerce of Jamaica, and former Vice-President of the Private Sector Organisation of Jamaica. He also served on the Boards of the Jamaica Telephone Company, JAMPRO (Jamaica Trade and Invest), Jamaica Credit Union League, Caribbean Hotel and Tourist Association, Jamaica Pegasus Hotel and the Jamaica Tourist Board.

Mr. Dyer's achievements among others, include two National Awards, the Order of Jamaica and Order of Distinction in the Commander Rank, for exceptional contribution to Tourism. He was the recipient of the St. James Parish Award and The Prime Minister's Distinguished Award for Service in Tourism. He was named Hotelier of the Year in 2002 and in 2005, and bestowed with a Lifetime Achievement Award by the JHTA.

Mr. Dyer currently serves as Chairman of the Tourism Enhancement Fund, Director of the Montego Bay Convention Centre, AJAS Aviation Services, Bulwark Insurance Agency and as a Member of the UDC Advisory Council, Montego Bay.

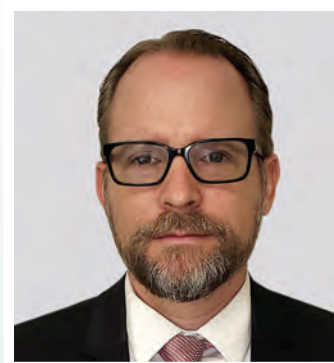


Mr. Josef Forstmayr, OD
Hotelier, Round Hill Hotel & Villas

Josef Forstmayr began welcoming guests to Round Hill Hotel and Villas as Managing Director in 1989. Prior to joining Round Hill, Josef held managerial positions at Coconut Cove in Negril, and Tryall Golf and Beach Hotel before assuming the post of General Manager at the Trident Villas and Hotel in Port Antonio.

Mr. Forstmayr was appointed President of the Caribbean Hotel & Tourism Association (CHTA) in April 2010. During his tenure from 2010 to 2012, Josef was an advocate for the importance of tourism throughout the Caribbean through the CHTA's *Tourism is Key* campaign. He also advocates for the industry to support local economies and to promote the Caribbean as the best warm weather destination in the western hemisphere.

He currently serves as Chairman of the Montego Bay Arts Council Limited (Montego Bay Cultural Centre). In 2005, he received The Order of Distinction in the Rank of Officer for his contribution to Jamaica's tourism industry. He was named Hotelier of the Year by the JHTA in 1993 and 1996, and Caribbean Hotelier of the Year by the Caribbean Hotel Association in 2007. Mr. Forstmayr attended the University of Salzburg where he studied Economic Sciences and Tourism. He is the Honorary Consul-General for the Republic of Austria in Jamaica.



Mr. Philipp Hofer
Hotelier, Iberostar Hotels & Resorts

Philipp Hofer has over 25 years in the hospitality industry, including 18 years with IBEROSTAR.

A native of Austria, Mr. Hofer studied at the School of Tourism and Business Administration in Klessheim and has continuously updated his education throughout his career. His first role at IBEROSTAR was in the Guest Services department at IBEROSTAR Quetzal and IBEROSTAR Tucán in México. Since then, he has held management positions in eight IBEROSTAR resorts throughout Mexico and Cuba.

For the past ten years, Mr. Hofer has had a key role in IBEROSTAR's expansion into Jamaica, where he now serves as the Director of Operations for IBEROSTAR properties in Jamaica and Aruba. His warm managerial style, proactive approach, and commitment to exceeding guests' expectations have contributed greatly to IBEROSTAR's success.

Mr. Hofer is also a member of the JTB's Human Resources Board Sub-committee.

*Resigned from the Board of Directors, May 2018.

BOARD OF DIRECTORS cont't.



Ms. Hyacinth Lightbourne
Attorney-at-Law

Hyacinth 'Cindy' Lightbourne specialises in complex commercial litigation matters (including Banking and Finance, and Insolvency), Defamation, Personal Injury, and Intellectual Property Litigation. She has appeared both as Counsel and as an Instructing Attorney instructing Queen's Counsel in complex litigation matters before the Supreme Court of Judicature of Jamaica and the Court of Appeal of Jamaica.

Experienced in conducting complex fraud litigation involving international organisations, she has also appeared in various court-ordered mediations and advised and prepared opinions for major Jamaican financial and manufacturing institutions, media houses, insurers, statutory bodies and hoteliers. She practiced in Florida for five years as an Assistant State Attorney before joining DunnCox, and is a Consultant and member of the Litigation and Alternative Dispute Resolution Department.

Ms. Lightbourne also holds the position of Director for Caledonia Medical Laboratory, and is the Chairman of the Cannabis Licensing Authority.



Mrs. Nicola Madden-Grieg
Hotelier, The Courtleigh Hospitality Group

Nicola Madden-Grieg has over 20 years' experience in the hospitality business. She has held various management positions and is currently Group Director of Marketing and Sales for the Courtleigh Hotel and Suites, the Knutsford Court Hotel, the Courtleigh Corporate Centre, the Jamaica Pegasus Hotel and the Holiday Inn Resort, Montego Bay All-Inclusive.

Mrs. Madden-Grieg holds a Bachelor's Degree in Hospitality and Tourism Management (Honours) from Florida International University, and an Executive Masters in Business Administration (Distinction) from the University of the West Indies (Mona School of Business). She has served as Past President, Jamaica Hotel & Tourist Association (JHTA); Director and 5th Vice President of the Caribbean Hotel & Tourism Association (CHTA), Chairman of the Membership Sub-committee: JHTA; Chairman of the Fundraising and PR Sub-committee, JHTA; Area Chairman of the JHTA Kingston Chapter and Chairman of the Finance and Development Sub-committee of the Tourism Product and Development Company (TPDCo). Mrs. Madden-Grieg is also a member of the Tourism Linkages Council and Chair of the Gastronomy Network.

Mrs. Madden-Grieg is a member of the Joint JHTA/JTB Marketing Sub-committee, and a member of the JTB Events Sub-committee.



Mr. Lionel Reid, CD
Hotelier, Tourism Consultant

Lionel Reid is a distinguished career hotelier, who has served the hotel industry for over fifty years. He has served in several leadership capacities, including Chairman of National Hotels and Properties and President of the Jamaica Hotel and Tourist Association (1993 – 1997). The region has also benefitted from his contributions as Director of the Caribbean Hotel Association.

In 2009, Mr. Reid was invested with the Order of Distinction in the Rank of Commander, for his outstanding service in the development and marketing of the Jamaican Hotel Industry. His stewardship continued at Jamaica Vacations Limited (JAMVAC) with his appointment as Chairman of the Board in 2016.



Mr. Paul Simpson
Investment Banker

Paul Simpson is the Founder, President and CEO of Cornerstone. He is an Investment Banker with over 13 years experience. He has worked in organisations in the Caribbean, the United States and Europe in various senior roles. He holds a double major in Computer Science and Geology and an MBA in General Management from the University of the West Indies.

Mr. Simpson has sat on various government, private and charity boards including The Youth Advisory Committee of UNESCO, YMCA and the Jamaica Tourist Board, where he served as the Chairman of the Finance and Audit Committee. He is the current Deputy Chairman of Barita Investments Limited.



Mr. Fred Smith, JP
Ground Transportation Executive

Fred Junior Smith, a graduate of the Stanford University Graduate School of Business Executive Programme for Growing Companies, holds a Master of Management degree and brings over 40 years diverse experience in the tourism industry, having served on various industry related boards and committees.

Mr. Smith is the Managing Director and CEO of Tropical Tours Ltd., a Destination Management Company, and the holder of the Thrifty Car Rental franchise in Jamaica. He is a member of the St. James Police Civic Committee and the University of the West Indies (UWI) Ambassador Corps, Chairman of the Spot Valley High School Board since the school's inception in 2005 and Chairman of the Montego Bay/Atlanta Sister City Committee.



Mr. Bertram Wright, CD
Ground Transportation Executive

Bertram Wright holds a Bachelors Degree in Hotel Administration and a Master of Science in Business Administration. He has over 50 years experience in tourism, with 25 years in Hotel Management, working for Inter-Continental Hotel in various management capacities in Germany, France and Jamaica; for the Hyatt Hotel Corporation in the United States as Resident Manager; and he manages and owns hotels in Jamaica.

He is currently Executive Vice-President of Jamaica Tours Limited, a post he has held for the past 28 years. Jamaica Tours Limited is Jamaica's largest Destination Management Company which owns and operates the largest fleet of vehicular equipment in Jamaica, ranging from 50 seater luxury motor-coaches to small mini-vans, cars and SUVs; and is the Distributor for Yutong Buses in Jamaica.

Mr. Wright serves on several boards including the Jamaica Tourist Board as Chairman – Human Resources Committee. He is a Board member of the Montego Bay Convention Centre; a Member of the Tourism Linkages Council; Chapter Chairman and 1st Vice-President of the Jamaica Hotel and Tourist Association; Chairman of the Jamaica Attractions Development Company, and Jamaica Vacations (JAMVAC); 1st Vice-President of Jamaica Association of Attractions and Board Chairman of Barrett Town All-Age School.

BOARD OFFICERS



Mr. Howard McIntosh, JP
Resource Person

Howard McIntosh is an investment and strategic advisor and event specialist to a number of private and public sector entities. He is a managing director of the MSE Group, an international investment and consultancy group; a consulting partner at Crowe, a global consulting and accounting firm; and a senior executive with the Confederation of North & Central America and the Caribbean (Concacaf). He has an extensive career in sports administration having worked with Concacaf in various positions and with FIFA. He has also held senior management positions with the Corporate Group, Citigroup (Jamaica), Continental Bank (Chicago) and the First National Bank of Chicago.

Mr. McIntosh holds an MBA from the University of Chicago and a BBA from Howard University. He currently serves as a resource person on the Boards of the Jamaica Tourist Board and Tourism Enhancement Fund. He is a member of the Entertainment Advisory Board, St. George's College Old Boys Association, GC Foster College of Physical Education and Sport, Jamaica Football Federation; Deputy Chairman of Airports Authority of Jamaica and the Sports Development Foundation; a member of the Howard University School of Business Board of Trustees, Jamaica Lottery Company and Jamaica Reggae Industry Association. Mr. McIntosh is also a member of the Academy of International Business and the National Black MBA Association, and is a certified FIFA Match Commissioner and Instructor.



Mrs. Carol Samuel-Johnson
Board Secretary

Carol Samuel-Johnson joined the Jamaica Tourist Board in 1974 as a Secretary/Stenographer in the Sales Department.

In 1978, she was transferred to the Jamaica Tourist Board's office in Frankfurt, Germany, where she was posted until 1982, becoming fluent in German.

Mrs. Samuel-Johnson was promoted to Executive Secretary in 1979, then Senior Executive Secretary in 1982, prior to returning to Jamaica that year, having been appointed Special Assistant to the Director of Tourism. She was subsequently appointed to the post of Secretary to the Board of Directors in 1982.

BOARD OF DIRECTORS

APRIL 1, 2018 – MARCH 31, 2019

Mr. John Lynch, CD	-	Chairman of the Board
Mr. Donovan White	-	Director of Tourism
Mrs. Nicola Madden-Greig	-	Hotelier, The Courtleigh Hospitality Group
Mr. Wayne Cummings	-	Hotelier, Sandals Resorts International
Mr. Godfrey Dyer* OJ, CD, JP	-	Tourism Consultant
Mr. Josef Forstmayr, OD	-	Hotelier, Round Hill Hotel & Villas
Mr. Philipp Hofer	-	Hotelier, Iberostar Hotels & Resorts
Mr. Lionel Reid, CD	-	Hotelier, Tourism Consultant
Mr. Paul Simpson	-	Investment Banker
Mr. Fred Smith, JP	-	Ground Transportation Executive
Mr. Bertram Wright, CD	-	Ground Transportation Executive
Ms. Hyacinth Lightbourne	-	Attorney-at-Law

*Resigned from the Board of Directors, May 2018.

BOARD SUB-COMMITTEES

JOINT JTB/JHTA MARKETING COMMITTEE

Paul Pennicook/Donovan White - Chairman
Nicola Madden-Greig - Deputy Chairman
Josef Forstmayr, OD
Wayne Cummings
Lionel Reid, CD
Bertram Wright, CD

FINANCE AND AUDIT COMMITTEE

Paul Simpson - Chairman
Lionel Reid, CD
Wayne Cummings
Donovan White

HUMAN RESOURCES COMMITTEE

Bertram Wright, CD - Chairman
Fred Smith, JP
Philipp Hofer
Donovan White
Delano Seivwright

LICENSING/PRODUCT COMMITTEE

Wayne Cummings - Chairman
Josef Forstmayr, OD
Fred Smith, JP
Bertram Wright, CD

EVENTS COMMITTEE

Hyacinth Lightbourne - Chairman
Nicola Madden-Greig
Howard McIntosh
Donovan White
Enola Williams (Co-opted Member)

MANAGEMENT TEAM

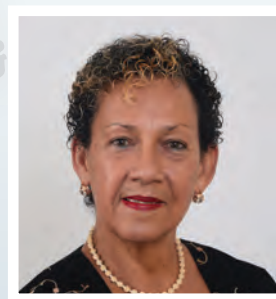
LOCAL

KINGSTON OFFICE

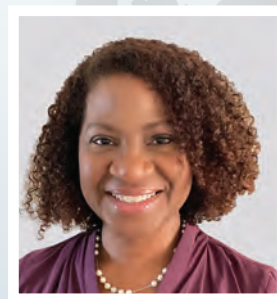
DIRECTOR'S OFFICE



Mr. Donovan White
Director of Tourism

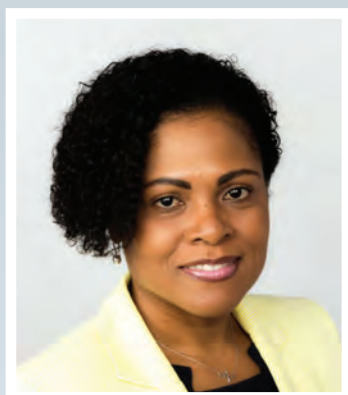


Mrs. Carol Samuel-Johnson
Board Secretary

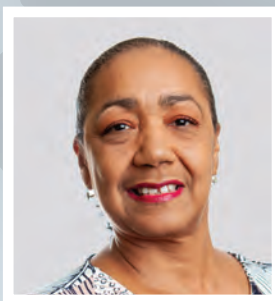


Mrs. Helen Minott
Special Assistant to the
Director of Tourism

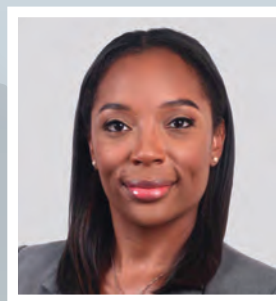
MARKETING



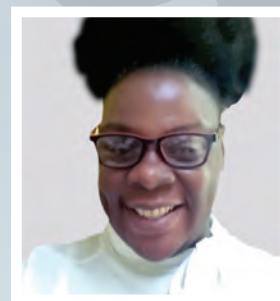
Mrs. Camile Glenister
Deputy Director of Tourism,
Head of Marketing



Mrs. Antoinette Lyn
Research & Market
Intelligence Manager



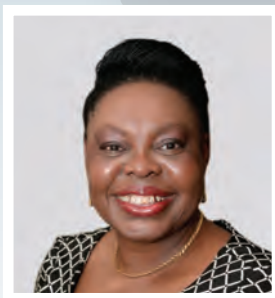
Mrs. Safi James Barrow
Destination Marketing
Manager



Ms. Beth-Ann Barrett
Internal Audit Manager



Ms. Lorna Robinson
Promotions & Events
Manager



Ms. Essie Gardner
Marketing Communications
Manager



Mr. Kristopher DaCosta*
Digital Marketing Manager
*Based in the Miami office

AUDIT

FINANCE

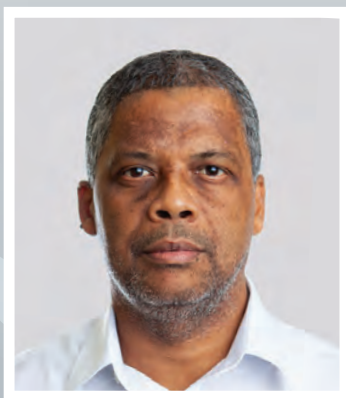


Mr. Errol Jones
Chief Financial Officer



Ms. Cheryl McKenzie
Manager, Finance
& Accounting

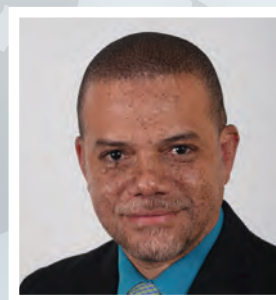
CORPORATE SERVICES



Mr. Peter Mullings
Head, Technology
& Administration



**Mrs. Marshalee
Johnson Spencer**
Senior Manager, Human
Resources Development

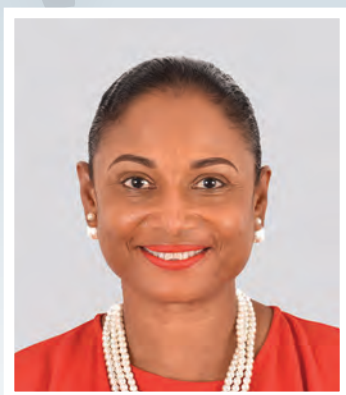


Mr. Amal George Duval
Senior Manager,
Information Systems



Mr. Ray Wong
Personnel Manager

MONTEGO BAY OFFICE



Mrs. Odette Soberam Dyer
Regional Director, Jamaica



Ms. Andrea Savizon
Visitor Relations
Manager

JAMAICA[®]
ONE LOVE

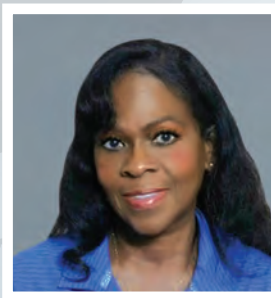
MANAGEMENT TEAM

GLOBAL

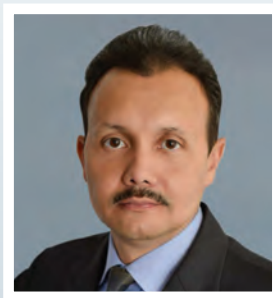
THE AMERICAS



Mr. Donald Dawson
Deputy Director of Tourism
Sales/USA



Ms. Karlene Shakes
National Sales Manager



Mr. John Woolcock
Manager, Groups
& Conventions



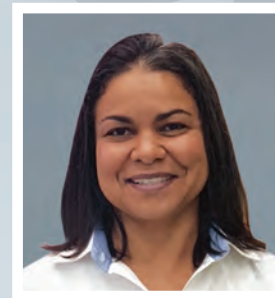
Mr. Christopher Dobson
District Sales Manager
(Midwest USA)



Ms. Trudy Dixon
Caribbean Sales Manager



Ms. Marcia Sinclair
District Sales Manager
(Northeast USA)



Mrs. Francine Carter-Henry
Caribbean Sales Manager/
Manager, Tour Operators
and Airlines

UNITED KINGDOM



Mrs. Elizabeth Fox
Regional Director

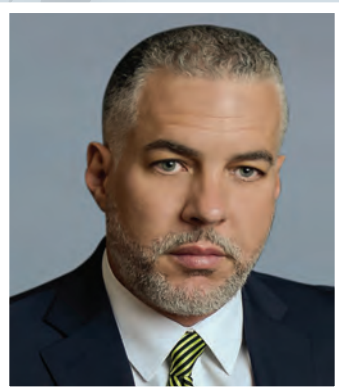


Mr. Torrance Lewis
District Sales Manager
(London)



Mr. Gregory Shervington
Regional Director

CANADA



Mr. Philip Rose
Regional Director



Mr. Daniel Hamilton
District Sales Manager

TOURISM PERFORMANCE SUMMARY 2018



“ The United States, United Kingdom, and Canada have continued to provide the destination with year-on-year growth, consistently, over time. ”

- Donovan White, Director of Tourism

PERFORMANCE



STOPOVER ARRIVALS	2017	2018	% CHANGE 2018-2017
CRUISE PASSENGER ARRIVALS	2,353,915	2,472,727	5.1%
	1,923,274	1,845,873	-4.0%
TOTAL VISITORS	4,276,189	4,318,600	1.0%
STOPOVER ARRIVAL EARNINGS US\$M	2,830	3,121	10.3%
CRUISE PASSENGER EARNINGS	180	184	2.2%
GROSS FOREIGN EXCHANGE EARNINGS	3,010	3,3	9.8%



REGION

	MARKET SHARE	TOTAL ARRIVALS 2018 JAN-DEC	% CHANGE 2018-2017
USA			
CANADA	64.2%	1,628,402	7.8%
	17.2%	399,969	-1.3%
UK & NORTHERN EU	9.3%	225,291	-2.7%
CONTINENTAL EU	4.6%	103,078	9.2%
	2.7%	67,495	5.6%
CARIBBEAN	2.0%	48,492	1.0%
ALL OTHERS			

JAMAICA[®]

ONE LOVE



Trident Castle, Port Antonio
Photo Credit: Jamaica Tourist Board



JAMAICA[®]
ONE LOVE

**AUDITED
FINANCIAL
STATEMENTS**
2018 - 2019

YS Falls, St. Elizabeth
Photo Credit: Jamaica Tourist Board



KPMG
Chartered Accountants
P.O. Box 436
6 Duke Street
Kingston
Jamaica, W.I.
+1 (876) 922-6640
firmmail@kpmg.com.jm

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 32, which comprise the statement of financial position as at March 31, 2019, 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, 2019, 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 International Code of Ethics for Professional Accountants including International Independence Standards (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.

KPMG, a Jamaican partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee.

R. Tarun Handa
Cynthia L. Lawrence
Rajan Trehan
Norman O. Rainford

Nigel R. Chambers
Nyssa A. Johnson
W. Gihan C. De Mel

Wilbert A. Spence
Rochelle N. Stephenson
Sandra A. Edwards

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.

JAMAICA TOURIST BOARD

Independent Auditor's Report (Cont'd.)

March 31, 2019

To the Board of Management
JAMAICA TOURIST BOARD

Auditors' Responsibilities for the Audit of the Financial Statements (Continued)

- 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.



Chartered Accountants
Kingston, Jamaica

April 26, 2021

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

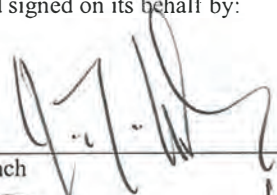
JAMAICA TOURIST BOARD


Statement of Financial Position

Year ended March 31, 2019

	Notes	2019 \$'000	2018 \$'000
CURRENT ASSETS			
Cash and cash equivalents	5	824,452	900,826
Accounts receivable	6	<u>81,933</u>	<u>33,757</u>
		<u>906,385</u>	<u>934,583</u>
CURRENT LIABILITY			
Accounts payable	7	<u>479,622</u>	<u>341,064</u>
NET CURRENT ASSETS		426,763	593,519
NON-CURRENT ASSET			
Property, plant and equipment	8	<u>27,403</u>	<u>11,185</u>
		<u>454,166</u>	<u>604,704</u>
Financed by:			
RESERVES			
Surplus from Tourism Trade Development Board		19	19
Capital expenditure fund	9	27,403	11,185
Motor vehicle revolving fund	10	22,165	6,413
Accumulated surplus		<u>404,579</u>	<u>587,087</u>
		<u>454,166</u>	<u>604,704</u>

The financial statements on pages 4 to 32 were approved by the Board of Management on April 26, 2021 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 BOARD

Statement of Profit and Loss and Other Comprehensive Income

Year ended March 31, 2019

	<u>Notes</u>	<u>2019</u> \$'000	<u>2018</u> \$'000
Government Grants:			
Ministry of Tourism - Subvention		1,519,874	1,376,339
Caribbean Tourism Organisation (CTO)		28,140	25,631
Overseas Marketing - Ministry of Tourism	11	3,052,871	2,921,106
Tourism Enhancement Fund - Other		<u>-</u>	<u>66,281</u>
		<u>4,600,885</u>	<u>4,389,357</u>
Less: Grants used for capital expenditure		27,679	4,423
Grants used for motor vehicle revolving fund	10	<u>21,390</u>	<u>6,495</u>
		<u>49,069</u>	<u>10,918</u>
Amount available for operational expenditure		<u>4,551,816</u>	<u>4,378,439</u>
Operational expenditure:			
Overseas offices expenditure:			
United States of America (USA)		(774,073)	(626,525)
Canada		(199,100)	(148,602)
Germany		(101,664)	(106,374)
United Kingdom (UK)/Europe		(160,201)	(136,436)
Overseas advertising		(1,909,373)	(1,552,177)
Overseas public relations		(291,576)	(261,735)
Overseas special projects		(343,248)	(320,292)
Familiarisation tours		(7,258)	(6,103)
Marketing representatives		(84,841)	(76,201)
Membership - International Organisation		<u>(29,082)</u>	<u>(29,769)</u>
Balance carried forward		<u>(3,900,416)</u>	<u>(3,264,214)</u>

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

	<u>2019</u> \$'000	<u>2018</u> \$'000
Operational expenditure (continued):		
Balance brought forward	(3,900,416)	(3,264,214)
Local offices expenditure:		
Executive office:		
- Director emoluments	(24,794)	(18,423)
- Director of Tourism Department	(58,475)	(33,925)
Destination marketing	(198,651)	(158,758)
Corporate services	(350,973)	(296,945)
Finance and administration:		
- Director fees	(1,115)	(862)
- Auditors' remuneration	(1,912)	(1,933)
- Other	(101,250)	(70,207)
Internal audit	(6,435)	(10,451)
Cruise, marine & attractions	(-)	(16,553)
General manager - Regional offices	(96,047)	(88,020)
	(839,652)	(696,077)
Total expenditure	(4,740,068)	(3,960,291)
Other income:		
Gain on disposal of property, plant and equipment	-	1,450
Motor vehicle loan payments	5,638	82
Miscellaneous income	33,836	15,967
	39,474	17,499
Net finance cost:		
Interest income	2,052	733
Interest expense	-	(11)
Foreign exchange losses	(35,782)	(27,099)
	(33,730)	(26,377)
(Deficit)/surplus for the year, being total comprehensive (deficit)/ surplus	(182,508)	409,270

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

JAMAICA TOURIST BOARD

Statement of Changes in Reserves

Year ended March 31, 2019

	Surplus from Tourism Trade Development Board	Capital expenditure fund	Motor car revolving fund	Accumulated surplus	Total
	\$'000	\$'000 (note 9)	\$'000 (note 10)	\$'000	\$'000
Balances at March 31, 2017	19	14,475	-	177,817	192,311
Net capital expenditure	-	(3,290)	6,413	-	3,123
Total surplus recognised in 2018	<u>-</u>	<u>-</u>	<u>-</u>	<u>409,270</u>	<u>409,270</u>
Balances at March 31, 2018	19	11,185	6,413	587,087	604,704
Net capital expenditure	-	16,218	15,752	-	31,970
Total deficits recognised in 2019	<u>-</u>	<u>-</u>	<u>-</u>	<u>(182,508)</u>	<u>(182,508)</u>
Balances at March 31, 2019	<u>19</u>	<u>27,403</u>	<u>22,165</u>	<u>404,579</u>	<u>454,166</u>

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

JAMAICA TOURIST BOARD

Statement of Cash Flows

March 31, 2019

	<u>Notes</u>	<u>2019</u> \$'000	<u>2018</u> \$'000
CASH FLOW FROM OPERATING ACTIVITIES			
(Deficit)/surplus for the year		(182,508)	409,270
Adjustments to reconcile surplus for year to net cash provided by operating activities:			
Interest income		(2,052)	(733)
Interest expense		-	11
Depreciation	8	10,741	7,713
Gain on disposal of property, plant and equipment		-	(1,450)
Foreign exchange losses		<u>35,782</u>	<u>27,099</u>
		(138,037)	441,910
Changes in:			
Accounts receivable		(48,176)	12,324
Accounts payable		<u>138,558</u>	<u>33,346</u>
Cash (used)/provided by operating activities		(47,655)	487,580
Interest paid		<u>-</u>	(11)
Net cash (used)/provided by operating activities		(<u>47,655</u>)	<u>487,569</u>
CASH FLOWS FROM INVESTING ACTIVITIES			
Acquisition of property, plant and equipment	8	(27,679)	(4,423)
Proceeds from sale of property, plant and equipment		720	1,450
Interest received		<u>2,052</u>	<u>733</u>
Net cash used by investing activities		(<u>24,907</u>)	(<u>2,240</u>)
CASH FLOWS FROM FINANCING ACTIVITIES			
Capital expenditure fund, net		16,218	(3,290)
Motor vehicle revolving fund, net		<u>15,752</u>	<u>6,413</u>
Net cash provided by financing activities		<u>31,970</u>	<u>3,123</u>
Net (decrease)/increase in cash and cash equivalents		(40,592)	488,452
Effect on foreign exchange rate changes		(35,782)	(27,099)
Cash and cash equivalents at beginning of the year		<u>900,826</u>	<u>439,473</u>
Cash and cash equivalents at end of the year	5	<u>824,452</u>	<u>900,826</u>

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements

March 31, 2019

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 152 persons at March 31, 2019 (2018: 143).

2. Basis of preparation

(a) Statement of compliance:

The financial statements as at and for the year ended March 31, 2019 (reporting date) are prepared in accordance with International Financial Reporting Standards (IFRS) and their interpretations, as issued 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 financial year. This is the first set of the Board’s annual financial statement in which IFRS 9, *Financial Instruments*, have been applied from April 1, 2018. Changes to significant accounting policies are described in note 3.

New and amended standards issued but not yet effective:

At the date of authorization of the financial statements, certain new and amended standards and interpretations were in issue but were not yet effective for the current financial year and which the Board has not early-adopted. The Board has assessed the relevance of all such new standards and interpretations with respect to its operations and has determined that the following may be relevant:

- The Board will adopt IFRS 16, *Leases* effective April 1, 2019. IFRS 16 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. Lessees 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.

2. Basis of preparation (continued)

(a) Statement of compliance (continued):

New and amended standards issued but not yet effective (continued):

- Amendments to IFRS 9 *Financial Instruments*, effective retrospectively for annual periods beginning on or after January 1, 2019 clarifies the treatment of:
 - (i) Prepayment features with negative compensation:

Financial assets containing prepayment features with negative compensation can be measured at amortised cost or at fair value through other comprehensive income (FVOCI) if they meet the other relevant requirements of IFRS 9.
 - (ii) Modifications to financial liabilities:

If the initial application of IFRS 9 results in a change in accounting policy arising from modified or exchanged fixed rate financial liabilities, retrospective application is required, subject to particular transitional reliefs. There is no change to the accounting for costs and fees when a liability has been modified, but not substantially. These are recognised as an adjustment to the carrying amount of the liability and are amortised over the remaining term of the modified liability.
- Amendments to *References to Conceptual Framework in IFRS Standards* is effective retrospectively for annual reporting periods beginning on or after January 1, 2020. The revised framework covers all aspects of standard setting including the objective of financial reporting.

The main change relates to how and when assets and liabilities are recognised and de-recognised in the financial statements.

- New ‘bundle of rights’ approach to assets will mean that an entity may recognise a right to use an asset rather than the asset itself;
- A liability will be recognised if an entity has no practical ability to avoid it. This may bring liabilities on balance sheet earlier than at present.
- A new control-based approach to de-recognition will allow an entity to derecognize an asset when it loses control over all or part of it; the focus will no longer be on the transfer of risks and rewards.

March 31, 2019

2. Basis of preparation (continued)

(a) Statement of compliance (continued):

New and amended standards issued but not yet effective (continued):

- Amendment to IAS 1 *Presentation of Financial Statements* and IAS 8 *Accounting Policies, Changes in Accounting Estimates and Errors* is effective for annual periods beginning on or after January 1, 2020, and provides a definition of 'material' to guide preparers of financial statements in making judgements about information to be included in financial statements.

"Information is material if omitting, misstating or obscuring it could reasonably be expected to influence decisions that the primary users of general purpose financial statements make on the basis of those financial statements, which provide financial information about a specific reporting entity."

- Amendments to IFRS 16 *Leases* is effective for annual periods beginning on or after June 1, 2020, with early application permitted. It provides guidance for COVID-19 related rent concessions.

The amendments introduce an optional practical expedient that simplifies how a lessee accounts for rent concessions that are a direct consequence of COVID-19. A lessee that applies the practical expedient is not required to assess whether eligible rent concessions are lease modifications, and accounts for them in accordance with other applicable guidance. The resulting accounting will depend on the details of the rent concession. For example, if the concession is in the form of a one-off reduction in rent, it will be accounted for as a variable lease payment and be recognised in profit or loss.

The practical expedient will only apply if:

- the revised consideration is substantially the same or less than the original consideration;
- the reduction in lease payments relates to payments due on or before 30 June 2021; and
- no other substantive changes have been made to the terms of the lease.

Lessees applying the practical expedient are required to disclose:

- that fact, if they have applied the practical expedient to all eligible rent concessions and, if not, the nature of the contracts to which they have applied the practical expedient; and
- the amount recognised in profit or loss for the reporting period arising from application of the practical expedient.

No practical expedient is provided for lessors. Lessors are required to continue to assess if the rent concessions are lease modifications and account for them accordingly.

2. Basis of preparation (continued)

(a) Statement of compliance (continued):

New and amended standards issued but not yet effective (continued):

- Annual Improvements to IFRS Standards 2018-2020 cycle contain amendments to IFRS 1 First-time Adoption of International Financial Reporting Standards, IFRS 9 *Financial Instruments*, IFRS 16 *Leases*, IAS 41 *Agriculture*, and are effective for annual periods beginning on or after January 1, 2022.
 - (i) IFRS 9 *Financial Instruments amendment* clarifies that – for the purpose of performing the ‘10 per cent test’ for derecognition of financial liabilities – in determining those fees paid net of fees received, a borrower includes only fees paid or received between the borrower and the lender, including fees paid or received by either the borrower or lender on the other’s behalf.
 - (ii) IFRS 16 *Leases amendment* removes the illustration of payments from the lessor relating to leasehold improvements.
 - (iii) The amendments to IAS 41 *Agriculture* removes the requirement to exclude cash flows for taxation when measuring fair value, thereby aligning the fair value measurement requirements in IAS 41 with those in IFRS 13 *Fair Value Measurement*.

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, as at and for the year ended March 31, 2019 (reporting date) 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.

Estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimates are revised and in any future periods affected. Judgements made by management in the application of IFRS that have a significant effect on the financial statements and estimates with a significant risk of material adjustment in the next financial year are discussed below:

March 31, 2019

2. Basis of preparation (continued)

(c) Estimates and judgements (continued):

(i) Financial assets:

Judgements

For the purpose of these financial statements, judgement refers to the informed identification and analysis of reasonable alternatives, considering all relevant facts and circumstances, and the well-reasoned, objective and unbiased choice of the alternative that is most consistent with the agreed principles set out in IFRS. The key relevant judgements are as follows:

- *Applicable to 2019 only:*

(1) Impairment of financial assets:

Establishing the criteria for determining whether credit risk on a financial asset has increased significantly since initial recognition, determining methodology for incorporating forward-looking information into measurement of expected credit loss (ECL) and selection and approval of models used to measure ECL require significant judgement.

Key assumptions concerning the future and other sources of estimation uncertainty:

- *Applicable to 2019 only*

Allowance for impairment losses:

In determining amounts recorded for impairment losses of financial assets in the financial statements, management makes assumptions in determining the inputs to be used in the ECL measurement model, including incorporation of the forward-looking information. Management also estimates the likely amount of cash flows recoverable on the financial assets in determining loss given default. The use of assumptions make uncertainty inherent in such estimates.

3. Changes in significant accounting policies

The Board has initially adopted IFRS 9 *Financial Instruments* from April 1, 2018. There are other new standards that were also effective from April 1, 2018 but they do not have a material effect on the Board's financial statements.

Due to the transition method chosen by the Board in applying IFRS 9, comparative information throughout these financial statements has not been restated to reflect the requirements of these new standards.

3. Changes in significant accounting policies (continued)

The effect of initially applying these standards is mainly attributed to the following:

- an increase in impairment losses recognised on financial assets;
- additional disclosures related to IFRS 9 [see notes 4(g) and 16(i)];

Except for the changes below, the Board has consistently applied the accounting policies as set out in note 4 to all periods presented in these financial statements.

(a) IFRS 9, *Financial Instruments*

IFRS 9 sets out requirements for recognising and measuring financial assets, financial liabilities and some contracts to buy or sell non-financial items. This standard replaces IAS 39 *Financial Instruments: Recognition and Measurement*. The requirements of IFRS 9 represent a significant change from IAS 39. The new standard brings fundamental changes to the accounting for financial assets and to certain aspects of the accounting for financial liabilities.

As a result of the adoption of IFRS 9, the Board has adopted consequential amendments to IAS 1 *Presentation of Financial Statements*, which require separate presentation in the statement of profit or loss and other comprehensive income of impairment of financial assets. Additionally, the Board has adopted consequential amendments to IFRS 7 *Financial Instruments: Disclosures* that are applied to disclosures about 2019, but have not been applied to the comparative information.

IFRS 9 contains three principal classification categories for financial assets: measured at amortised cost, fair value through other comprehensive income (FVOCI) and fair value through profit or loss (FVTPL). IFRS 9 classification is generally based on the business model in which a financial asset is managed and its contractual cash flows. The standard eliminates the previous IAS 39 categories of held-to-maturity, loans and receivables and available-for-sale (AFS).

IFRS 9 largely retains the existing requirements in IAS 39 for the classification and measurement of financial liabilities.

The following table and the accompanying notes explain the original measurement categories under IAS 39 and the new measurement categories under IFRS 9 for each class of the Board's financial assets as at April 1, 2018.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Cont'd.)

March 31, 2019

3. Changes in significant accounting policies (continued)

(a) IFRS 9, *Financial Instruments (continued)*

The effect of adopting IFRS 9 on the carrying amounts of financial assets at April 1, 2018 relates mainly to the new disclosures and impairment requirements.

	Note	Original classification under IAS 39	New classification under IFRS 9	IAS 39 carrying amount at March 31, 2018	Remeasurement	IFRS 9 carrying amount at April 1, 2018
Financial assets				\$'000	\$'000	\$'000
Cash and cash equivalents		Loans and receivables	Amortised cost	900,826	-	900,826
Accounts receivable	(i)	Loans and receivables	Amortised cost	<u>33,757</u>	<u>-</u>	<u>33,757</u>
				<u>934,583</u>	<u>-</u>	<u>934,583</u>

- (i) Accounts receivable being amounts primarily due from related parties were classified as loans and receivables under IAS 39 are now classified at amortised cost. No allowance for impairment over these receivables was recognised in opening retained earnings at April 1, 2018 on transition to IFRS 9, as the amounts were not considered to be materially impaired.

Impairment of financial assets

IFRS 9 replaces the “incurred loss” model in IAS 39 with an “expected credit loss” (ECL) model. The new impairment model applies to financial assets measured at amortised cost. Under IFRS 9, credit losses are recognised earlier than under IAS 39.

For assets in the scope of the IFRS 9 impairment model, impairment losses are generally expected to increase and become more volatile. The Board has determined that application to IFRS 9’s impairment requirements at April 1, 2018 results in an additional allowance for impairment however the amount was not material and therefore not recognised on transition.

Additional information about how the Board measures allowance for impairment is described in note 4(g).

Transition

The Board has used an exemption not to restate comparative information for prior periods with respect to classification and measurement (including impairment) requirements. Differences in the carrying amounts of financial assets and financial liabilities resulting from the adoption of IFRS 9 were not considered material for recognition in retained

4. Significant accounting policies

(a) Cash and cash equivalents:

Cash and cash equivalents comprise cash and bank balances and are measured at amortised cost.

(b) Accounts receivable:

Accounts receivable are measured at cost less impairment losses [see note 4(g)].

(c) Accounts payable:

Accounts payable, including provisions, are measured at cost.

(d) 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 4(g)].

(e) 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%

(f) 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.

(g) Impairment:

Financial assets

Policy applicable from April 1, 2018

The Board recognises loss allowances for expected credit losses (ECLs) on financial assets measured at amortised cost.

March 31, 2019

4. Significant accounting policies (continued)

(g) Impairment (continued):

Financial assets (continued)

Policy applicable from April 1, 2018 (continued)

The Board measures loss allowances at an amount equal to lifetime ECLs. Loss allowances for receivables are always measured at an amount equal to lifetime ECLs.

When determining whether the credit risk of a financial asset has increased significantly since initial recognition and when estimating ECLs, the Board considers reasonable and supportable information relevant and available without undue cost or effort. This includes both quantitative and qualitative information and analysis, based on the Board's historical experience and informed credit assessment and including forward looking information.

The Board assumes that the credit risk on financial assets has increased significantly if it is more than 360 days past due.

The Board recognises loss allowances for ECLs considers a financial asset to be in default when:

- the debtor is unlikely to pay its credit obligations to the Board in full, without recourse by the Board to action such as realising security if any is held; or
- the financial asset is more than 360 days past due.

Life-time ECLs are the ECLs that result from all possible default events over the expected life of the financial instrument.

The maximum period considered when estimating ECLs is the maximum contractual period over which the Board is exposed to credit risk.

Measurement of ECLs

ECLs are a probability-weighted estimate of credit losses. Credit losses are measured as the present value of all cash shortfalls (i.e. the difference between the cash flows due to the entity in accordance with the contract and the cash flows that the Board expects to receive).

ECLs are discounted at the effective interest rate of the financial asset.

Credit-impaired financial assets

At each reporting date, the Board assesses whether financial assets carried at amortised costs are credit-impaired. A financial asset is 'credit-impaired' when one or more events that have a detrimental impact on the estimated future cash flows of the financial asset have occurred.

4. Significant accounting policies (continued)

(g) Impairment (continued):

Financial assets (continued)

Policy applicable from April 1, 2018 (continued)

Credit-impaired financial assets (continued)

Evidence that a financial asset is credit-impaired includes the following observable data:

- significant financial difficulty of the borrower or issuer;
- a breach of contract such as a default or past due event;
- it is becoming probable that the borrower will enter bankruptcy or other financial reorganisation; or
- the disappearance of an active market for a security because of financial difficulties.

Presentation of allowance for ECL in the statement of financial position

Loss allowances for financial assets measured at amortised cost are deducted from the gross carrying amount of the assets.

Write-off

The gross carrying amount of a financial asset is written off (either partially or in full) when there is no reasonable expectation of recovering a financial asset in its entirety or a portion thereof. This is the case when the Board determines that the debtor does not have assets or sources of income that could generate sufficient cash flows to repay the amounts subject to the write-off. This assessment is carried out at the individual asset level. Recoveries of amounts previously written off are included in 'impairment losses on financial instruments' in the statement of profit or loss. Financial assets that are written off could still be subject to enforcement activities in order to comply with the Board's procedures for recovery of amounts due.

Policy applicable before April 1, 2018

An allowance for impairment is established if there is objective evidence that the Board will not be able to collect all amounts due according to the original contractual terms. The amount of the allowance is the difference between the carrying amount and the 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.

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.

March 31, 2019

4. Significant accounting policies (continued)

(g) Impairment (continued):

Non-financial assets

The carrying amounts of the Board's non-financial 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.

The recoverable amount of non-financial 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.

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.

(h) Grant income:

Government grants are recognised when received or deemed receivable.

(i) Interest income:

Interest income is recognised in the profit or loss using effective interest method. The "effective interest rate" is the rate that exactly discounts the estimated future cash receipts through the expected life of the financial instruments to its gross carrying amount.

(j) 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").

(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.

4. Significant accounting policies (continued)

(j) Related parties (continued):

(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.

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

(k) 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.

March 31, 2019

4. Significant accounting policies (continued)

(1) 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 receivable and financial liability comprise accounts payable.

(i) Recognition and initial measurement

Trade receivables are initially recognised when they are originated. All other financial assets and financial liabilities are initially recognised when the Board becomes a party to the contractual provisions of the instrument.

A financial asset (unless it is a receivable without a significant financing component) or financial liability is initially measured at fair value plus, for an item not at FVTPL, transaction costs that are directly attributable to its acquisition or issue. A receivable without a significant financing component is initially measured at transaction price.

(ii) Classification and subsequent measurement

Financial assets – Policy applicable from April 1, 2018

The financial assets that meet both of the following conditions and are not designated as at fair value through profit or loss: a) are held within a business model whose objective is to hold assets to collect contractual cash flows, and b) its contractual terms give rise on specified dates to cash flows that are solely payments of principal and interest on the principal amount outstanding, are classified as “held to collect” and measured at amortised cost.

Amortised cost represents the net present value (“NPV”) of the consideration receivable or payable as of the transaction date. This classification of financial assets comprises the following captions:

- Cash and cash equivalents
- Accounts receivable

Due to their short-term nature, the Board initially recognizes these assets at the original invoices or transaction amount less expected credit losses.

Subsequent measurement

The subsequent measurement of financial assets depends on their classification as described in the particular recognition methods disclosed in their individual policy statements associated with each item.

4. Significant accounting policies (continued)

(l) Financial instruments (continued):

(ii) Classification and subsequent measurement (continued)

Financial assets – Policy applicable from April 1, 2018 (continued)

Derecognition

A financial asset is primarily derecognised when the rights to receive cash flows from the asset have expired, or the Board has transferred its rights to receive cash flows from the asset or has assumed an obligation to pay the received cash flows in full without material delay to a third party under a ‘pass-through’ arrangement; and either (a) the Board has transferred substantially all the risks and rewards of the asset, or (b) the Board has neither transferred nor retained substantially all the risks and rewards of the asset, but has transferred control of the asset.

Financial liabilities

Initial recognition and measurement

All financial liabilities are recognised initially at fair value and in the case of loans and borrowings, plus directly attributable transaction costs. The Board’s financial liabilities, which include accounts payable are recognised initially at fair value.

Subsequent measurement

The subsequent measurement of financial liabilities depends on their classification as described in the particular recognition methods disclosed in the individual policy statements associated with each item.

Derecognition

A financial liability is derecognised when the obligation under the liability is discharged or cancelled or expires.

When an existing financial liability is replaced by another from the same lender on substantially different terms, or the terms of an existing liability are substantially modified, such an exchange or modification is treated as a derecognition of the original liability and the recognition of a new liability, and the difference in the respective carrying amounts is recognised in the statement of profit or loss.

Offsetting of financial instruments

Financial assets and financial liabilities are offset and the net amount is reported in the statement of financial position if there is a currently enforceable legal right to offset the recognised amounts and there is intention to settle on a net basis, to realise the assets and settle the liabilities simultaneously.

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Cont'd.)

March 31, 2019

4. Significant accounting policies (continued)

(m) Determination of fair value:

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. Market price is used to determine fair value where an active market exists as it is the best evidence of the fair value of a financial instrument.

5. Cash and cash equivalents

	<u>2019</u> \$'000	<u>2018</u> \$'000
Cash at bank	817,702	894,389
Imprest accounts	<u>6,750</u>	<u>6,437</u>
	<u>824,452</u>	<u>900,826</u>

6. Accounts receivable

	<u>2019</u> \$'000	<u>2018</u> \$'000
Trade receivables:		
Accountant General Department	-	5
Ministry of Tourism	11,776	6,667
Tourism Enhancement Fund	1,328	994
Tourism Product Development Company Limited	537	537
Jamaica Vacations Limited	451	167
Norman Manley International Airport	900	-
Paradise Travel in Jamaica	-	1
Other	<u>56</u>	<u>-</u>
	15,048	8,371
Less: Allowance for impairment (i)	(<u>196</u>)	(<u>196</u>)
	<u>14,852</u>	<u>8,175</u>
Other receivables:		
Prepayments and deferred expenses	36,723	14,122
Staff computer loans	271	254
Staff motor vehicle loans	22,164	6,413
Others	<u>7,923</u>	<u>4,793</u>
	<u>67,081</u>	<u>25,582</u>
	<u>81,933</u>	<u>33,757</u>

6. Accounts receivable (continued)

(i) The aging of trade receivables at the reporting date was:

	2019		2018	
	<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	2,133	-	5	-
Past due 31-60 days	499	-	604	-
Past due 61-90 days	590	-	37	-
Past due 91-360 days	11,630	-	7,529	-
Past due over 360 days	<u>196</u>	<u>196</u>	<u>196</u>	<u>196</u>
	<u>15,048</u>	<u>196</u>	<u>8,371</u>	<u>196</u>

No significant impairment loss was recognised in regard to an individual receivable.

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

	<u>2019</u>	<u>2018</u>
	<u>\$'000</u>	<u>\$'000</u>
Balance at beginning/end of the year	<u>196</u>	<u>196</u>

7. Accounts payable

	<u>2019</u>	<u>2018</u>
	<u>\$'000</u>	<u>\$'000</u>
Trade payables	144,603	215,917
Accrued charges	322,833	117,610
Other	<u>12,186</u>	<u>7,537</u>
	<u>479,622</u>	<u>341,064</u>

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Cont'd.)

March 31, 2019

8. Property, plant and equipment

	Freehold land and buildings \$'000	Furniture, fixtures and equipment \$'000	Motor vehicle \$'000	Total \$'000
Cost:				
March 31, 2017	294	132,586	13,319	146,199
Additions	-	4,423	-	4,423
Disposal	-	-	(1,753)	(1,753)
March 31, 2018	294	137,009	11,566	148,869
Additions	-	11,636	16,043	27,679
Disposal	-	-	(7,269)	(7,269)
March 31, 2019	<u>294</u>	<u>148,645</u>	<u>20,340</u>	<u>169,279</u>
Depreciation:				
March 31, 2017	269	124,265	7,190	131,724
Eliminated on disposal	-	-	(1,753)	(1,753)
Charge for the year	-	5,750	1,963	7,713
March 31, 2018	269	130,015	7,400	137,684
Eliminated on disposal	-	-	(6,549)	(6,549)
Charge for the year	-	6,846	3,895	10,741
March 31, 2019	<u>269</u>	<u>136,861</u>	<u>4,746</u>	<u>141,876</u>
Net book values:				
March 31, 2019	<u>25</u>	<u>11,784</u>	<u>15,594</u>	<u>27,403</u>
March 31, 2018	<u>25</u>	<u>6,994</u>	<u>4,166</u>	<u>11,185</u>

Freehold land and buildings include freehold land at a cost of \$25,000 (2018: \$25,000).

9. 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.

10. Motor vehicle revolving fund

During the year the Board of Directors approved \$20 million (2018: \$20 million) from grants received for loans to its travelling officers for the purchase of new or used motor vehicles. Of this amount \$21,390,000 (2018: \$6,495,000) was disbursed during the year. The loans should not exceed \$4,000,000 for new motor vehicle and \$2,500,000 for used motor vehicle. The loan is for a period of 72 months at 3% interest on the reducing balance and is repaid through monthly salary deductions.

11. Overseas Marketing

During the year the Board received funding from the Ministry of Tourism (MOT) in the amount of \$3,052,871,000 to assist in its advertising and special projects expenses (2018: \$2,921,106,000). The funds were applied as follows:

	<u>2019</u> \$'000	<u>2018</u> \$'000
Advertising/marketing activities:		
Winter advertising	3,052,871	2,811,541
Montego Bay Live	-	109,565
	<u>3,052,871</u>	<u>2,921,106</u>

12. Staff cost

	<u>2019</u> \$'000	<u>2018</u> \$'000
Overseas:		
United States of America	340,740	304,524
Canada	83,694	81,482
Germany	34,386	35,656
United Kingdom, Europe and Far East	<u>58,829</u>	<u>59,729</u>
	<u>517,649</u>	<u>481,391</u>
Local:		
Executive office - Director of Tourism	42,630	34,992
Destination marketing	108,951	93,079
Corporate services	217,160	200,058
Finance and Administration	42,557	42,902
Internal audit	6,159	10,222
Cruise, Marine and Attractions	-	9,328
General Manager - Regional offices	54,648	56,569
Sports tourism	<u>-</u>	<u>282</u>
	<u>472,105</u>	<u>447,432</u>
	<u>989,754</u>	<u>928,823</u>

13. Taxation

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

JAMAICA TOURIST BOARD

Notes to the Financial Statements (Cont'd.)

March 31, 2019

14. 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.

15. 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>2019</u> \$'000	<u>2018</u> \$'000
Accounts receivable (trade receivables):		
Accountant General Department	-	5
Ministry of Tourism	11,776	6,667
Tourism Product Development Company Limited	537	537
Jamaican Vacation Limited	451	167
Tourism Enhancement Fund	1,328	994
Norman Manley International Airport	900	-
Paradise travels in Jamaica	-	1
Others	56	-
	<u>15,048</u>	<u>8,371</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>2019</u> \$'000	<u>2018</u> \$'000
Income:		
Ministry of Tourism		
Subvention	1,519,874	1,376,339
Caribbean Tourism Organisation	28,140	25,631
Overseas marketing	3,052,871	2,921,106
Tourism Enhancement Fund		
Other	-	66,281
	<u>4,600,885</u>	<u>4,389,357</u>

16. 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.

Impairment on cash and cash equivalents has been measured at 12- month expected loss basis and reflects the short maturities of the exposures. The Board considered that cash resources have low credit risk.

No impairment allowances was recognised on initial adoption of IFRS 9 and there was no change during the period.

The Board's maximum exposure to credit risk at year end is represented by its respective carrying amount.

Accounts receivable:

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. Management performs ongoing analysis of the ability of its counterparty to meet repayment obligations.

Expected credit loss assessment as at April 1, 2018

As at December 31, 2018, no impairment allowances were recognised as the amounts were considered immaterial.

March 31, 2019

16. Financial instruments (continued)

Financial instrument risk (continued):

(i) Credit risk (continued):

The Board uses an allowance matrix to measure ECLs of receivables. The provision matrix is based on its historical observed default rates over the expected life of the receivables and is adjusted for forward looking estimates.

Loss rates are calculated based on the probability of a receivable progressing through successive stages of delinquency to write-off, current conditions and the economic conditions over the expected lives of the receivables.

Comparative information under IAS 39

No impairment allowance was recognised on initial adoption of IFRS 9, as the amounts were considered immaterial and there was no change during the period. As at March 31, 2018, no impairment loss allowance was recognised.

Other accounts receivable

Credit losses on other receivables materially comprise staff advances which are measured as the present value of all cash shortfalls (i.e. the difference between the cash flows due to the entity in accordance with the contract and the cash flows that the Board expects to receive). No impairment allowances were recognised on initial adoption of IFRS 9 and there has been no change during the period.

(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.

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

16. Financial instruments (continued)

Financial instrument risk (continued):

(ii) Market rate risk (continued):

- 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 2019				Net foreign currency (liabilities)/assets 2018			
	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000	EURO \$'000	US \$'000	GBP \$'000	CDN \$'000
Cash and cash equivalents	163	4,009	90	947	4	6,203	249	456
Accounts receivable	-	245	-	-	-	80	-	-
Accounts payable	(330)	(2,325)	(162)	(226)	(90)	(1,904)	(74)	(165)
	(167)	1,929	(72)	721	(86)	4,379	175	291

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

	USD	EURO	GBP	CDN
March 31, 2018:	124.65	159.18	175.48	96.01
March 31, 2019:	123.57	142.28	165.53	90.07

A 6% (2018: 4%) strengthening of the above currencies against the Jamaica dollar would have increased surplus for the year by \$16,058,000 (2018: increased surplus by \$23,632,000).

March 31, 2019

16. Financial instruments (continued)

Financial instrument risk (continued):

(ii) Market rate risk (continued):

- Foreign currency risk (continued):

A 4% (2018: 2%) weakening of the above currencies against the Jamaica dollar would have decreased surplus for the year by \$10,705,000 (2018: decreased surplus by: \$11,816,000).

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 accounts payable 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.

17. Fair value of financial instruments

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

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

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

18. Subsequent event

The World Health Organization declared the novel Coronavirus (COVID-19) outbreak a pandemic on March 11, 2020 and the Government of Jamaica declared the island a disaster area on March 13, 2020. The pandemic and the measures to control its human impact have resulted in disruptions to economic activity, business operations and asset prices. This could have significant negative financial effects on the Board, depending on factors such as:

- (i) the duration and spread of the outbreak,
- (ii) the restrictions and advisories from Government,
- (iii) the effects on the financial and tourism markets, and
- (iv) the effects on the economy overall, all of which are highly uncertain and cannot be estimated reliably.

At the date of authorisation of the financial statements, the Board has not quantified the impact of the pandemic on its financial statements. The operation of the Board was however significantly affected by the closure of the Jamaican borders and shut down of the entertainment sector during the year. Since the re-opening of the hotels in July 2020, the Board has been ramping up its advertisement campaigns to market Jamaica as a favorable destination for tourists.

JAMAICA TOURIST BOARD ACTIVITIES WORLDWIDE

2018 - 2019



2019 Rebel Salute – St. Ann
Photo Credit: Jamaica Tourist Board

JAMAICA[®]

ONE LOVE



ADVERTISING ACTIVITIES WORLDWIDE

JAMAICA®
ONE LOVE

NORCECA Beach Volleyball Tournament – Ocho Rios, St. Ann
Photo Credit: Jamaica Tourist Board

Having served as the Jamaica Tourist Board's (JTB) worldwide advertising agency of record for several years, FCB Global's (FCB) contract came to an end on March 31, 2018. Following a comprehensive procurement exercise in accordance with government's procurement guidelines, Beautiful Destinations (BD) was appointed as the Global Advertising Agency for the Jamaica Tourist Board with effect from November 2018.

Beautiful Destinations' scope of work for the period ending March 2019 included:

- Research
- Overview of the Jamaica Tourist Board
- Meetings with all relevant stakeholders
- Partnership launch
- Content provision and licensing
- Creative consultation and development
- Strategy planning

Accordingly, they undertook

- Meetings with JTB to discuss creative/marketing strategy – December & January
- In-depth immersion and field research – week of December 10
 - Phase 1 of the in-market research kicked off in January with BD delivering the final Phase 1 report on March 18
- Stakeholder, destination, traveller and local interviews – week of December 10
- Location scouting – 4 trips between December 10, 2018 and March 11, 2019, for Kingston Marathon, Montego Bay, Port Antonio, Ocho Rios
- Permits & licensing – as part of the following projects:
 - One Love Winter Campaign Update in December
 - Rebel Salute in January
 - One Love Television Commercial (TVC) Refresh
 - Jamaica Evergreen Content Shoots
- Competitive review and analysis:
 - BD presented an initial competitive review and analysis, as part of the new brand platform strategy, to the Board the week of December 10.
- Storytelling and brainstorming workshops
- Ideation took place on the following projects:
 - JTB Winter Campaign Update
 - Quarterly Productions: Rebel Salute, One Love Campaign Refresh
 - House Idea
 - Brand Platform Launch
 - Reggae Girlz / World Cup Support
- Production scheduling (pre-production, shoot and post-production as applicable, for upcoming projects previously mentioned, as well as content shoots covering the island)
- Winter Television Commercial Campaign Update:
 - Updated TVC with new music ("One Love") and Voice Over in UK English, US English, Canadian English, Canadian French
 - When JTB/BD aligned on not using "One Love" track from a usage perspective, BD delivered updated versions with newly approved track
 - Handled 2 rounds of negotiations of "One Love" track
 - Upon decision to find a new track, BD sourced a new track and handled negotiations/usage rights for the track
 - In Digital, delivered a total of eight banner assets, four unique creative assets
 - Delivered assets and copy for five unique digital partners.

BD undertook research with the overarching goal to gain a visitor-centric perspective that would inform a strategic positioning, as well as a creative platform, which would reposition brand Jamaica for years to come.

Specifically, they wanted to:

- Identify the best ways to gain a unique, relevant place in consumers' minds that is emotionally compelling
- Understand travellers' behaviour
- Evaluate Jamaica's brand perception among target audiences
- Identify effective communication touch points that would serve as a framework for a new marketing platform

The research methodology included working with research partner, YouGov, to conduct:

- 20 minute online survey
- 45 minute in-depth interviews with an additional sample of 15 participants in core markets
- Survey of 7,200 respondents between the ages of 25-64 with a base HH income median for the company in a total of 12 markets from both core and growth markets (France, Germany, Spain, Italy, Argentina, Brazil, Peru, China, India, Japan, Barbados, Trinidad and Tobago)

The research outcomes identified market sizing, brand health, key drivers, brand personality, travel profile, travel planning and four audience segments emerged that cut across all core markets:

- Urban Inclusives
- Guided Suburbanites
- Older Independents
- Young Trailblazers

Of the four segments, Young Trailblazers - 36-year old travellers who love to immerse themselves in everything the destination has to offer (especially interacting with locals) was seen as a super segment. They are worth more, are less price driven, have a more positive perception of Jamaica, what they want from travel aligns with what Jamaica has to offer, and they have influence over all the other three segments.

Recommendations coming out of the survey were:

1. Implement a phased marketing approach and focus on the markets with the highest interest vs. the highest volume:
 - Year 1, focus on core markets (especially Canada, the USA and the UK)
 - Year 2, focus on Latin America and Europe
 - Year 3 & beyond, focus on Asia
2. **"Favourability", "perception" and "interest in visiting"** should become key metrics against which to measure our efforts, as the research had shown that Jamaica was falling short in these areas.
3. Once the larger narrative for Jamaica had been developed, then determine the brand attributes to be measured over time. Here, the "niche marketing strategy" would provide a good framework.
4. Jamaica has a very strong and distinct personality that sets the country apart from competitors and this should be capitalised on. Use the unique brand personality traits (identified as **"soulful", "upbeat" and "vibrant"**) as a foundation for the brand guidelines - i.e. tone of voice (joyful, energetic, youthful, confident, genuine, inclusive), look and feel, and even experience on the ground.

JAMAICA[®]

ONE LOVE



Negril, Westmoreland
Photo Credit: Jamaica Tourist Board

Recommendations coming out of the survey cont'd.

5. Focus on the similarities rather than the differences between countries in core markets, to speak to the largest pool of people.
6. Be in the minds and on the lips of travellers early in the travel process, by using buzz-worthy activations, social media and other above-the-line tactics.
7. Use the Young Trailblazers as the key marketing and creative target in order to drive revenue, use media dollars more efficiently and expand the influence of the Jamaica brand.

A brand strategy was developed, identifying:

- Brand Positioning Statement: JAMAICA's larger than life people, culture and experiences have a powerful impact on the world and all who visit the island.
- Belief Statement: JAMAICA makes the world move.
- Brand Personality: Soulful, upbeat, vibrant
- Brand Tone: Joyful, energetic, youthful, confident, genuine, inclusive.

Towards the end of the period under review, BD initiated brand platform strategic development towards a flagship global campaign to be launched later in 2019.



JAMAICA[®]
ONE LOVE

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. This was subsequently extended for an additional three years, through to March 2020.

SUMMARY

The following report provides an overview of Finn Partners' public relations activities for the period April 2018 to March 2019 in support of the Jamaica Tourist Board's marketing efforts to keep the destination top of mind in the US, Canada and Latin American markets. The agency utilised 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 drafted and distributed **79** press releases, media alerts and photo caption releases.

- Topics showcased included on island festivals, events, trade shows and conferences, seasonal travel, airlift announcements, product launches, spokespersons, awards and accolades.
- Relevant press releases were translated and distributed to Hispanic and Latin American media.

Press Trips

The agency organised **16 Group Press Trips** and **9 Individual Press Trips** covering niche areas and target markets as well as in support of JTB-sponsored events such as the Hanover Charities/Chukka Polo Tournament, Kingston City Marathon, Jamaica Food & Drink Festival and Reggae Marathon. The Agency facilitated both traditional and social media coverage including focus on niche areas such as adventure, family,

music, wellness, history, arts and culture, new media/influencers, bridal, sports and more. A wide variety of media outlets were secured for these press trips.

Promotions

The agency arranged over **25 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 and Southwest Airlines Vacations. Partnerships were implemented providing call-to-action for numerous hotel partners.

These promotions included the following:

- **10 Radio Promotions including four live radio remotes and promotional campaigns with 49 radio stations** targeting consumers in Baltimore, Boston, Charlotte, Chicago, Cincinnati, Dallas, Dayton, Denver, Detroit, Hartford, Houston, Kansas City, Las Vegas, Long Island, Miami, Milwaukee, Minneapolis, Nashville, New York, Orlando, Philadelphia, Phoenix, Pittsburgh, St. Louis, Sudbury, and Toronto.
- **TV Broadcast:** Real Housewives of Orange County, The Steve Harvey Show, Wheel of Fortune, Let's Make a Deal, The Wendy Williams Show, Success Sisters, Asayga, Andiamo!/UPTOWN, CP24 Breakfast.
- **Other:** Dylan's Candy Bar, Ferrari/Maserati, Horizon Magazine, and Contemporary Weddings Magazine.

Events

Finn Partners supported special events in the US and Canada, as well as on island in Jamaica. These events include but are not limited to the following:

- Carnival Week in Jamaica – April 2018
- Reggae Sumfest – July 2018



Caribbean Week - June 2018
Photo Credit: Jamaica Tourist Board

- Ferrari-Maserati Hamptons Event – July 2018
- ISKA Martial Arts Tournament – September 2018
- Jamaica Night at BMO Field in Toronto – September 2018
- Toast of Brooklyn – November 2018
- Jamaica Digital Journey – November 2018
- New York Times Travel Show – January 2019
- CHTA Marketplace Event – January 2019
- SOBEWFF – February 2019
- Jamaica Rum Festival – March 2019

Major Broadcast Initiatives

- Total Traffic & Weather Network (May 2018 and January 2019)
- Ziggy Marley Tour Sponsorship and SiriusXM Promotion (June - August 2018)
- Andiamo!/UPTOWN (September - December 2018)
- KiSS 105.3 Sudbury “Jammin’ in Jamaica” (November 2018)
- KiSS 92.5FM “Daryn Jones in Jamaica” Radio Promotion (January 1-27, 2019)

PUBLIC RELATIONS cont'd.



JAMAICA
ONE LOVE

Jamaica Carnival – Kingston
Photo Credit: Jamaica Tourist Board

THE AMERICAS

Social Media Programmes

- Organic and Paid Programme Review and Results
- Global Social Coordination (Ongoing)

Beginning in August 2018, the Agency began to coordinate and organise social media efforts among the agency social media teams in the US, UK, and Canada. As part of these efforts, the three teams meet monthly to discuss global themes for social media content that are reflected in each region's organic social media content calendar. The three regions also meet with the JTB every

other week to discuss updates on social media, including upcoming social content themes, live content postings, and any current special projects.

Digital Activations

- #MoBayLive Influencer Instagram Takeovers (June 2018)
- Feel The Vibe II (March - June 2018)
- Join Me In Jamaica Global Digital Campaign (March - September 2018)
- Reggae Sumfest Paid Campaign (July 2018)
- Live Instagram Story Content (Ongoing)

Finn supported a number of events with live content on Instagram Stories. This content helped give audiences a more vivid understanding of Jamaican culture and lifestyle, and delivered the authentic, of-the-moment content that audiences demand in Stories features. Events covered live on Instagram Stories included:

- Caribbean Week 2018 Chef Demo: 6,000 story views
- Caribbean Week 2018 Rum & Rhythm: 3,000 story views
- Citi Taste of Tennis 2018: 4,600 story views
- Toast of Brooklyn 2018: 3,400 story views
- South Beach Wine & Food Festival: 21,000 story views
- Penn Relays: 77,900 story views

Major broadcast initiatives, social media programmes and digital activations had a combined reach of **152,986,905** worth **US\$533,000**.

Special Events

- Carnival in Jamaica Influencer Press Trip (April 5-9, 2018)
- JCTI/TSEA Video (May 2018)
- Citi Taste of Tennis in NYC (August 23, 2018)
- Misty Copeland (August 30 - September 2, 2018)
- Southern Bride (September 2018)
- Minister Bartlett and Director White's Visit to Toronto (September 5-7, 2018)
- Jamaica Night at BMO Field in Toronto (September 15, 2018)
- Rebel Salute NY Launch (November 2, 2018)
- Canadian Kingston City Marathon Media Launch (November 7, 2018)
- Toast of Brooklyn (November 10, 2018)
- Horizon Magazine Partnership (November 15, 2018 - January 10, 2019)
- The Export of Jamaican Flavour Documentary (November 23-30, 2018)
- Jamaica Night at Scotiabank Arena (November 26, 2018)
- *Destiny* Movie Screening at the TIFF Bell Lightbox (December 8, 2018)

- Spirit Airlines DTW - MJB Inaugural (December 20, 2018)
- New York Times Travel Show (January 26-28, 2019)
- Caribbean Travel Marketplace (January 27 - February 1, 2019)
- CP24 Breakfast Promotion (March 7-20, 2019)
- NYC Media Visit for Philip Rose, JTB Regional Director, Northeast USA (March 12, 2019)

The special events listed above had a combined reach of **45,982,212** impressions.

Written Materials

- Drafted and distributed monthly sales updates to US, Canada and Latin America sales teams
- Drafted and distributed quarterly Meet You In Jamaica and Feel The Vibe newsletters
- Drafted and finalized introduction greeting for John Woolcock for Meeting Planner Guide 2019/20 (January 21)
- Drafted and submitted "From Montego Bay With Love" advertorial in Horizon Travel & Lifestyle Magazine (February 12)
- Drafted speeches and quotes for Jamaica Tourist Board principals and reactive statements for crisis matters (April 2018 - March 2019)

Social and Media Monitoring Reports

- Distributed daily media monitoring reports and conducted and distributed special media and social monthly reports for emergency matters

Select Media Placements/Highlights

- 4 Bridal, June 2018 - February 2019
- 5 Culinary, June 2018 - March 8, 2019
- 5 Family Travel, October - December 2018
- 12 General Travel, June 2018 - March 2019
- 6 Music, July 2018 - March 2019
- 7 Sports, July 2018 - March 2019
- 9 Trade, April 2018 - March 2019

THE AMERICAS

Select Media Placements/Highlights cont'd.

- 12 for Canada, one per month, April 2018 - March 2019
- 13 for Latin America, March 2018 - March 2019
- 9 Other, September 2018 - January 2019

Media Impressions

Total media impressions by region are as follows:

- United States: 3,593,137,977
- Canada: 15,153,254
- Latin America: 404,168,385
- Social Media: 51,891,579
- **Total Impressions: 4,064,351,195**

UK/IRELAND

Burson-Marsteller (BM) served 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.

Finn UK took over the UK press office from Burson-Marsteller in August 2018 and is now responsible for all elements of PR/Communications for the Jamaica Tourist Board across the UK and Ireland. Finn UK activity supported all functions of the JTB marketing mix, including:

- Press trips (general and themed across key pillars)
- Social media and online activity – management of Facebook, Twitter and Instagram
- Media relations
- Proactive/reactive press office
- Profile building and brand awareness
- Hotel and airline liaisons and partnerships
- Crisis management

Highlights from August 2018 - April 2019

- Finn UK secured and hosted 13 media on individual and group press trips including five trade titles at Caribbean Marketplace
- Confirmed 35 media meetings and attended Dublin Meet the Media with JTB
- Secured and executed a broadcast segment on ITV; Ainsley's Caribbean Kitchen
- Confirmed four media houses to attend the X Factor Live Shows sponsored by JTB
- Confirmed and hosted two media houses at the David Rodigan Concert
- 21 press releases drafted and distributed and two newsletters
- 70+ proactive pitches

Over 173 pieces of media coverage generated with a circulation of over 1,119,998,065 and an Advertising Value Equivalent (AVE) of £2,997,194 from August 2018 to March 2019.

Key areas of focus

- Go beyond the general perception of Jamaica as sun, sand and sea to create a renewed awareness of its off-the-beaten path attractions, promoting authentic experiences to a broader audience
- Promote Jamaica as a family destination, in particular to teens
- Focus on gastronomy, making the island a gastronomic destination
- Highlight Jamaica's music and cultural scene
- Continuing to promote Jamaica as a safe travel destination



Jamaica Travel Market, London - November 2018
Photo Credit: Jamaica Tourist Board

How was this achieved?

- Provide experiential tourism to the media we host
- Focus on the variety of experiences that set Jamaica apart from other Caribbean islands, building on the key pillars which include:
 - Gastronomy
 - Music
 - Culture
 - Family
 - Sport

Strategy

- Drive demand for Jamaica making it a 'must go' destination
- Engage audiences via culturally relevant content shared through influential media choices, including social/word of mouth, digital and traditional
- Keep a spotlight on the positives and change perceptions

Social Media

Finn UK manages the UK Facebook and Twitter accounts; and feeds into the global Instagram account. Finn UK has seen a steady increase and continues to grow JTB's social media presence in the UK market with scheduled social posting from user generated content. Key themes of focus have been gastronomy, attractions and activities, luxury, romance, health and wellness, and friendly culture. KPIs include engagement and follower growth.

Social media activities include:

- Monthly content calendars
- Community management
- Social media crisis communications
- Reporting
- Campaigns
- Social amplification of PR activities
- Harnessing British cultural moments to give social content more resonance with UK market
- CTO Twitter chats

UK/IRELAND

Social Media cont'd.

Jamaica's Social Media Channels figures:

August 2018

Instagram: 63.2k Facebook: 31.3k Twitter: 2.2k

March 2019

Instagram: 81.7k Facebook: 46.7k Twitter: 2.3k

Growth: 29% increase, 49% increase, 5% increase respectively

Themed Press/Influencer Trips

Themed press trips in 2018 - 2019 included:

Reggae Marathon global group trip (27 November - 2 December 2018)

Finn UK secured one UK journalist to join the global group press trip and run the Reggae Marathon. Daniel Davies from Men's Health attended the trip which incorporated activities in Jamaica as well as the run itself. Daniel's article was published online in March 2019 and highlighted Jamaica's vibrant culture, positioning Jamaica as the perfect place to run a marathon where runners can really 'feel the vibe'.

January Caribbean Travel Marketplace Trip (27 January - 1 February 2019)

Jamaica hosted Caribbean Travel Marketplace in 2019. Finn UK secured five UK journalists to attend the event, escorted by a member of the UK team.

Kingston Marathon (13-18 March 2019)

Finn UK secured two UK journalists to run the New Kingston marathon route and visit the island for a destination feature on Jamaica, using the new marathon as a hook.

Key Influencer/Social and Broadcast activities

Join Me in Jamaica campaign (August - October 2018)

JTB created the *Join Me in Jamaica* campaign, which was aimed at populating the digital space, thereby enabling connectivity to every corner of the world. The content-rich video series featured local influencers from Jamaica sharing unique stories about the love for their homeland, and what makes it a great place to visit. Two phases were planned with six videos in each phase.

The *Join Me in Jamaica* campaign was supported through organic content, social ads and programmatic advertising on all Visit Jamaica social channels (Facebook, Twitter, Instagram, Instagram Stories, and YouTube).

Organic social media copy accompanying the videos for each release helped introduce each influencer video and enticed users to watch. Each week, Finn UK promoted the videos in the UK to increase viewership and awareness in the Jamaican market. Throughout the campaign, traffic ads directed users to a microsite and were optimised to generate conversions or clicks to plan or book trips. Target audiences included empty nesters, millennials and bargain hunters.

Ainsley Harriott's Caribbean Kitchen on ITV (October 2018)

Finn UK secured the opportunity for celebrity TV Chef Ainsley Harriott and his production team to visit Jamaica in October 2018 to film two episodes for his television series on ITV - Ainsley Harriott's Caribbean Kitchen. Ainsley went back to his roots to uncover the best kept secrets and most loved classics of Jamaica's cuisine, beginning his journey in Kingston, before travelling across the island to Ocho Rios. Both episodes were aired in January 2019 on ITV - the UK's largest commercial broadcaster, reaching over 38 million viewers a week.

Boohoo/Komodo campaign and press trip (25 April - 1 May)

To increase awareness of Visit Jamaica in the European market, Finn UK worked with Komodo to lead an integrated influencer activation in partnership with global fashion giant, Boohoo. To showcase the culture, diversity, adventure and beauty of Jamaica and target a wider market of millennials who seek new travel experiences and are keen to discover exciting destinations, Komodo/Finn UK hosted nine influencers over six days to drive social growth, spark engagement and create fresh new content. Boohoo was selected as the brand partner as their colourful, bright summer campaign and marketing strategy aligned perfectly with Visit Jamaica. Komodo/Finn UK planned, executed and delivered the activation in April 2019.

The figures for this campaign were impressive. Most notably, JTBs Instagram account achieved an over 10% increase in followers in less than 7 days. Other outstanding elements were:

- Social Growth
- 7,800 new Instagram followers
- 20 tagged influencer Instagram posts
(6 more than required)
- 205 Instagram stories
- Featured by 7 UK print media outlets
- Daily Star, Capital FM, OK, Daily Mail, The Sun, Heat World, The Mirror
- 62 Instagram stories posted by Boohoo
with an average interaction of 40,823 viewers

Press Trips

Finn UK continues to work closely with the JTB to identify key media titles and invite them to the island focused around a bespoke angle and itinerary. The media targets include top-tier national and consumer media, key online titles, and influencers.

Individual press trips

- Alexia Arthurs, BA Highlife (10-14 August)
How to Love a Jamaican
- Ian Sturgess, Daily Mirror (21-28 October)
Reopening of RIU Tropical Palace
- James Henderson, The Daily Telegraph (9-13 November)
Food focused article on Kingston
- Lucy Thackray, Sunday Times Travel magazine (22-27 November)
First Timer's Jamaica: A Four-Page Guide
- Ella Alexander, Harper's Bazaar online (20 January - 6 February)
Jamaica as a Cultural Destination

Pitches/Press Releases

Finn UK created proactive and reactive storytelling angles to secure positive stories in key national and trade media. Finn UK also distributed quarterly newsletters to trade and consumer titles made up of hotel and tour operator news and upcoming on island events collected from partners.

Crisis Management

Finn UK has provided recommendations and response strategies for crisis matters that arose during the period and is continuing to monitor them for further coverage.

Events

Jamaica Travel Market (JTM) (27-29 September 2018)

The JTB hosted its own tradeshow, Jamaica Travel Market (JTM) on 27-28 September at the Luton Hoo Hotel, Golf & Spa. The two-day event focused solely on the island and provided the ideal B2B platform for British tour operators and agents to meet with Jamaican suppliers and partners directly.

UK/IRELAND

Events

Jamaica Travel Market (JTM) (27-29 September 2018) cont'd.

Finn UK drafted written materials to support the event. The agency also confirmed three media to attend. A showreel of Finn UK's PR plans and ideas was presented at the gala event.

World Travel Market (WTM) (5-7 November)

Finn UK arranged media meetings and interviews in key travel trade titles and broadcast for both Director and Minister whilst at WTM. They also invited a number of media to attend the on-stand cocktail reception on Monday 5th November.

Over 25 pieces of broadcast and print coverage were generated from WTM.

Other

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

Dublin Meet the Media (February 2019)

- Confirmed 20 media meetings and attended Dublin Meet the Media with JTB

X Factor Live Shows (February 2019)

- Confirmed four media and attended X Factor Live Shows

David Rodigan concert (March 2019)

- Confirmed two media and hosted David Rodigan Concert with JTB

Trade incentives and fams

- Finn UK has pitched images from fam trips and information about trade incentives to the travel trade media, resulting in print and online coverage



JAMAICA[®]
ONE LOVE

SALES ACTIVITIES

Great Huts, Port Antonio
Photo Credit: Jamaica Tourist Board

USA MARKET SUMMARY

The USA had phenomenal visitor arrivals in winter 2018, with arrivals far exceeding expectations, especially coming on the heels of the State of Emergency in Jamaica which was introduced earlier in the year. The team was, however, determined to attain the major task of producing the same growth, or even better, to exceed that achievement in 2019.

There were already some positives working in favour of the US:

- A strong US economy
- Increase in airlift
- Strong brand positioning
- New hotel rooms
- A stronger outreach to retail travel agents

The US team had an aggressive sales plan with tactical objectives and strategies to realise and exceed the targets set.

Traditional methods in targeting our Jamaica Travel Specialists (JTS), along with the use of social media channels, helped to propel the team's efforts in keeping Jamaica top-of-mind. No stones were left unturned and the arrival figures validated the strength of the JTS USA Team.

The activations below provide further details.

Our Objectives

- Meet and exceed the target set for visitor arrivals
- Maximise online service experience
- Increase the number of graduates and the number of agents recording their bookings in the Jamaica Travel Specialist, One Love Rewards Programme
- Increase consumer awareness of the destination's product offering

- Add new tour operators and participate in more industry events to expose the destination to new tour operator partners
- Attend honeymoon/bridal shows to target clients of this recession-proof market
- Target and encourage the diaspora to vacation in Jamaica
- Continue to promote local sporting events
- Increase visibility at shows targeting cruise passengers

Superior Online Service Experience

With the level of technological tools now available, connecting with travel agents is much easier. We continuously improve on how we engage with travel agents, with personalised communications through multiple channels, making their experience increasingly simple and efficient.

Key Online Platforms

www.oneloveagents.com is our 'always on' communication portal from which the travel agent community will have access to trade and consumer activities, product updates, tips and alerts, and blog-like conversations to engage with the sales team and each other.

Jamaica Travel Agent Training Webinars Series

Our webinar series provided a platform for Tour Operators and Jamaica supplier partners to showcase and share their offerings with the trade community. We saw an increase in participation in 2018/2019, with as many as 800 travel agents attending some sessions. We also introduced 'on location' shooting for the webinar to elevate the presentation to the agents.

JTB Product Update

- Fall/Winter Sales Calls Blitzes
 - Blanket the Northeast and Midwest (winter markets) with sales calls blitzes, in partnership with supplier and tour operators
- Spring Blitzes
 - Series of events throughout the entire US regions
- JTB Seminars and Workshops
 - Series of events across the entire US regions with a more experiential format. Agents were fully immersed into a Jamaican atmosphere through music, vibe and action

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

A total of 135 activations were completed. This resulted in over 4,038 agents attending JTB seminars; 1,073 agencies were visited during sales calls blitzes; and 822 reservation agents were updated on the product.

Familiarisation (fam) Trips

These were key as we continued the process of educating and updating the Jamaica Travel Specialists on the Jamaica product. This year, we focused more on experiential tours, which provided the agents with a full itinerary that their clients could expect to experience. The designated fam tour months are September and October. Separately, JTB worked closely with our tour operator partners in organising fam tours.

Nineteen (19) fam trip rotations were completed and over 226 travel agents were updated on the product. The travel agent community received full updates on the island during the tours.

Independent site inspections by agents while on personal visits to the island are becoming increasingly popular. Our office worked closely with the JTB

Montego Bay office in the execution and the agents were very pleased with the arrangements.

The Jamaica Travel Specialist Programme

This programme 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. Plans are on the way for re-launching the French version of the programme.

Benefits of the Programme

- Certificate of graduation as a Jamaica Travel Specialist
- 3 CEU credits from The Travel Institute
 - Details on the certification programmes, eligibility for continuing education credits and how to receive these credits following graduation can be found at www.thetravelinstitute.com
- Monthly cash reward for the Top-Booking Travel Agent
- Points earned to shop in the Online Rewards Store
- JTB VIP Arrival Courtesies at Sangster International Airport for specialists and bride/groom clients
- 50% discount at Club Mobay and Club Kingston (arrivals/departures)
- Independent site inspections
- Listing on visitjamaica.com
- Jamaica's Monthly E-Newsletter
- Top 50 agents and companions invitation to annual One Love Affair awards ceremony
- Increased programme awareness through the JTB sales team
- Consumer leads for the Jamaica Travel Specialists

USA MARKET SUMMARY

The Jamaica Travel Specialist Programme cont'd.

Bi-weekly webinars hosted by JTB, our supplier partners and tour 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 agents can maximise their rewards for recording their bookings.

A total of 29 webinars were completed during the reporting period, with some 5,440 agents being updated on the product. Incentives offered by our supplier partners during the sessions usually resulted in peaked interest by the travel agents.

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. Currently there are over 39,000 registered Jamaica Travel Specialists.

This webpage serves 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, and restaurants as they open, are renovated, expanded or rebranded
- Guide agents on how to keep in touch with our team members in our corporate offices and in the field, as well as access services provided for them by the JTB

- Alert agents to items of interest to them and their clients to maximise 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 BDO’s activities pertaining to Jamaica Travel Specialists
- The eNewsletter has an average monthly open rate of over 31% (Industry average: 21.8%)
- The eNewsletter has an average monthly click rate of over 24% (Industry Average: 6.7%)

Education/Training

Secured additional Jamaica Day events with Tour Operator partners’ reservations agents to improve destination awareness and experience through food, music and cultural exchanges. Hosted familiarisation trips on island to support the scheduled Jamaica Day events in-house. This further strengthened the destination experience and created a more lasting impression for agents.

New Tour Operators

Established more relationships that encouraged new tour operators to contract with hotel partners and create more visibility for the destination through individual promotions and marketing platforms. Attended United States Tour Operators Association (USTOA) and identified niche tour operators.

Bridal/Weddings/Honeymoons

Continued to participate in shows for this recession-proof market which remains one of our most targeted niches. The JTB team attended over 32 major bridal shows and networked with some 26,583 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

Participated in diaspora sponsored events to encourage destination weddings, family reunions, church conferences, etc. We renewed our efforts to engage the diaspora by organising regional connections with the members.

This 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 54,823 individuals to vacation at home and also to be ambassadors at their place of employment, in getting their co-workers to also experience Jamaica.

Sporting Events

JTB participated in several sporting activities through the year - the Annual Penn Relays, golfing events, partnership with Reggae Marathon at 5 major events in the Northeast & Midwest, and a national golfing tournament in Jamaica. Over 203,000 sports enthusiasts were informed of sporting events in Jamaica and received general information on vacationing in Jamaica.

Trade Shows

Continued partnership with our trade partners at their product launch events gave JTB representatives the opportunity to attend some 136 shows attended by 15,398 agents. Agents were updated on the Jamaica tourism 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 their preferred destinations. JTB's participation at consumer shows therefore remains a priority. During this reporting period, JTB was present at over 70 festivals, concerts, etc. where we were able to inform some 304,796 potential visitors about Jamaica as the preferred Caribbean destination to enjoy a vacation.

National Shows

The Board participated in 12 trade/consumer shows where Jamaica's tourism product was showcased to some 7,889 trade and 2,846 consumers.

Cruise Passengers

Increased participation at events targeting cruise clients – e.g. Cruise 360, Cruise Lines International Association (CLIA) sponsored events.

Groups & Conventions

It was an exciting year for the Jamaica Tourist Board Groups & Conventions Department as the MICE team made every effort to keep Jamaica top-of-mind for planners/buyers, while trying to focus their attention on the Montego Bay Convention Centre and other products.

Jamaica is in vogue and although the State of Emergency during the period did cause some concern among planners, especially in Canada, the destination has proven itself to be quite resilient. Coupled with the efforts of the JTB to always address issues, this has helped Jamaica to manage unexpected challenges.

JTB Meeting, Incentives, Conventions and Exhibitions (MICE) Strategy

- Activate JTB's Groups & Conventions road shows
- Schedule immersion fam trips and site visits
- Participate in key industry shows (IMEX, IBTM, M&I, etc.)
- Host a major faith-based association conference - RCMA Aspire Regional

Began sales efforts in Montreal, Canada with the Meetings & Incentives Forum from April 4-7, 2018, where JTB representatives met with 41 qualified buyers (corporate and incentive) who book the Caribbean. This was followed on April 9th by luncheon/training and calls on top accounts in Montreal, Quebec with Louise Paquette.

USA MARKET SUMMARY

Groups & Conventions cont'd.

JTB MICE Strategy cont'd.

JTB Groups & Conventions Road Show was launched May 21-24, 2018 in an effort to take our message to the market with a team of ten supplier partners. We targeted the Midwest cities of Chicago, Minneapolis and Saint Louis with in-office presentations and evening events.

The series launched in Chicago on a high note, as planners were treated to an evening at the famous Wrigley Field. Following the presentation, the team was able to engage with over 60 planners as they discussed business while they watched the Chicago Cubs play at home.

Immersion Fams helped to update planners. While on the road, we identified the top accounts at our events and invited them to participate in upcoming immersions. Planners were encouraged to also invite clients who were sourcing warm weather destinations to participate, and Jamaica secured several group bookings from these efforts.

Industry Shows help to position the destination in the eyes of planners. Jamaica participated in 15 major shows primarily comprised of scheduled appointments where we were able to meet, discuss the destination and generate leads or provide assistance for groups booked to Jamaica. Participating in these events also helps us to meet new planners with the potential to sell our island.

The MICE department worked closely with the JTB Latin America representative and his team in Latin America, participating in the IBTM Americas show from September 3-7, 2018 in Mexico City. JTB had the support of Half Moon, Moon Palace Jamaica, The Montego Bay Convention Centre and Glamour DMC, collectively engaging with over 300 planners in an effort to secure business for the destination. Supplier partners from the island were with us in Mexico City to arrange Jamaica MICE events and showcase our own product offerings.

Following the completion of IBTM Americas, the following activity was confirmed by the JTB Latin America representative and his team at GMS Marketing on behalf of the JTB Groups & Conventions Department:

Religious Conference Meeting Association (RCMA) is the largest faith-based association for planners and suppliers in the USA. Jamaica was selected for their 1st International Aspire Regional Conference held in Montego Bay from October 29 - November 1, 2018.

This was the first time that the association had taken their RCMA Aspire Conference outside of the US and the Jamaica Tourist Board, Hilton Rose Hall, Montego Bay Convention Centre, Half Moon, Iberostar, Jamaica Tours Limited, Island Routes, AmStar DMC and Chukka Caribbean Adventures, all joined in support to sponsor this event on island.

Jamaica attracted 60 buyers along with suppliers from Jamaica and the US. The event was considered to be an overwhelming success by all who participated. The outlook remains positive for Jamaica and our MICE market as we continue to work closely with planners/buyers from incentive houses, third-party companies and the CVENT RFP Portal in the interest of our local suppliers.

Completed Activities with Results: April 2018 - March 2019

- JTB Groups & Conventions Road Show
– 200 planners/buyers
- Industry shows
(trade expo/suite appointments)
– 15 industry shows and
1,500 planners/buyers
- Fam trips/site inspections
– 3 fams totalling 50 planners/buyers
- RCMA Aspire Regional
(1st International Regional event)
– 35 faith-based planners/buyers

LATIN AMERICA

During the 2018/2019 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, the JTB representative conducted a series of targeted events that included breakfasts, fam trips, trainings, seminars and sales missions.

Some challenges:

- Extremely high airfares, pricing us out of the market
- Recession across the region
- Political change in the US 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:

- A greater focus on partnerships with hotels and airlines
- New airlift
- Increased co-op activity with key tour operators, a first-time trade advertising campaign and successful sales missions across key markets

Activity metrics for the region during the April 2018 - March 2019 period included:

	EVENTS	ATTENDEES
JTB TRADE EVENTS & SALES MISSIONS	74	2,274
CONSUMER SHOWS	5	24,091

CANADA

Highlights

Increased visitor arrivals by 9.5% in 2018 over 2017.

Jamaica Tourist Board, Canada, received the award for 'Tourist Board of the Year in Canada', at the first-ever TravelPulse Canada Readers' Choice Awards gala event.

The Jamaica Tourist Board Canada team accepted the award for Jamaica as 'favourite destination' at Baxter Media's first annual Agents' Choice Gala event, where they presented the 2018 Agents' Choice awards to favourite suppliers in 43 categories.

Activities Overview

Travel Agents

- Successfully hosted three destination showcase events in three major regions, engaging approximately 500 travel agents; 27 local and overseas suppliers also participated.
- Successfully hosted sixteen destination product update seminars across the country, engaging approximately 1,000 travel agents. 27 local and overseas suppliers also participated.
- The incentive programme for agents with monthly prizes for booking Jamaica was part of the ongoing Jamaica Travel Specialist Programme.
- JTB Canada made 1,268 sales visits to travel agencies across Canada, reaching 3,640 agents.
- JTB Canada produced 11 of the top 50 selling Jamaica Travel Specialists for 2018.
- JTB Canada participated in over 50 trade shows and engaged over 15,000 retail travel professionals directly.
- Fam trips are still very effective. Agents sell what they have experienced. We hosted 112 travel agents and 7 meeting planners on 9 fam tours.

CANADA

Activities Overview

Travel Agents cont'd.

- Over 15,000 travel agents were engaged through our very popular “The Jamaican” newsletter.

Social media continues to increase our interaction with trade and consumers.

Airlines/Tour Operators

Ongoing alliances continued with our four major airline and tour operator partners - 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 centres' training was also included in B2B activities. JTB Canada participated in 39 tour operator product launches in the provinces of Ontario, Quebec, Alberta, Halifax, and Manitoba.

On December 16, the inaugural Swoop flight from Hamilton, Ontario to Montego Bay was fully booked with 191 passengers. Swoop, JTB and Hamilton Airport offered all passengers goody bags, and there was a raffle for prizes. The usual welcome and fanfare was arranged for the flight upon arrival at the MBJ airport.

For the period December 2018 to April 2019, Swoop airlines operated 39 flights, with a capacity of 7,371 seats, carrying 4,652 passengers for a load factor of 63.1%.

WestJet YYC Inaugural flight to Montego Bay Event – Winter 2018/19

JTB hosted this event at MBJ with a reggae band to celebrate the new non-stop flight from Calgary/MBJ. There were 158 passengers on board the aircraft.

Consumer Direct Events

- Maple Leafs Sports & Entertainment (MLSE)
- Jamaica Night at the Toronto Maple Leafs Hockey Game

- Jamaica Night at BMO Field in Toronto
- KiSS 105.3 Sudbury “Jammin’ in Jamaica”
- Kingston City Marathon Media Launch
- Radio Broadcasts live from Jamaica - G98.7FM
- G98.7 is the top diaspora radio station in Toronto. They conducted several on-location radio broadcasts live from Jamaica, promoting the destination and travel from Canada to Jamaica. Host hotels were Melia Braco Village Resort and Royalton White Sands
- KISS 92.5FM “Daryn Jones in Jamaica” four-week radio promotion radio and digital B2C promotional campaign
- During the contest execution phase (January 7-18), listeners called in for a chance to win one of 10 all-inclusive trips for two to Jamaica, including a “come along” component for radio listeners. JTB partnered with Transat, Moon Palace Resort and Trip Central on this promotion. Total listener reach in Toronto: 3.5M listeners. **Full coverage reach: 4.5M listeners**
- Horizon Media Promotion – Toronto
- CP24 promotion/Jamaica contest – Toronto
- The JUNOS outdoor Ad. Truck – London, Ontario

Summary

For the period under review, JTB Canada:

- Participated in over 85 consumer shows and directly engaged approximately 3 million consumers
- Participated in 20 bridal shows, which allowed for interaction with over 60,000 future brides across Canada
- Conducted a series of social media promotions that engaged over 7 million consumers
- Participated in 8 diaspora initiatives across Canada, with a direct reach of 30,000 diaspora members



SUNWING AIRLINES INCREASES SEATS TO JAMAICA - Following their meeting, Minister of Tourism, The Honourable Edmund Bartlett (left) and Director of Tourism, Donovan White (right) pause for a photo with Stephen Hunter, CEO & President at Sunwing (centre). Photo Credit: Jamaica Tourist Board.

UNITED KINGDOM

During 2018-2019, the JTB London office was actively involved in numerous consumer shows, trade shows, and other events, including the activities and promotions as summarised below.

Fam Trips – 10 Fam Trips

83 travel agents were hosted across ten fam trip visits.

All were 'Sell it and See it' themed fams on regular destination updates; however, one was dedicated to romance, one to luxury, and two were dedicated to Thomas Cook to support the Manchester service that will begin in May 2019. Five of the participants were top sellers from our Jamaica

Rewards programme, who attended “**The White Affair**” at Excellence Oyster Bay.

Trade Seminars – 47 Events

- Over 3,000 travel agents and wholesaler reservation staff across the UK and Ireland were updated on destination JAMAICA in the reporting period. The team continued to plan and attend informative destination updates to drive trade awareness across all markets.
- The seminars and blitzes were arranged as part of the sales team's ongoing engagement with the retail trade, reaching high end sellers and tour operators and significantly higher numbers of Not Just Travel and other homemaker groups.

UNITED KINGDOM

Trade Seminars – 47 Events cont'd.

- Five webinars were held during the period, targeting homeworkers.
- A sales mission targeting agents and tour operators in Sweden and Denmark was also held.

Trade Shows – 11 Events

- Advantage Travel Conference – May 2018
- Travel Designer Travel Show – September 2018
- Travel Weekly Northern Ball – September 2018
- Jamaica Travel Market – September 2018
- World Travel Market – November 2018
- Travel Counsellors Retail Conference – November 2018
- Not Just Travel Conference – November 2018
- Holiday World Trade day at RDS – January 2019
- The Leicester Holiday Show – February 2019
- Destination Caribbean Showcase – February 2019
- Unite Caribbean – March 2019

Tour Operator Launches – 2 Launches

- CaribTours Belfast and Essex Brochure Launch, October 2018

Product Launches – 2 Launches

‘Come Dine With Me’ – a Jamaica update and social in collaboration with St. Kitts and Antigua was launched in December 2018, targeting agents and media.

‘Jamaica Cake Fest’, a competition to engage with the diaspora, was also launched in December 2018. Travel agents who have visited Jamaica also participated in this event.

Sales Calls – 700 Sales calls

Regular blitzes across all the key UK cities took place during 2018 - 2019 and the Jamaica Rewards portal continues to be the main vehicle for online engagement and rewards.

The team continues to target agents/sellers to develop stronger relationships with top retail sellers and has begun hosting monthly themed webinars (Q4) to reach more reservation staff and homeworkers.

CONTINENTAL EUROPE

(East, West, Central & Southern)

The fiscal growth from Continental Europe was relatively flat, with the top 10 markets together contributing to 1% growth over the previous year. The main contributory factor was airlines pulling back on recent increases in seat allocation without much time for these to effectively develop. Eurowings pulled their capacity down from three flights per week in the Summer of 2018, to two through the Winter, and TUI Netherlands and Poland also reduced recently increased flight capacities mid-season.

The resurgence of North Africa, and Turkey returning with very low rates in the market, as well as the USD to EURO remaining very strong throughout the year, were contributory factors to the flat growth. Other contributory factors were closeouts, especially during the high winter months, (to European tour operators from hoteliers).

Last winter saw the return of a Russian charter operation by Pegas Touristik, which single-handedly grew the Russian market by 364% over the previous year.

Top ten countries for arrivals

RANKING	COUNTRY	2017/18	2018/19	+/- %
1	Germany	32,022	33,931	+6%
2	Italy	14,066	13,581	-3%
3	France	8,154	9,076	+11%
4	Netherlands	8,962	8,183	-9%
5	Spain	7,794	6,876	-11%
6	Belgium	6,352	6,522	+3%
7	Russia	1,152	5,134	346%
8	Switzerland	4,145	3,630	-12%
9	Portugal	3,688	3,447	-7%
10	Poland	6,209	3,316	+13%

The JTB's Berlin office representatives participated in more than 15 trade and consumer shows, which attracted over 1.8 million attendees across Europe. Among the corridors of Internationale Tourismus-Börse Berlin (ITB Berlin), Europe's leading trade show, the JTB acknowledged its main European partners for the first time in an awards event dubbed 'Jamaica Night – A Celebration to Recognise Excellence'. Over 200 guests were in attendance, and eight presentations were made to tour operators, airlines, television representatives and journalists by our Minister of Tourism, The Honourable Edmund Bartlett.



Other activities included seminars, workshops and

training sessions, of which 82 were conducted, with over 7,759 attendees. Familiarisation (fam) and press trips for key and emerging markets were also organised. There were 21 fam trips with 284 participants, and 10 press trips for 21 journalists. Approximately 80 travel agents from Eastern Europe and Russia were on island in November 2018, and there was a notable trip to Jamaica in October 2018 of the German football team, 'Roter Stern Kickers' of Hamburg.

The JTB participated for the first time in a major MICE event in Poland, 'Meet the Bidder' which attracted a record 100 exhibitors. The JTB also supported at least 2 diaspora events which attracted approximately 250 participants. There were a total of 65 press releases and 14 print advertisements.



Our five tourism support and sponsorship initiatives included:

- **Top Up Dance** – Germany
- **Ostroda Reggae Festival** – Poland
- **Delicanto (Culinary)** – Germany
- **Fête de la Musique** – Germany
- **Carnival of Cultures** – Germany

SALES ACTIVITIES cont'd.



Out of Home (OOH) ads on taxicabs during Internationale Tourismus-Börse Berlin (ITB Berlin)
Photo Credit: Jamaica Tourist Board

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/Austria/Switzerland**
 - Grafenstein Freizeit-und-Tourismuswerbung GmbH (Contract ended July 31, 2018)
 - Fastforward Marketing (Contract effective September 1, 2018)
- **Spain & Portugal**
 - Interface Tourism Spain (Contract ended July 31, 2018)
 - Sergat Spain (Contract effective September 1, 2018)
- **France**
 - Keys by Indigo (Contract effective September 1, 2018)
- **Italy**
 - Interface Tourism Italy
- **Holland/Netherlands/Belgium**
 - Hans van Wamel/Color Travel Services
- **India**
 - TRAC Representation (India) Private Ltd.
- **China**
 - China Business Network



JAMAICA[®]

ONE LOVE

PERFORMANCE IN THE MARKETPLACE

PERFORMANCE IN THE MARKETPLACE

UNITED STATES

Travel by 41.8 million US citizens during January and December 2018 to overseas regions indicates that outbound travel from the US increased by 9.0% when compared to outbound travel during the corresponding period in 2017. Travel to the Caribbean region increased by 4.6% during this period, reflecting a market share of 20.8% of the US outbound travel market overseas. Of the 93 million total outbound travellers for 2018, 51.3 million travelled to Canada and Mexico.

Pertaining to Jamaica, during the winter season (January - April), stopover arrivals in 2018 were 7.4% higher than those in 2017, and 19.5% higher than in 2010. In comparison to the 2017 winter season, stopover arrivals from all market regions recorded an increase in arrivals; the Northeast grew by 6.2%, the South by 8.6%, the Midwest by 8.2%, and the West by 7.6%.

For the summer period (May - December), the US market grew by 8.1% compared to 2017, and rose 37.0% over 2010. The summer period saw a total of 1,117,800 stopover arrivals. The strongest growth was recorded in the Southern region, with 318,545 arrivals up 9.8%, followed by the Western region (where the least US arrivals originate), with 153,703 arrivals, an increase of 9.6%. The Northeast region (where the most US arrivals originate), recorded 468,906 arrivals (up 7.3%) and the Midwest region, with 176,646 arrivals, recorded an increase of 5.7%.

The Northeastern and Southern regions contributed 68.6% of the US stopover visitors to Jamaica during 2018. This represents 3.6 percentage points less than its 72.2% contribution in 2010. The Midwest region contributed 18.8% of the stopover arrivals and the remaining 12.6% of the stopover visitors came from the Western region. The Northeast market region (with 682,966 arrivals) increased by 6.9%, the South (with 434,137 arrivals) increased by 9.5%, the Midwest (with 305,937) grew by 6.7% and the Western region (with 205,362) increased by 9.1%.

Overall, arrivals from the US market increased 7.8% over the 1,509,963 stopovers in 2017 (with 1,628,402). This performance reflects 15.8% more arrivals than the 1,406,058 arrivals recorded in 2016, and 21.1% more than the 1,344,149 arrivals in 2015.

US Visitor Summary

- The average length of stay for foreign national US visitors in 2018 was 6.8 nights, which is lower than the average of 8.1 nights for all visitors.
- In 2018, a total of 1,250,896 or 76.8% of US visitors came to Jamaica for leisure, recreation and holiday; 249,876 or 15.3% came to visit friends & relatives; 44,141 or 2.7% came on business; and 83,489 or 5.1% came for other or unstated purposes.
- The annual average growth rate for visitors from the US over the past four years (2014 - 2018) was 5.9%.
- In 2018, the age distribution of US stopover visitors indicated that 10.4% were less than 18 years old, 6.9% were between 18 - 24 years, 48.2% were between 25 - 49 years, 25.2% were between 50 - 64 years, and 9.2% were over 64 years.
- The gender mix of visitors from the US was 702,201 males (43.1%) and 926,201 females (56.9%). The gender ratio of visitors from the US was 122 females per 100 males.
- The peak periods of US stopover visitors to Jamaica in 2018 were: Summer (June - July), Easter (March - April) and Christmas (December). The months with the highest numbers of stopover arrivals in 2018, in descending order, were: July, June, December, March, and April. This pattern has been holding strong for the past four years (2014 - 2018).
- The most popular resort region for US stopover visitors in 2018 was Montego Bay, with 608,667 or 37.4% visitors. Ocho Rios was host to 22.2% or 361,395 visitors from this market, and another 18.0% or 293,541 visitors stayed in Negril.

CANADA

Outbound trips reached an estimated 33,440 million in 2018. Arrivals from Canada in 2018 totalled 399,969, representing 5,205 fewer Canadian visitors to Jamaica than in 2017, a 1.3% decrease.

The Canadian market during the January - April 2018 winter period was at the 2017 level. A total of 172,052 stopovers came from that market compared to 172,077 in winter 2017. This is still 39,873 stopovers below the record number of 211,925 that came in the winter of 2012. Two months of winter recorded increases: January (2.0%) and April (2.6%), while February (3.5%) and March (0.9%) recorded declines.

This up and down trend continued during the summer period (May - December 2018), with a total of 227,917 stopover arrivals, compared to the 233,097 arrivals in the summer of 2017. The growth rates ranged from a high of 8.1% in August 2018 to a low of -16.7% in September 2018.

The main province of Ontario contributed 281,552 or 70.4% to the Canadian stopover arrival total, a decrease of 0.6% over the 283,294 visitors who came from that province in 2017. Quebec, the second leading visitor producing province (with 12.8% of visitors), produced 5.6% more stopovers. Of the other two leading provinces, Alberta declined by 9.2%, and British Columbia increased by 1.3% in 2018 compared to 2017.

Canada Visitor Summary

- The average length of stay for foreign national Canadian visitors in 2018 was 8.6 nights.
- In 2018, a total of 326,636 or 81.7% of Canadian visitors came to Jamaica for leisure, recreation and holiday; 51,973 or 13.0% came to visit friends & relatives; 7,503 or 1.9% came on business; and 13,858 or 3.5% came for other or unstated purposes.

- The annual average growth rate for visitors from the Canadian region over the past four years, from 2014 to 2018, was -1.2%.
- January through March, and December were the peak months for visitor arrivals from Canada in 2018. This coincided with the cold winter climate experienced in Canada during this period.
- In 2018, the age distribution showed that 13.7% of visitors were under 18 years old, 5.7% were 18 - 24 years, 43.6% were 25 - 49 years, 27.5% were 50 - 64 years, and 9.5% were 65 years and over.
- The gender mix of visitors from Canada was 185,263 males (45.7%) and 219,911 females (54.3%). The gender ratio of visitors from Canada was 119 females per 100 males.
- The most popular resort region for Canadian visitors in 2018 was Montego Bay with a total of 139,972 or 35.0% visitors. Ocho Rios was host to 28.5% or 113,853 visitors from this market, and another 20.3% or 81,154 visitors stayed in Negril.

UNITED KINGDOM/ EUROPE

The number of visits abroad by UK residents fell by 1.4% (from 72.8 million in 2017) to 71.8 million in 2018. This negative growth occurred in relation to a decline in visits to Europe of 1.5%, and to other countries by 2.7%, while visits to North America grew by 2.5%.

Stopover arrivals to Jamaica from the European region recorded minimal growth in 2018. Arrivals from Europe increased by 0.8% in 2018, moving from 325,804 arrivals in 2017 to 328,369 arrivals in 2018. The United Kingdom, Germany, Italy and The Netherlands are the most important visitor producing countries within this regional market, in descending order of importance.

UNITED KINGDOM/ EUROPE cont'd.

United Kingdom Visitor Summary

- The United Kingdom, with 215,584 stopover arrivals, registered a decrease of 0.9% over the 217,647 recorded in 2017. The performance for winter was down by 3.0%. This trend continued in the summer with a slightly lower level of decreases to end the season at the same level as in 2017.
- July, August and December were the peak months for visitor arrivals from the UK in 2018, with July being the highest month with 21,444 visitors.
- The average length of stay for foreign national UK visitors in 2018 was 14.4 nights, which is higher than the average of 8.1 nights for all visitors.
- In 2018, a total of 143,406 or 65.8% of UK visitors visited Jamaica for leisure, recreation and holiday; 53,965 or 24.8% visited friends and relatives; 7,940 or 3.6% came on business; and 12,668 or 5.8% visited for other or unstated purposes.
- The annual average growth rate for visitors from the United Kingdom from 2014 - 2018 was 8.7%.
- In 2018, the age distribution showed that 13.2% of visitors were under 18 years old, 7.0% were 18 - 24 years, 40.3% were 25 - 49 years, 29.5% were 50 - 64 years, and 9.9% were 65 years and over.
- The gender mix of visitors from the UK was 96,880 males (44.9%) and 118,704 females (55.1%). The gender ratio of visitors from the United Kingdom was 123 females per 100 males.

- The most popular resort region for UK visitors in 2018 was Montego Bay with a total of 60,210 or 27.9% visitors. Ocho Rios was host to 24.9% or 53,291 visitors from this market, and another 19.6% or 42,201 visitors stayed in Negril.

CONTINENTAL EUROPE

Germany continues to be the leading visitor-producing country from Continental Europe. With a total of 34,255 stopover arrivals in 2018, the German market grew by a notable 14.7% over the 29,858 recorded in 2017. This is still below the peak of 43,018 German visitors recorded in 1998.

During 2018, Italy was the second main visitor-producing country from Continental Europe with 13,721 arrivals, an increase of 0.2%; however, this is still below the 29,187 Italian arrivals recorded in 1992.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway and Sweden), represents 68.6% of the total European market.

The performance of the other European countries, albeit small numbers, recorded mixed growth in 2018 compared to the corresponding period in 2017.

The average length of stay for Continental Europe as a group was 11.2 nights.

LATIN AMERICA

Latin America continues to be a market which holds much potential for Jamaica. Stopover arrivals from Latin America increased by 5.3%, moving up from 32,224 in 2017 to 33,922 in 2018, and were 11.1% higher than in 2013 when the highest number of 30,538 arrivals were recorded.

The annual average growth rate for visitors from Latin America from 2014 - 2018 was 3.8%.

July, August, January, and May were the peak months for visitor arrivals from Latin America in 2018, with July being the highest month with 3,339 visitors.

Of the top three visitor-producing countries in the South American sub-region, Argentina with 5,774 visitors increased by 4.1%; Chile with 5,480 visitors rose by 4.2%; and Brazil with 5,287 visitors decreased by 0.3%.

From the Central American sub-region, Mexico with 3,866 visitors increased by 0.5%; Panama with 2,328 visitors, increased by 9.8%; and Costa Rica with 1,262 visitors, increased by 11.0%.

In 2018, the age distribution of Latin American stopover visitors indicated that 13.2% were under 18 years old, 7.0% were 18 - 24 years old, 40.3% were 25 - 49 years old, 29.5% were 50 - 64 years, and 9.9% were 65 years and over.

The most popular resort region for Latin American visitors in 2018 was Montego Bay with a total of 13,136 or 38.7% visitors. Kingston was host to 22.1% or 7,501 visitors from this market, and another 19.4% or 6,569 visitors stayed in Negril.

CARIBBEAN

Arrivals from Caribbean territories to Jamaica increased in 2018. Jamaica welcomed 67,495 arrivals from this market, which total 264 more than the peak of 67,231 Caribbean nationals who visited Jamaica in 2008 – a 5.6% increase over the 63,944 who visited in 2017.

The annual average growth rate for Caribbean visitors from 2014 - 2018 was 3.4%.

In 2018, July, August, and December were the peak months for visitor arrivals from the Caribbean, with July being the highest month with 7,728 visitors.

The Cayman Islands, with 18,701 stopovers, Trinidad and Tobago with 11,255, The Bahamas with 5,925, Barbados with 4,686, and Cuba with 3,740 arrivals, continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 44,307 stopovers or 65.6% of the total Caribbean arrivals.

In 2018, the age distribution shows that 9.6% of Caribbean visitors were under 18 years old, 6.2% were 18 - 24 years, 55.0% were 25 - 49 years, 23.5% were 50 - 64 years, and 5.7% were 65 years and over.

The gender mix of visitors from the Caribbean, was 33,567 females (51.4%) and 31,786 males (48.6%). The gender ratio of visitors from the Caribbean was 106 females per 100 males.

The most popular resort region for Caribbean visitors in 2018 was Kingston, with a total of 31,312 or 46.4% of visitors from the Caribbean. Montego Bay was host to 12.9% or 8,710 Caribbean visitors and another 9.1% or 6,120 stayed in Ocho Rios.

OTHER COUNTRIES

China, Australia, Japan and India are the main visitor-producing countries from other parts of the world. Compared to 2017, China with 3,431 stopovers, fell by 11.8%; Australia, with 2,307 stopovers fell by 10.4%; Japan with 1,587 stopovers, was down by 14.2%; and India with 1,528 stopovers, grew by 16.7%.

CRUISE PASSENGERS

According to the Florida-Caribbean Cruise Association (FCCA), 28.2 million passengers sailed the global oceans in 2018, up 5.6% from the 26.7 million passengers in 2017. In 2018, the growth of the cruise industry showed sustained consumer interest in cruising (an industry where the demand continues to outpace supply), as the annual occupancy again exceeded 100%. During the period, nine new ocean-going vessels with 32,000 lower berths and an investment of more than US\$7.4 billion were added.

The current cruise ship order book extending through 2027 includes 72 new builds, with over 240,000 lower berths at a value of over US\$57.6 billion.

Today's cruise ships offer a world of innovations that align with cruise lines' brands - from sky-diving, go-karts and rollercoasters, to celebrity chefs, breathtaking spas and all-suite staterooms. While catering to everyone from multi-generational families to solo cruisers, and offering ways to personalise and maximise one-of-a-kind, once-in-a-life-time vacations through new technologies with customisable experiences, cruise ships' facilities and services continue to exceed the expectations of a growing population of travellers, 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 traveller.

The Caribbean continues to lead as the number one cruise destination, accounting for more than a third (34.4%) of the entire global deployment capacity market share. Passenger numbers for the Caribbean continue to be consistent and high, despite other rising cruise destinations.

Jamaica recorded a decline in cruise passengers during 2018 from 551 ship calls. The total of 1,845,873 cruise passengers who visited our shores was a 4.0% decrease over the 1,923,274 recorded

for the corresponding period in 2017. Seasonally, cruise arrivals recorded an increase of 4.9% in the winter period (January to April) with 812,777 cruise passengers, up from 774,519 for 2017. During the summer period (May to December), with the exception of the months of May which recorded an increase of 12.7% and December which recorded an increase of 8.8%, every other month recorded declines in cruise passenger arrivals, ranging from a decline of 36.5% in September to a decline of 1.2% in June.

During the months of September, October and December of 2017, Jamaica was a recipient of ships that were diverted from the Eastern Caribbean when several islands had major damage to their ports and destinations after the hurricanes. Therefore, the performance of this summer period with a total of 1,033,096 cruise passengers was 10.1% lower than the 1,148,755 passengers in 2017.

The port of Falmouth contributed 744,671 cruise ship passengers or 40.3% of total passengers to Jamaica from 161 cruise ship calls. The port of Ocho Rios, which in the past provided the largest share of Jamaica's cruise arrivals, accounted for 586,715 or 31.8% of the 1,845,873 who arrived at our shores in 2018. The port of Montego Bay accounted for 512,563 passengers or 27.8%.

The cruise ships carrying the most passengers to Jamaica in 2018 were all from the Royal Caribbean Cruise family of ships (the Oasis of the Seas, Harmony of the Seas, and Liberty of the Seas) all calling to the Port of Falmouth. The Oasis of the Seas made 22 calls with 138,525 passengers. The Harmony of the Seas made 20 calls with 127,144 passengers, and the Liberty of the Seas made 26 cruise ship calls and provided 113,319 passengers. The combined total of 378,988 cruise passengers from these three ships represents 20.5% of Jamaica's total cruise passenger market.



JAMAICA[®]

ONE LOVE

ON THE HOMEFRONT

Round Hill Hotel, Hanover
Photo Credit: Jamaica Tourist Board

JAMAICA

The headquarters of the Jamaica Tourist Board (JTB) has oversight of the operations of the agency and houses among others, the Marketing Department. The department supports the initiatives of the overseas offices and public relations and advertising agencies in developing campaigns and promoting Jamaica's tourism interests.

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 among which are Destination Marketing, Marketing Communications (covering Tourism Awareness and the Clive Taffe Information and Resource Centre), Digital Marketing, Promotions and Events, and Research & Market Intelligence.

DESTINATION MARKETING

Annual Highlights:

- New Brand Platform: *Research & Development*
- Pre-Campaign Activation: *JAMAICA One Love*
- Digital Content Series: *Join Me in JAMAICA*
- Promotions & Events: *100+ Events Supported, Managed or Executed*
- Cruises & Attractions: *4 World Travel Awards in 2019*

Goals

- Leverage brand awareness and association to develop new brand platform
- Strengthen market leader positioning in existing markets
- Establish new audience targets within core and emerging markets
- Deploy market research to inform new marketing strategy and campaign development
- Support efforts to increase visitor arrivals to Destination JAMAICA

As the English Caribbean region's leading destination marketing organisation, the JAMAICA Tourist Board (JTB) started an extensive renewal of global marketing efforts to develop a new brand marketing platform that aligned with current and future trends, strengthened industry partnerships and invested further in brand equity.

Through an extensive procurement process, Beautiful Destinations was selected as the advertising agency of record to develop brand Destination JAMAICA's new marketing platform. The strategy included research of core and emerging markets, as well as the strategic development of new advertising collaterals with the JTB Marketing Department.

Prior to the selection of Beautiful Destinations, the destination was promoted as the *Home of All Right*. However, in the latter part of 2018, an interim integrated marketing campaign was quickly developed with the tagline *JAMAICA One Love* and utilising the *Home of All Right* creative assets. Specifically, *JAMAICA One Love*, leveraged the existing television commercial from the *Home of All Right* campaign with the new tagline *One Love*, updated script, and aired in the US, Canada and UK markets. Additionally, the music for the television commercial was replaced with a more up-tempo reggae track and the call-to-action was changed to drive traffic to a campaign-specific landing page.

The dynamic campaign landing page, www.visitjamaica.com/onelove, provided visitors to the site with market-specific booking partner deals. The primary focus of the *One Love* campaign was to increase consideration of potential visitors to the destination while driving booking referrals to partners in core markets of US, Canada, and UK. As of March 2019, the campaign landing page tracked over 350,000 visitors and over 16,000 click-through to the partner booking sites within a twelve-week period.

Expanding Market Coverage

The campaign focused on nine markets across the US, UK, and Canada. It was then expanded

into 16 markets in early 2019, and 18 US markets in Q2, national coverage in the UK and Canada, and into six new European markets.

An Emphasis on Digital Media

Targeted digital programmatic banners were launched in late 2018 before expanding in early 2019 to TV, Video on Demand, and native ads. In 2019, emphasis was placed on a data-targeted approach, with banners and native ads focused on reaching audiences in key markets, who were most likely to travel to the Caribbean or competitive destinations.

Paid Search

Paid Search launched late in March 2019 (tail-end of FY19), driving people to find out more information on Jamaica.

Beautiful Destinations Distribution

With 16 added value posts on Beautiful Destinations' social accounts, we garnered an additional 12.8M impressions and 5.6M social engagements to complement our paid activity. Given the large audience, these posts were strong awareness/engagement drivers, reaching a global travel audience and inspiring them to visit Jamaica.

Reintroduction of TV

After being dark for most of 2018, TV was key to keeping Jamaica top-of-mind going into 2019, with TV providing the broadest reach and market coverage of our tactics, promoting the island via sight, sound, and motion.

In the US, 2019 Television started strong, with fixed spots in the Super Bowl and the Grammys in key markets such as Baltimore, Detroit, and Minneapolis - supported by a data centric cable passport schedule, focused on high indexing cable nets against a Caribbean travel audience.

In Canada, local broadcast TV coverage began in 2019, highlighted by local spots in the Super Bowl. From a local TV market perspective, efforts were focused on Toronto and Montreal, along with Calgary, Edmonton, and Winnipeg in digital. Canada was our most efficient paid search market in 2019.

In the UK TV market, the focus was on the Greater London area, starting with local broadcast then shifting to local addressable cable targeting high HHI households who were likely to travel or have a passport. In digital, we expanded beyond London to Manchester, Midlands, Scotland (national), and Yorkshire.

Overall Results: December 26 (launch) - March 31 US/CA/UK

- **Total impressions: 90.4M**
- **Total clicks: 498K**
- **Booking engagements: 3,365**

The Digital Marketing 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 took the form of updating product, event and content listings to maintain accurate information on partner pages.

The social media strategy continued to highlight user-generated content via the JTB's social media platforms to engage with the digital communities and offer trip planning inspiration.

Throughout the year under review, Search Engine Optimisation (SEO) became a major focus of the organisation's curated content and partnerships, with the goal of placing higher in Google Search Engine Ranking Positions (SERP).

- **Facebook - 924,660 fans**
- **Instagram - 52,137 followers**
- **Twitter - 33,541 followers**
- **Youtube - 4,589 followers**

JAMAICA

**Overall Results: December 26 (launch)
- March 31 US/CA/UK cont'd.**

The new website www.visitjamaica.com, launched in 2017/2018, continued to serve as home base for all online and offline marketing of brand Jamaica. By employing dynamic landing pages to allow for languages, cultural nuances, target market, and relevant content, the website's utilities ushered in a new level of marketing competencies and support mechanisms to support the delivery of targeted content to the right audience.

Some Digital Marketing Initiatives

Join Me in JAMAICA

This campaign was a series of short documentaries featuring the unique people and places throughout the country. Phase 1 of the campaign was born out of an initiative to combat negative news brought on by the Montego Bay State of Emergency in February 2018. Eight one-minute videos were created and distributed via the organisation's social media channels, a dedicated website landing page, public relations and trade support. Phase 1 of the campaign ran for eight weeks from 5 April 2018 – 6 June 2018. The Phase 1 campaign's primary Key Performance Indicators (KPIs) were video views and social engagement, for which the results were 9,000,000 video views and 63,000 post engagements via owned social media engagement.

A second phase of the campaign was launched with an additional eight videos. Phase 2 had the added component of converting views and engagement to assisted sales leads. A programmatic and TripAdvisor media buy targeted video viewers and persons in the search to book planning stage with mixed video content and trip deals ads. A dedicated landing page dynamically served prospective travellers with region specific travel deals and click-through to a tour operator. This resulted in 4,600,000 video views, 4,000,000 post

engagements via owned social media engagement, and 43,000 booking referrals to tour operators.

Carnival in JAMAICA

To support increasing the visibility of Carnival in JAMAICA, a multi-channel campaign was implemented to highlight Kingston as an energetic, pulsating entertainment city, inviting visitors to the destination to experience the festivities. The four-month campaign included geo-targeted social and display advertising in the US, Canada, Caribbean and Latin American markets, creation of a robust organic social editorial calendar, and hosting travel/lifestyle influencers from the US and Canada to experience Carnival in JAMAICA first-hand.

Overall, the campaign resulted in more than 111,000 click-throughs to www.carnivalinjamaica.com, 4,000 clicks to individual band pages, and 13,200,000 social media impressions.

Promotions & Events Support

During the period, awareness and coverage of major events sponsored by the organisation was extended through the various digital and social channels. This support was typically provided in the form of social media awareness and live social media coverage.

Special Promotional Activities

Support was provided for activities in the marketplace as needed, primarily to heighten awareness of the wealth of experiences that are uniquely Jamaican and can stimulate travel to the island. This support included but was not limited to, vetting influencers, preparing and tracking analytics for campaigns, and conceptualising and working with the technical teams behind microsite development. These promotional activities include marketing campaigns such as the *Join Me in Jamaica* campaign, display campaign landing pages and dynamic campaign pages.

The digital marketing plan defined the channel strategy for each major market and travel persona to

provide focus and direction for the future. This plan was integrated with all marketing communications, sales processes and trade partners to align with mandated objectives.

Looking ahead, the overall objective is to create a quantifiable set of results for JTB marketing efforts - driving traffic to visitjamaica.com, employing strategies and tactics that segment users into defined user groups, and deploying relevant value propositions to nurture prospects and refer leads to travel agents and tour operators. A true attribution model that reports on real booking instances and deploys additional tactics has been established to give a full cycle view of our marketing impact on arrivals.

PROMOTIONS & EVENTS UNIT

EVENTS & SPECIAL PROJECTS

Events continued to be integrated into the JTB's marketing mix and were used as another marketing channel to provide additional "visitor pull". Events were also leveraged to generate positive international media exposure, as well as to provide content for the organisation's website, social and digital platforms.

The events selected for support were also incorporated in the organisation's JAMAICA Annual Events Calendar, which was shared as a product guide to the tourism 'sellers of travel' and other key strategic tourism partners, globally and locally. Annual major events also helped to build a lifetime relationship with global customers, which is a strong contributing factor to increased loyalty and repeat visitors to destination JAMAICA.

The unit continued with a JTB Board approved methodology to determine events to be supported, aimed at boosting tourist arrivals and raising Jamaica's global brand recognition above its competitors in the region.

Recommendations to support or decline events were provided by the Events Committee to the Chairman and Board of Directors. The Board approved some 52 events during this period, all of which contributed to visitor arrivals, the economic growth of the tourism industry, and provided positive media exposure for destination JAMAICA.

Tourism provides the vehicle through which increased economic development can be achieved with a strong internal supply chain.

The unit was required to increase dialogue and collaboration with the Tourism Linkages Network (TLN), a division of the Tourism Enhancement Fund (TEF), in order to help identify events which require sponsorship and developmental support, both of which helped to strengthen the linkages in the supply chain and assist with better alignment of events to the tourism product offering.

The following events, grouped according to the respective lifestyle passion points, were duly supported during the 2018/2019 year in review

ENTERTAINMENT & CULTURE

- The Jamaica Carnival, Kingston – April 22-30
- Tmrw Tday Culture Fest, Negril – May 1-6
- Mochafest – May 24-26
- Jamaica Ocho Rios International Jazz Festival, Ocho Rios & Kingston – May 31 - June 7
- Calabash Literary Festival, Treasure Beach, St. Elizabeth – June 1-3
- Charles Town Maroon Festival, Portland – June 20-24
- Miss Jamaica World Beauty with A Purpose Kingston – June 21 - December 31
- Reggae Sumfest, Montego Bay – July 15-22
- Jamaica Dream Weekend – August 2-6
- Merritone Homecoming & Family Reunion, Kingston & Montego Bay – October 8-16

HIGHLIGHTS

FROM THE MARKETPLACE



Caribbean Hotel & Tourism Association (CHTA) Caribbean Marketplace - January 2019

Jamaica's Minister of Tourism Hon. Edmund Bartlett and Director of Tourism Donovan White share a light moment with Matt Cooper, CMO, Caribbean Hotel & Tourism Association.



Caribbean Hotel & Tourism Association (CHTA) Caribbean Marketplace - January 2019

The Jamaica Tourist Board's Marcia Sinclair, District Sales Manager Northeast USA, was a featured presenter at the 16th New York Times Travel Show (NYTTS) in January.



Ziggy Marley Sirius XM - July 2018

The Jamaica Tourist Board partnered with the 2018 Rebellion Rises Summer Tour to give one lucky fan a free trip to Jamaica.



Join Me In Jamaica - May 2018

The JTB launched a video series featuring local celebrities from Jamaica sharing unique stories about their profession, homeland, and why Jamaica is a great place to visit.



Andiamo! - November 2018

Andiamo! Uptown featured Jamaica on Aspire and published the series online. A full-page ad ran in the Fall 2018 Uptown Magazine and Orbitz published a blog featuring Negril.



Reggae Sumfest NYC Launch - April 2018

DownSound Entertainment, promoters of Reggae Sumfest, hosted a media launch at the DL in New York City on April 17, 2018.



Jamaica Tourist Board Welcome Dinner for Actress CCH Pounder - May 2018

Star of NCIS, Avatar and several other movies, CC Pounder (left) is presented with an Everard Powell art piece by Jamaica's Director of Tourism, Donovan White during her visit.



Real Housewives of Orange County (RHOC) April 2018

The Real Housewives of Orange County filmed in Jamaica for its Season 13 cast trip as part of a JTB promotion. The RHOC cast filmed at Jewel Grande Montego Bay Resort & Spa and participated in various attractions on island.



South Beach Wine & Food Festival - February 2019

The Jamaica Tourist Board partnered with the Tourism Enhancement Fund to unleash the flavors of Jamaica at the 2019 Food Network & Cooking Channel's South Beach Wine & Food Festival.



JAMAICA[®]

ONE LOVE

ON THE HOMEFRONT cont'd.

- Jamaica Sound System Festival, St. Ann – October 22-24
- Portland Paradise Weekend, Portland – December 7-9
- Rastafari Rootzfest, Negril – December 14-16
- Jazz & Cabaret in the Gardens, Kingston – December 30
- Rebel Salute, St. Ann – January 18-19
- Misty Bliss, St. Andrew – March 3
- Earth Hour Concert, Kingston – March 19
- Jamaica Frenzy, Negril – March 26-31

CREATIVE ARTS

- Styleweek Jamaica, Kingston – May 16-24
- Caribbean Fashion Week, Kingston – June 11-15
- Montego Bay Fine Arts Festival, Montego Bay – July 21-22
- Liguanea Arts Festival, Kingston – April 10
- Misty Copeland Dance Event, Kingston – August 31 - September 1

SPORTS/ADVENTURE

- St. Ann Kite Festival, St. Ann – April 21
- Jakes Off Road Triathlon, St. Elizabeth – April 27
- RuJohn Celebrity Sports Camp, Kingston – June 17-23
- World Chess Championship Qualifier, Kingston – June 19-26
- Guardsman Games, Kingston – July 22
- ISKA Martial Arts Tournament, Montego Bay – September 10-15
- The Montego Bay International Marlin Tournament, Montego Bay – October 2-6
- Women With A Purpose 5k Run, SouthCoast – October 13
- The Port Antonio International Marlin Tournament, Portland – October 16-26

- NORCECA Beach Volleyball, Montego Bay – November 1-5
- Jamaica Backgammon Tournament, Ocho Rios – November 2-4
- Reggae Marathon, Negril – November 29 - December 2
- Jamaica Surfing Festival, St. Thomas – December 28-29
- Hanover Charities & Polo Tournament, Hanover – February 16-17
- Jamaica Fat Tyre Festival, St. Mary – February 18-24
- Kingston City Marathon, Kingston – March 15-17
- Venus Invitational Volleyball Tournament, St. Catherine – March 23-25
- Carifta Swimming Championships – March 15-18

FAITH BASED

- Fun in the Son, Kingston – July 14

GASTRONOMY

- PAN X, Islandwide (varied locations) – June 23 - November 1
- Boston Jerk Festival, Portland – July 1
- Little Ochie Seafood Carnival, St. Elizabeth – July 8
- SouthCoast Rum Festival, Clarendon – July 17
- Denbigh Agricultural Industrial & Food Show, Clarendon – July 31 - August 2
- Montego Bay Jerk Festival, Montego Bay – August 1
- Ocho Rios Seafood Festival, Ocho Rios – August 5
- Jamaica Food & Drink Festival, Kingston – October 20-28
- Restaurant Week, Islandwide – November 9-17
- Caribbean & SE Region Chapitre, Ocho Rios – November 8-11
- Jamaica Rum Festival, Kingston – March 9-10

The unit also successfully planned and executed the following 12 special projects during the year under review:

- JTB/JHTA's involvement at The Expo Jamaica – April 19-22
- The launch of the 'Join Me in Jamaica' digital campaign – May 12
- Jamaica's involvement at the Gothia Cup in Europe – July 15-21
- JTB's involvement in CPL Cricket Tournament – August 8-16
- JTB's involvement in The Caribbean Wedding Industry Awards, Conference & Expo – September 8-9
- JTB's involvement at JAPEX (Booth & Branding) – September 23-25
- JTB's involvement in The Jamaica Classic NCAA Basketball Tournament – November 16-18
- The Golden Tourism Day Awards – December 16
- CHTA Marketplace – JTB's booth & branding at event – January 24-31, 2019
- CHTA Marketplace: Tourism Opportunities/ China Workshop – February 1
- JTB's involvement at ITB Berlin Marketplace, Germany – March 6-10
- JTB's year-long involvement in varied Event Launches such as the Calabash Literary Festival, Reggae Sumfest, Jamaica Dream Weekend, Rebel Salute, and Reggae Marathon, among others

THE MARKETING COMMUNICATIONS UNIT

OVERVIEW

The Marketing Communications Unit is part of the marketing department, and is responsible for information dissemination, media relations, public relations, crisis communication, tourism awareness and any other communication related duties. The unit provides communication support to all departments of the organisation. Providing day-to-day supervision to the international public relations agencies, the unit coordinates opportunities for the destination brand to achieve high visibility in major markets; generates exposure for Jamaica through promotional activities; facilitates media trips; and coordinates messaging around the organisation's strategic pillars.

Public relations plans were developed to support the JTB's core markets (US/Canada/UK) and secondary markets of Continental Europe and Latin America. There was keen attention placed on reintroducing the destination to the markets of Japan and India. With a new Director of Tourism appointed in February 2018, the destination sought to centre itself, and began the process of transitioning from the 'Home of All Right' tag line.

VISITING JOURNALIST PROGRAMME

The Jamaica Tourist Board continued a vibrant visiting journalists' programme over the year. A total of 86 individual and group press trips were executed. Persons hosted included travel trade journalists, national consumer media, and influencers/bloggers. Radio remotes were an integral part of the toolkit. Additionally, the unit worked with major television stations and production companies on the filming of top-rated reality shows on the island.

THE MARKETING COMMUNICATIONS UNIT

VISITING JOURNALIST PROGRAMME cont'd.

The coverage of the destination by consumer and travel trade media has expanded the visibility of Jamaica as a top warm weather destination.

A concerted effort was made to harness the media value of special events.

- 2018 April – June: 35 press trips
- 2018 July – September: 18 press trips
- 2018 October – December: 21 press trips
- 2019 January – March: 12 press trips

Events marketing is an integral part of the marketing mix. In an effort to provide public relations support for major events in Jamaica, the Marketing Communications Unit hosted media trips to support sponsored events and invited several international journalists to participate. Journalists from the various regions participated in a total of nine press trips.

- The Jamaica Carnival 2018
- Jakes Triathlon
- Tomorrow, Today Fest

- Calabash
- Reggae Sumfest
- JAPEX
- Jamaica Food and Drink Festival
- Restaurant Week
- Reggae Marathon

In addition to traditional media trips, the unit hosted five multi-station radio remotes. The stations were selected from major cities across the US, Canada and the UK.

ACTIVATIONS FOR SPECIAL EVENTS (Jamaica)

Throughout the year, there are marquee events which require the collaboration of all agencies of the Ministry of Tourism, and for which the Marketing Communications Unit provides significant support. The support is delivered through event planning, communication plans and media coordination. The 2018/2019 events were:

JAPEX, 2018 September 23

The Jamaica Product Exchange (JAPEX), the annual tourism trade show, was held from September 23-25, 2018 at the Montego Bay Convention Centre in St. James, with an impressive group of buyers and sellers networking to advance the industry.

Name of Radio Remote	Remote Date	# of Participating Radio Stations	Audience Reach (AR)/ Listener's Reach (LR)
WKFT	June 3 - 9, 2018	2	62,418 (AR)
UK & Ireland Multi-Station	July 13 - 24, 2018	5	851,000 (AR)
JAWW/Hyatt Ziva Rosehall	September 8 - 12, 2018	11	4,591,000 (LR)
JAWW/Sandals Negril	October 1 - 5, 2018	20	10,055,900 (LR)
JAWW/Sandals Whitehouse	January 24 - 29, 2019	23	11,981,000 (LR)
Total Reach			27,541,318

Hosted by the Jamaica Hotel and Tourist Association (JHTA), in collaboration with the Jamaica Tourist Board (JTB), the three-day event showcased JHTA members, including hotels and attractions, meeting with overseas hospitality and tourism industry wholesalers and travel agents to promote their businesses and negotiate and confirm rates for winter 2018 and beyond.

Tourism Awareness Week, 2018 September 23-29

The tourism sector, led by the Ministry of Tourism and its agencies, collectively observed and celebrated World Tourism Day with a week of activities (Tourism Awareness Week 2018) from September 23-29 under the theme “Tourism and The Digital Transformation”. The theme was seen as a catalyst to highlight the new digital modifications that industry stakeholders have used to enhance the business environment. It was also in line with sustainability goals for the global tourist industry as it fostered more opportunities to create and grow businesses.

Golden Tourism Day Awards, 2018 December 16

This was the first staging of the captioned event, as the Ministry of Tourism established the awards ceremony to highlight and recognise industry practitioners who have served in the industry for 50 or more years. JTB was the organising agency with responsibility for planning and hosting the event through a select committee. The staging of the event has been marked for the Sunday closest to December 15 every year. **The event was hosted at the Montego Bay Convention Centre with a total of 56 recipients honoured.**

CHTA Travel Marketplace, 2019 January 29

Jamaica won the bid to host the 37th staging of the Caribbean Travel Marketplace. The event was held at the Montego Bay Convention Centre from January 29-31, 2019 in collaboration with the Ministry of

Tourism, the Jamaica Hotel & Tourist Association, and on behalf of the Caribbean Hotel and Tourist Association. Billed as the premier business-to-business tourism trade show for the Caribbean, the objective of the CHTA Travel Marketplace was to bring together hotel and destination representatives; wholesalers and tour operators; online travel agencies; MICE planners; and members of the media for several days of business meetings. It afforded the destination an opportunity to showcase the product in the best light possible and allowed some of the smaller tourism entities to interact with large tour operators on a level playing field. **There were over 1,000 conference delegates in attendance at the event.**

NEWS BUREAU ACTIVITIES

A total of 62 press releases, pitches and articles were distributed through our representative agencies in North America, Latin America, and UK/Europe.

- **2018 April – June:**
10 releases/pitches/photo captions
- **2018 July – September:**
16 releases/pitches/photo captions
- **2018 October – December:**
18 releases/pitches/photo captions
- **2019 January – March:**
18 releases/pitches/photo captions

MESSAGING

The Marketing Communications Unit provided fact checking services to all major travel guides. Presentations, speeches, messages and editorial content were also crafted for executives of JTB to deliver at a total of 31 events:

Messages/Speeches

- April – June (9)
- July – September (6)
- October – December (6)
- January – March (10)

THE MARKETING COMMUNICATIONS UNIT

MESSAGING cont'd.

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

SPECIAL PROJECTS

The Unit hosted special projects that helped to propel its strategic goals for the period. These projects spanned the range of digital, events, reality TV, magazines, radio, and traditional TV. The opportunities allowed for the destination to be featured in unique ways to a larger audience that otherwise would not be tapped. They allowed the destination to command continued prominence in the global marketplace.

The projects outlined below represent three of the projects that garnered significant exposure for the destination.

- **Reggae Girlz 2018**

The Reggae Girlz made history by becoming the first Caribbean nation to qualify for a senior FIFA Women's World Cup after finishing third at the 2018 CONCACAF Women's Championship. The momentum behind their achievement was shared worldwide, as Jamaicans all over the world rallied to show their support for the Reggae Girlz. JTB shared in support through a PR strategy which included media activations, press releases and press trips that enabled us to highlight their achievements, and create awareness of the destination.

- **Join Me in Jamaica 2018**

The Join Me In Jamaica digital campaign ran from July 19 – August 17. The aim was to ask local celebrities to share what they loved most about Jamaica, after which they extended the invitation for the audience to join them. Consumers were invited to enter to win a trip to Jamaica to experience a specially curated Join Me in Jamaica vacation. The sweepstakes was hosted on the microsite www.joinmeinjamaica.com. A total of 47,709 entries were received, with a total of 4,254,762 impressions for Facebook, Instagram and Twitter at a 28.94% conversion rate.

- **The Real Housewives of Orange County (RHOC) 2018**

RHOC is an American reality television series that premiered March 21, 2006 on Bravo. It has significant audience reach, focusing on the personal and professional lives of several women residing in Orange County, California. Through collaborative efforts with the producers of the show, season 13, episode 13 was filmed in Jamaica, and had a recorded viewership of over 2.2 million. Several prominent on island attractions were featured, emphasising the expansive array of Jamaica's product offering.

THE TOURISM AWARENESS UNIT

The Tourism Awareness Unit continued to work with the school community to encourage an understanding and appreciation for the tourist industry vis-a-vis national development. A strong education programme was established through the Tourism Action Clubs (TAC) in secondary and tertiary schools across the island. Primary school students were engaged through various competitions.

The planned programmes and activities for the unit focused on the following areas:

- **Tourism awareness presentations, exhibitions, career talks, seminars and other activities**

The Unit delivered a total of 48 presentations to 3,997 individuals from the primary to the tertiary level. JTB was invited to 18 career talks and seminars over the period, enlightening a total of over 1,721 students and teachers, and sharing the various career options available in tourism. The Unit participated in two exhibitions, showcasing tourism to over 231 locals.

- **Provision of supervision and support for Tourism Action Clubs, including through the various social media channels – Facebook, Instagram, Youtube, WhatsApp and a TAC Website**

The Unit visited 29 Tourism Action Clubs during the year under review, with an audience of over 1,900 students and teachers. There were 21 inductions totalling 913 inductees. The Unit also hosted its annual TAC Forum at the Montego Bay Convention Centre surrounding the theme for World Tourism Day, “Sustainable Tourism – A Tool for Development”, with an audience of over 131 students and teachers.

- **Facilitation of student participation in competitions**

The Unit coordinated and hosted approximately nine competitions throughout the year, through established partnerships with the Global Travel and Tourism Partnership (GTTP), Florida Caribbean Cruise and Association (FCCA) as well as the Caribbean Tourism Organisation (CTO).

- **Provision of information**

The Unit managed information requests from the tacjamaica.com and the visitjamaica.com mailbox. The Unit also assisted local clients with information on the tourism product, events and activities, and the industry as a whole. Over 1,080 emails were handled, 2,001 telephone calls received and over 2,385 office visits were facilitated for the period.

THE CLIVE TAFTE INFORMATION AND RESOURCES CENTRE (LIBRARY)

The Clive Taffe Information and Resources Centre (Library) continued to fulfil its mission for management of access to relevant, current and accurate information sources, providing research and information services to the different units of the organisation in addition to academia, researchers and visitors.

The physical collection stood at over 7,000 items, while access to the electronic collections including Ebsco Host’s Hospitality and Tourism Complete, United Nations World Tourism Organisation’s (UNWTO) E-library, ProQuest’s Ebook Central, 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’s Central Intelligence Agency (CIA).

This unit also had responsibility for:

- Image management - Over the period 873 images were distributed to partners, researchers and the public through the in-house image bank.
- Record and information management - A Record and Information Management Committee (RIMC), was established to guide the policies and procedures for the establishment of a registry for the Jamaica Tourist Board. The Information and Resources Centre is leading this process.
- Recovery and conversion - Adjusting physical and electronic sources to more accessible formats.

JAMAICA®

ONE LOVE

RESEARCH & MARKET INTELLIGENCE

The Research and Market Intelligence (RMI) Unit is tasked with conducting research and providing statistical data to inform and facilitate the strategic management process of the Jamaica Tourist Board (JTB). These activities include the development of methodologies and deployment of instruments to measure relevant variables within the tourist industry (according to international standards). 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.

Jamaica recorded total arrivals of 4.3 million persons for the year 2018, from which it earned US\$3.3 billion. Just over 50,113 persons were employed directly by the accommodation sector of the industry to host our visitors, 66% of whom were from the United States.

Please see Appendix I for a summarised report of the statistical data for the period under review.

MANAGEMENT INFORMATION SYSTEMS

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

- To deploy and maintain applications and tools to facilitate the timely distribution of critical information used for decision making within the organisation and by extension the tourism industry
- To initiate technological innovations that will allow the JTB to significantly improve its 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 JTB
- To provide support for IT infrastructure, applications, and related business processes



Jamaica Dream Weekend - Cool Runnings Water Park, Negril, Westmoreland
Photo Credit: Jamaica Tourist Board

During the year under review, the following activities were undertaken:

- Implement the Mimecast Secure Email gateway platform to protect JTB's emails from spam, malware, zero-day attacks and other advance threats
- Upgrade the HR System from HRM 2001 to ABCi Global
 - Convert existing data from old system into ABCi Global
 - Upload leave balances, create and assign leave plans
 - Setup payrolls and assign employees
- Update deductions
 - Install Biometric time clocks and register ALL local staff members.
 - Inventory management
 - Employee self-serve
- Security infrastructure upgrade
 - Upgraded the network security gateway devices and firmware
 - Reestablish site to site virtual private network

– Deployment of new gateway policies and rules

- Completed the upgrade of the PBX infrastructure to a Cisco-based Unified Communications Systems (UCS) platform for the local office

General Administration

- Maintain and monitor (the security of the network) on an ongoing basis to ensure the integrity of the system and data
- Manage the technical issues of all staff (local and overseas) by managing and maintaining an efficient help desk
- Manage and support the data entry operations; ensure proper backups and liaise with partners to resolve technical issues
- Manage, maintain and liaise with the vendors of our Content Management System (CMS), Customer Relationship Management System (CRM) and other websites

REGIONAL OFFICE

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

- Travel agent familiarisation trips
- Visitor relations
- Press trips
(in support of the marketing department)
- Radio remotes
- Meet the People programme
- MICE programme
- Special events and promotions
- Meetings with industry partners e.g. hotels, attractions, Sangster International Airport (MBJ), immigration, customs, destination management companies (DMCs)
- Industry liaison (e.g. with Jamaica Hotel & Tourist Association (JHTA), Tourism Product Development Company Limited (TPDCo), Quality Assurance Committee, Linkages Council, and Destination Assurance Council)
- Community liaison (e.g. with chambers of commerce, service clubs, key stakeholders police, embassies, funeral homes, hospitals, local schools' career day activities)
- Information and facilitation services at the island's international airports (mainly MBJ)
- Training workshops and seminars targeting Passport Immigration and Citizenship Agency (PICA), Jamaica Constabulary Force (JCF) and managers of hotels
- Outreach Activities (local schools and an NGO)
- External stakeholder meetings for policy discussions (Ministry of Health & Wellness, JCF and MBJ)

2018/2019 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's product offerings. There were a few additions/improvements to the product offerings which resulted in an increase in rooms, thus enhancing the island's marketability.

2018/2019 Travel Agent/Tour Operator Arrivals

United States – 340	Canada – 113
United Kingdom – 115	Europe – 169
Latin America – 148	

Familiarisation Trips

2018/2019 saw continued efforts from the sales department to increase visitor arrivals within target markets. As part of the Board's strategy for deeper penetration in international markets, four Senior Business Development Officers (SBDOs) were assigned to the US, Canada, Europe, Latin America and the Caribbean. These assignments included participation in the winter sales blitz, consumer road shows, and travel and consumer shows. The objective was for the team to participate in the core functions of the marketplace destination, to gain deeper insights into their assigned regions and activities, and have meaningful interactions with the travel agents.

In this regard:

- SBDO Afiya Henry, assigned to the UK & European markets, travelled to Germany in January 2019 to support the Jamaica Road Show, a sales initiative planned by the German office. The team hosted sales events in five cities: three of which were in Germany - Dusseldorf, Frankfurt & Munich, Zurich (Switzerland) and Prague (Czech Republic) between January 7-11, 2019.
- SBDO Marsha Roberts is appointed to the US market. Both the Regional Director for Jamaica, Odette Soberam-Dyer, and Miss Roberts



travelled to Miami and Philadelphia respectively in February 2019 to participate in hosting the North American Winter Sales Blitz led by the Miami office.

- SBDO Jerron Britton, assigned to the Canadian market, travelled to Ottawa, Toronto and Calgary respectively in March 2019. He participated with the Canada office in conducting presentations and participating in consumer shows including the Travel and Vacation Show, and Travel Brands Product Launch. Agency sales and service visits were also conducted.

Efforts have also been made to expand the JTB's relationship with local industry partners through the hosting of a series of Stakeholder Engagement Meetings.

Special Efforts were made to revamp JHTA chapters in the resort areas of Portland and the South Coast.

The team continues to support initiatives developed through in-market outreach and collaboration with partners on island to offer the necessary assistance required.

Caribbean Market

The decision was taken to redirect this portfolio to the corporate office in Kingston, with the appointment of a Caribbean Sales Manager; the regional office will continue to offer support through assigning one of its SBDOs.

Visitor Relations

The Visitor Relations Unit continued to provide:

- Wide ranging assistance and support to visitors to the island
- Management of all complaints from visitors against hotels/other accommodations/transportation providers/attractions
- Preparation of all customs documents to assist with the clearance of items brought to the island by persons hosting events
- Preparation of the requisite letter to Customs for in-bond operations to facilitate the annual renewal of licenses
- Airport (MBJ) activities:
 - Provide information to visitors who approach the desk for assistance
 - Assistance with hotel reservations and other accommodation needs
 - Assist with the monitoring of the immigration line to expedite movement
 - Escort and assist groups/individuals to Customs and ensure clearance of equipment
 - Liaise with Customs on re-exportation of equipment in-bond
 - Execute VIP meet and greet to arriving guests and VIP cardholders

The total numbers of meet and greet activities and waiver applications processed for fiscal year 2018/2019 were:

- VIP card holders – 269
- Travel specialists – 508
- Media/travel agents/others: 3891
- Large groups – Weddings/conventions/meeting planners etc. – 1786
- Destination weddings – 315
- Hotel reservations – 62 reservations made for 126 visitors
- Customs clearance applications (waiver letters) – 179

Inaugural Flights

Seven inaugural flights were handled during the period:

- July 18, 2018 – Eurowings from Germany
- October 26, 2018 – Norwind Airlines, Pegas Fly from Russia
- November 17, 2018 – Frontier from Raleigh, North Carolina
- December 16, 2018 – Swoop from Hamilton, Canada
- December 20, 2018 – Spirit Airlines, Detroit, Michigan
- February 10, 2019 – Frontier from Philadelphia
- February 28, 2019 – Spirit from Orlando

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

Despite the challenges present during the fiscal year 2018/2019, 30 persons were accommodated by MTP volunteers at their homes, places of business, restaurants, hotels, educational, and health institutions among others. There was also the arrangement of a 'voluntourism' experience at one of our local homes.

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

AWARDS & RECOGNITION



Devon House Mansion, Kingston
Photo Credit: Jamaica Tourist Board

AWARDS & RECOGNITION

The Jamaica Tourist Board and Jamaica continued to reap accolades and worldwide recognition during the 2018/2019 year under review, as can be seen below:



HSMAI AWARDS

Influencer Marketing (Gold)
Media Placement (Bronze)

The Hospitality Sales and Marketing Association International (HSMAI) is committed to growing business for hotels and their partners, and is the industry's leading advocate for intelligent, sustainable hotel revenue growth. The association provides hotel professionals & their partners with tools, insights, and expertise to fuel sales, inspire marketing, and optimise revenue through programs such as HSMAI ROCET, Adrian Awards, and Revenue Optimisation Conference.



PATWA INTERNATIONAL HALL OF FAME AWARDS

Worldwide Tourism Minister of the Year Award
Best Destination for Adventure Tourism

PATWA is the world's largest travel writers' organisation representing members from 70 countries around the world. PATWA's purpose is to promote professional development of Travel Writing and Travel Communications, which will make invaluable contributions in the promotion of tourism. The PATWA Award recognises and rewards entrepreneurs and individuals who make an invaluable contribution in the Travel & Tourism Industry.



WORLD TRAVEL AWARDS

- Leading Caribbean Destination (Jamaica)
- Leading Caribbean Cruise Destination (Jamaica)
- Caribbean's Leading Tourist Board (Jamaica Tourist Board)
- Caribbean's Leading Cruise Port (Ocho Rios)
- Caribbean's Leading Home Port (Montego Bay)
- World's Leading Beach Destination (Jamaica)
- World's Leading Cruise Destination (Jamaica)
- World's Leading Luxury Hotel Villa (Ian Fleming Villa at GoldenEye, Jamaica)
- World's Leading Villa Resort (Round Hill Hotel & Villas)
- World's Leading All-Inclusive Company (Sandals Resorts International)
- World's Leading All-Inclusive Family Resort Brand (Beaches Resorts)
- World's Leading Caribbean Attraction Company (Island Routes Caribbean Adventures)
- World's Leading Adventure Tour Operator (Chukka Caribbean Adventures)

World Travel Awards celebrated its 25th anniversary in 2018 and is acknowledged across the globe as the ultimate travel accolade. Attended by senior executives from major travel companies, operators, and destinations, World Travel Awards events are universally respected as providing established, top level networking opportunities regionally and globally. The brand aims to celebrate those organisations who push the boundaries of industry excellence.



2018 TRAVVY AWARDS

Best Tourism Board Overall

The Travvy Awards acknowledge and celebrate the best in the industry by honouring travel companies, travel products, travel agencies, and destinations for their outstanding achievement. This year, over 100,000 votes—the largest voting block of agents in history—were cast to determine the 2018 Travvy Awards winners. These winners were then honoured during an awards dinner and presentation attended by the finalists, industry leaders and travel professionals from around the world.

OTHER AWARDS



2018 BAXTER MEDIA AGENTS' CHOICE 2018

Best Caribbean Destination

The Baxter Media Agents' Choice 2018 Awards marks a milestone year for Canadian Travel Press as it celebrates 50 years of excellence in news and editorial coverage for Canada's travel industry. The winners were honoured at the Agents' Choice Awards Gala that brought together the entire Canadian industry sponsored by Air Canada, Sandals and WestJet.



2018 WORLD OF CRUISING WAVE AWARDS

Favourite Destination

The Wave Awards celebrate the very best of the UK's cruise industry. Launched in 2015 and now in their fourth year, these awards are firmly established as the premier accolades in the industry. Hailed as the Oscars of cruising, they recognise and reward excellence and innovation in a business that is continuously evolving to deliver an exceptional experience, both on board and ashore.



2018 TRAVELAGE WEST WAVE AWARDS

International Tourism Board Providing the Best Travel Agent Support

The TravelAge West Wave Awards celebrates individuals of the travel industry and recognises their lifelong commitment to the betterment of the industry. This evening brings together honorees and travel agents to honour and recognise outstanding qualities and services of the industry's leading travel suppliers.



2018 WORLD SPA AWARDS

Caribbean's Best Spa Destination (Jamaica)
 Caribbean's Best Hotel Spa (The Ocean Spa at Jamaica Inn)
 Jamaica's Best Hotel Spa (The Ocean Spa at Jamaica Inn)
 Jamaica's Best Resort Spa (FieldSpa at GoldenEye)
 Jamaica's Best Wellness Retreat (Jewel Grande Montego Bay Resort & Spa)

World Spa Awards was developed in reaction to overwhelming demand from the spa industry for a programme that was fair and transparent; a programme with a mission to serve as the definitive benchmark of excellence, and to help to foster a new era of growth in spa tourism.



NASHVILLE AMERICAN ADVERTISING AWARDS – JOIN ME IN JAMAICA DIGITAL CAMPAIGN

Silver Addy - Online/Interactive Campaign
 Silver Addy - Webisode Series
 Silver Addy - Online/Interactive Campaign – Join Me In Jamaica Sweepstakes

The American Advertising Awards is one of the industry's largest creative competitions, attracting nearly 35,000 professional and student entries each year through local club competitions. The mission of the American Advertising Awards is to recognise and reward the spirit of creative excellence in advertising.



TRIPADVISOR TRAVELERS' CHOICE AWARDS 2019

#1 Caribbean Destination
 #14 Best Destination in the World

Trip Advisor's Travellers' Choice Award winners are determined based on the quantity and quality of reviews and ratings for hotels, attractions and restaurants in destinations worldwide gathered over a 12-month period, as well as traveller booking interest on TripAdvisor. In the 10th year of the awards, TripAdvisor has recognised 402 destinations around the world.

JAMAICA[®]

ONE LOVE



Green Grotto Caves, Montego Bay, St. James
Photo Credit: Jamaica Tourist Board

PRODUCT/ LICENSING



Montego Bay
Photo Credit: Jamaica Tourist Board

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 2018/2019, licences were approved for 6,416 entities as set out in this table:

2018/19 ENTITIES LICENSED	RENEWAL	NEW	TOTAL
ATTRACTION	24	4	28
BIKE	0	0	0
CAR RENTAL	45	1	46
CONTRACT CARRIAGE	4,180	344	4,524
DOMESTIC TOUR	122	22	144
DOMESTIC TOUR CONTRACT CARRIAGE	636	18	654
WATERSPORTS	81	9	90
HOTELS	0	10	10
NON HOTEL	0	7	7
HOMESTAY	1	1	2
TRAVEL HALT	0	1	1
PLACE OF INTEREST	0	0	0
CRAFT	887	23	910
*TOTAL	5,976	440	6,416

*Of the total new entities, 5 had name changes - 2 hotels and 3 domestic tours



INTERNATIONAL

The year 2018 continued to record a strong growth trend in international travel worldwide. It followed a consolidation of the strong results of 2017 (+7%) and was well above the sustained and consistent trend of 4% or higher growth since 2010. The UN World Tourism Organisation (UNWTO) reported that international tourist arrivals grew by 5.6% in 2018 compared to the same period in 2017, reaching a high of 1,403 million.

As a result, over 451 million more international tourists travelled the world in 2018 as compared to the 952 million international tourists in 2010.

All world regions recorded growth in international tourist arrivals for 2018. The strongest growths were registered in Africa, Asia and the Pacific, and Europe, with 7.0%, 6.5% and 6.1% respectively. A somewhat lower rate of growth was recorded for the Middle East, with 3.8%, and the region with the lowest rate of growth, the Americas, with 3.1%. Europe, the most visited region with over half the world's international tourists, saw an increase of 40.9 million arrivals in 2018, reaching a total of 713.4 million.

The second most visited region in the world, Asia and the Pacific, increased by 21.1 million more arrivals to a total of 345.1 million. The Americas, of which Jamaica is a part, with a growth of 3.1%, welcomed an additional 6.5 million international tourists, raising the total to 217.3 million. Growth was driven by North America posting a growth of 4.9%, with 143.9 million arrivals.

CARIBBEAN

The Caribbean Tourism Organisation (CTO) reported that in 2018 there were mixed results in demand for travel to the region and an estimated 29.9 million visitors came to enjoy the unequalled and diverse experiences the Caribbean had to offer. This was approximately 700,000 less tourist arrivals, a 2.3% decrease over the 30.6 million in 2017.

The Caribbean region continues to demonstrate that its diversity of cultures and authentic natural experiences offer numerous enjoyable, refreshing and relaxing encounters.

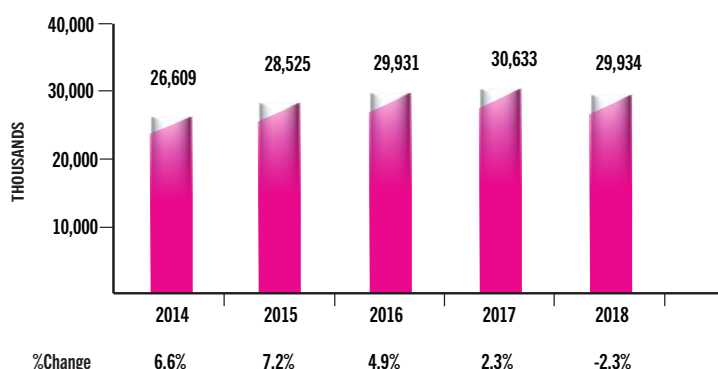
Although some of the northeastern island destinations, particularly Puerto Rico, St. Maarten, and the Virgin Islands, struggled with the effects of a very active hurricane season, the Dominican Republic, Cuba, Jamaica and the Bahamas showed continued growth from their main source markets in the Americas and Europe. The United States remained the most important supplier of tourists to the region, even with a decrease of 6.3% in arrivals. Over 13.9 million Americans visited the region, with most arriving in the Dominican Republic, Jamaica, and The Bahamas. Arrivals from Canada increased by 5.7%, and European arrivals showed a modest increased growth of 1.3%, while intra-regional travel showed a strong 5.3% increase.

The Caribbean cruise sector is estimated to have increased by 6.7% in passenger arrivals during 2018 to over 28.9 million. Eighteen of the twenty-four destinations recorded increased cruise activity

Trident Castle, Portland
Photo Credit: Jamaica Tourist Board

in 2018 over 2017. The Bahamas Islands, Cozumel, Cayman Islands, Jamaica and Puerto Rico, are the top five most popular Caribbean cruise ship destinations within the region, which is 50.5% of the market and represents 13.7 million passengers.

CARIBBEAN TOURIST ARRIVALS



JAMAICA

VISITOR ARRIVALS

Total visitor arrivals for the year 2018 reached another record of 4,318,600, which was 1.0% above the 4,276,189 arrivals recorded in 2017. This figure represents 42,422 more arrivals than in 2017.

Stopover arrivals of 2,472,727 increased by 5.1%. Foreign national arrivals of 2,298,162 increased by 4.6%. Non-resident Jamaican arrivals of 174,565 increased by 11.5%. Cruise passenger arrivals of 1,845,873 decreased by 4.0%.

CRUISE PASSENGER ARRIVALS - 2017 & 2018

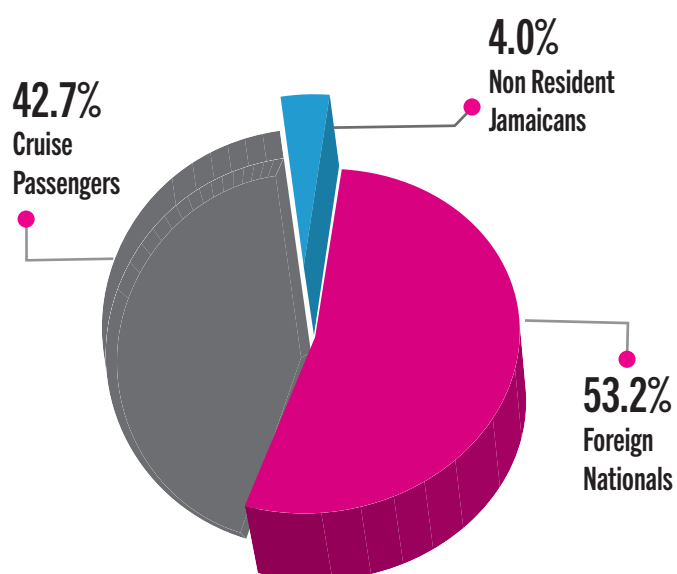
DESTINATION	2017	2018	%CHANGE
Bahamas	4,626.3	4,877.6	5.4%
Cozumel (Mexico)	4,103.8	4,265.5	3.9%
Cayman Islands	1,728.4	1,921.1	11.1%
Jamaica	1,923.3	1,845.9	-4.0%
Puerto Rico	1,229.1	1,658.8	35%
St. Maarten	1,237.8	1,597.1	29%
US Virgin Islands	1,317.2	1,430.7	8.6%
Belize	1,014.2	1,208.1	19.1%
St. Kitts & Nevis	1,062.5	1,142.1	7.5%
Turks & Caicos Islands	827.4	1,021.7	23.5%
Dominican Republic	1,108.0	982.3	-11.3%
Haiti	795.4	885.2	11.3%
Aruba	792.4	815.2	2.9%
Antigua	792.9	792.9	0%
St. Lucia	668.0	760.3	13.8%
Curacao	634.4	757.3	19.4%
Barbados	681.2	675.8	-0.8%
Bermuda	418.0	484.3	15.9%
Martinique	405.6	392.6	-3.2%
Grenada	299.4	342.8	14.5%

Source: CTO data supplied by member countries

JAMAICA

VISITOR ARRIVALS cont'd.

VISITOR ARRIVALS TO JAMAICA 2018



STOPOVERS

Total stopover arrivals for the year 2018 reached another record of 2,472,727, which was 119,812 more stopovers, or 5.1% higher than the 2,352,915 arrivals recorded in 2017.

In the first quarter of 2018, Jamaica recorded a 6.6% growth in stopover arrivals over 2017 figures. During the second quarter, this growth slipped to 4.4% and in the third quarter, growth moved down to 3.5%. In the last and final quarter of 2018, growth fell again to 4.0%.

Average Length of Stay

In 2018, the overall average intended length of stay for foreign nationals was 8.1 nights; which was less than the 8.4 nights in 2017. This is two less nights spent in Jamaica than those visitors who stayed on the island during the early 1990s, when the

intended length of stay was over 11 nights. Visitors who used hotel accommodation had an average length of stay of 6.2 nights, and those who used non-hotel accommodation stayed 8.7 nights.

American visitors, on the average, stayed 6.8 nights while Canadians stayed an average of 8.6 nights. Visitors from the United Kingdom recorded an average length of stay of 14.4 nights and visitors from Continental Europe stayed 11.2 nights.

Purpose of Visit

Of the 2,472,727 stopover arrivals who visited the island during 2018, a total of 1,867,662 or 75.5% arrived for the purpose of leisure, recreation and holiday; 15.6% were visiting friends and relatives, 3.7% were on business, and the remaining 5.2% were on other or unstated purposes.

HOTEL ROOM OCCUPANCY

The average available room capacity rose by 4.7% in 2018, moving from 22,553 rooms in 2017 to 23,615 rooms in 2018. Total room nights sold of 5,767,196 in 2018 were up 7.9% above the 5,344,335 room nights sold in 2017. Hotel room occupancy increased by 2.0 percentage points to 66.9%, compared to the 64.9% level in 2017. The number of stopovers that intended to stay in hotel accommodations increased from 1,652,237 in 2017 to 1,721,682, an increase of approximately 4.2% in 2018.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 68.7%, compared to 68.3% recorded in 2017. The total number of room nights sold increased by 4.1%, moving from 2,233,331 in 2017 to 2,326,005 in 2018. The average room capacity increased by 3.5% in 2018, moving from 8,961 rooms in 2017 to 9,277 rooms in 2018. The number of stopovers that intended to stay in Montego Bay at hotel accommodations increased from 716,497 in 2017 to 748,671, an increase of 4.5% in 2018.

The average hotel room occupancy rate for Ocho Rios was 70.0% which was 2.7 percentage points higher than the 67.3% recorded in 2017. The total number of hotel room nights sold moved from 1,474,617 in 2017 to 1,601,371 in 2018, an increase of 8.6%. The number of stopovers that intended to stay in Ocho Rios at hotel accommodations recorded an increase of 2.0%, moving from 451,492 in 2017 to 460,470 in 2018.

The resort area of Negril recorded an average hotel room occupancy rate of 65.5% in comparison to the rate of 62.2% in 2017. The number of hotel room nights sold in this resort area grew by 17.1%, recording 1,425,188 room nights sold, compared to 1,217,383 sold in 2017. The average room capacity increased by 11.3% in 2018, moving from 5,360 rooms in 2017 to 5,965 rooms in 2018. The number of stopovers that intended to stay in Negril at hotel accommodations increased from 386,055 in 2017 to 410,665, which was an increase of 6.4% in 2018.

In the Mandeville/South Coast resort area, the average hotel room occupancy rate increased by 5.5 percentage points, moving from 51.4% in 2017 to 54.3% in 2018. The average room capacity decreased by 3.0% in 2018, moving from 7,044 rooms in 2017 to 6832 rooms in 2018. Room nights sold rose from 132,200 in 2017 to 135,338 in 2018.

Kingston & St. Andrew achieved a hotel room occupancy level of 59.4%, compared to 56.9% recorded in 2017. The number of room nights sold in Kingston & St. Andrew decreased by 3.2%, moving from 277,749 in 2017 to 268,750 in 2018.

Hotel room occupancy for the resort area of Port Antonio was 16.2%, the number of room nights sold in Port Antonio rose from 9,055 in 2017 to 10,546 in 2018, and the average room capacity moved from 184 rooms in 2017 to 178 rooms in 2018.

Overall, the all-inclusive hotel room occupancy rate increased to 74.3% which was 3.2 percentage points higher than the level of 71.1%, as recorded in 2017. The non all-inclusive room occupancy rate moved down from 37.7% in 2016 to 37.4% in 2018.

The hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms recorded a rate of 30.4%. Hotels with 51 – 100 rooms achieved a rate of 40.8%. The number of stopovers that intended to stay in hotels with less than 100 rooms increased from 138,115 in 2017 to 138,404, an increase of 0.2% in 2018. Hotels in the size range of 101 – 200 rooms recorded an occupancy rate of 57.5%, and hotels with over 200 rooms achieved a room occupancy rate of 76.5%. The number of stopover arrivals that intended to stay in hotels with more than 100 rooms was 1,583,278 which was higher than the 1,514,122 stopovers in 2017.

VISITOR EXPENDITURE

Gross visitor expenditure in 2018 was estimated at approximately US\$3.305 billion. This represents an increase of 9.8% against the estimated US\$3,010 billion earned in 2017.

Total expenditure of foreign nationals amounted to US\$3,027 billion. Cruise passenger expenditure totalled US\$0.184 billion while US\$0.094 billion was estimated as the contribution of non-resident Jamaicans.

Foreign nationals spent on the average US\$162.12 per person per night, while cruise passengers spent an average of US\$100.47 per person per night.

DIRECT EMPLOYMENT IN THE ACCOMMODATION SECTOR

The number of persons employed directly in the accommodation sub-sector moved from 48,439 in 2017 to 50,416 in 2018, an increase of 4.1%.

JAMAICA

DIRECT EMPLOYMENT IN THE ACCOMMODATION SECTOR cont'd.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 45,289 persons or 89.8% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 22,081 direct jobs represented 43.8% of those employed, Negril with 12,027 direct jobs, accounted for 23.9%, and Ocho Rios with 11,181 direct jobs was responsible for 22.2%. Kingston, Port Antonio and the South Coast accounted for the remaining 10.2% of employment in the accommodation sector.

The average number of employees per room in 2018 was estimated at 1.54.

NEW DEVELOPMENTS 2019

Airlift

- Delta Airlines began new operations out of New York (JFK) into Norman Manley International Airport.
- Frontier Airlines began new services out of Philadelphia Pennsylvania (PHL) and Raleigh North Carolina (RDU), into Sangster International Airport.
- Spirit Airlines began new services from Orlando Florida (MCO) into both Jamaican international airports; and from Detroit (DET) into Sangster International Airport.
- Southwest Airlines began a new service out of St. Louis, Missouri (STL) into Sangster International Airport.
- New chartered services were offered from Sun Country Airline from Dallas Ft. Worth Texas (DFW) and Thomas Cook out of Manchester England (MAN).

Accommodations

- **The R Hotel**, Kingston's first extended stay/apartment hotel opened with 58 rooms.
- **"S" Hotel**, the former Breezes Montego Bay, after extensive refurbishing, opened with 124 rooms in January 2019.
- **AC Hotel Kingston by Marriott**, with 220 rooms, completed construction and opened in June 2019.
- **The Half Moon resort** has rebranded its villas as the **Rose Hall Villas**, and began construction of 57 additional new rooms scheduled for completion in November 2019.
- **Ocean Coral Spring by H10 Hotels Trelawny, Silver Sands** began construction on the first phase of an exclusive Caribbean resort, with 500 rooms expected to be completed by December 2019.
- The former **Oceana Hotel** is expected to undergo refurbishing and will form part of the Hilton Tapestry brand to be named the **ROK Hotel**. This 12-storey hotel, will operate 168 rooms on the downtown Kingston waterfront.

APPENDIX 1

See Tables taken from the **Jamaica Tourist Board's Annual Travel Statistics** for 2018 on the following pages.



JAMAICA[®]

ONE LOVE

APPENDIX 1

TABLES & FIGURES

Old Spanish Bridge, White River, St. Mary
Photo Credit: Jamaica Tourist Board

APPENDIX 1

TABLE 1
VISITOR ARRIVALS TO
JAMAICA 2004 - 2018

	STOPOVERS	CRUISE PASSENGERS ¹
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
2017	2,352,915	1,923,274
2018	2,472,727	1,845,873

¹ Includes armed forces on naval vessels

FIGURE 1
VISITOR ARRIVALS TO JAMAICA 2004 - 2018



TABLE 1A
SUMMARY OF MAIN INDICATORS

	2017	2018	% Change 2018/17
TOTAL VISITORS: STOPOVER & CRUISE ARRIVALS	4,276,189	4,318,600	1.0
1. TOTAL STOPOVERS	2,352,915	2,472,727	5.1
Foreign nationals	2,196,301	2,298,162	4.6
Non-Resident Jamaicans	156,614	174,565	11.5
MARKET REGION	2,352,915	2,472,727	5.1
From U.S.A.	1,509,963	1,628,402	7.8
Canada	405,174	399,969	-1.3
Europe	325,804	328,369	0.8
Caribbean	63,944	67,495	5.6
Latin America	32,224	33,922	5.3
Asia & Pacific	9,292	7,977	-14.2
Other Countries	6,514	6,593	1.2
2. CRUISE SHIP PASSENGERS	1,923,274	1,845,873	-4.0
4. TOURIST ACCOMMODATION	31,851	32,797	3.0
Hotel Rooms*	24,142	25,091	3.9
All-Inclusive	18,738	19,933	6.4
Non All-Inclusive	5,404	5,158	-4.6
Other Rooms	7,709	7,706	0.0
Guesthouses	3,829	3,726	-2.7
Resort Villas & Cottages	3,162	3,162	0.0
Apartments	718	818	13.9
Hotel Room Nights Sold	5,344,335	5,767,196	7.9
Average Hotel Room Nights Available	8,231,845	8,619,475	4.7
Average Hotel Room Occupancy	64.9	66.9	3.1
All-Inclusive Hotels	71.1	74.3	4.5
Non All-Inclusive	37.7	37.4	-0.8
5. AVERAGE LENGTH OF STAY			
Foreign Nationals	8.4	8.1	-3.6
Non-Resident Jamaicans	17.5	17.5	0.0
6. VISITOR EXPENDITURE (US\$ MILLION)	3,005	3,312	10.2
Stopovers	2,828	3,121	10.4
Average Expenditure/person/night US\$	148.61	162.13	9.1
Cruise Passengers	177	191	7.9
Average Expenditure/person US\$	93.43	100.47	7.5
7. EMPLOYMENT IN ACCOMMODATION SECTOR	48,439	50,113	3.5

* Excluding Closed Rooms

R&MI/JTB 2018

TABLE 2

TOTAL STOPOVER ARRIVALS BY MONTH: 2014 - 2018

	2014	2015	2016	2017	2018
January	169,280	176,621	179,559	185,873	194,609
February	169,328	177,805	185,272	186,670	193,575
March	200,732	212,134	219,673	212,600	236,818
April	181,664	189,903	188,604	205,822	204,734
Jan.-Apr.	721,004	756,463	773,108	790,965	829,736
May	166,249	168,347	167,884	181,669	195,491
June	187,083	182,364	194,088	211,119	229,261
July	221,006	220,662	228,169	248,626	257,050
August	171,486	169,063	169,023	192,878	206,034
September	106,757	114,280	120,340	131,416	134,910
October	135,730	134,317	135,467	157,380	162,552
November	157,737	158,450	163,152	187,062	196,546
December	213,129	219,096	230,453	251,800	261,147
May - Dec.	1,359,177	1,366,579	1,408,576	1,561,950	1,642,991
Jan. - Dec.	2,080,181	2,123,042	2,181,684	2,352,915	2,472,727
% Inc./Dec.	3.6	2.1	2.8	7.8	5.1

FIGURE 2

STOPOVER ARRIVALS TO JAMAICA 2014 - 2018

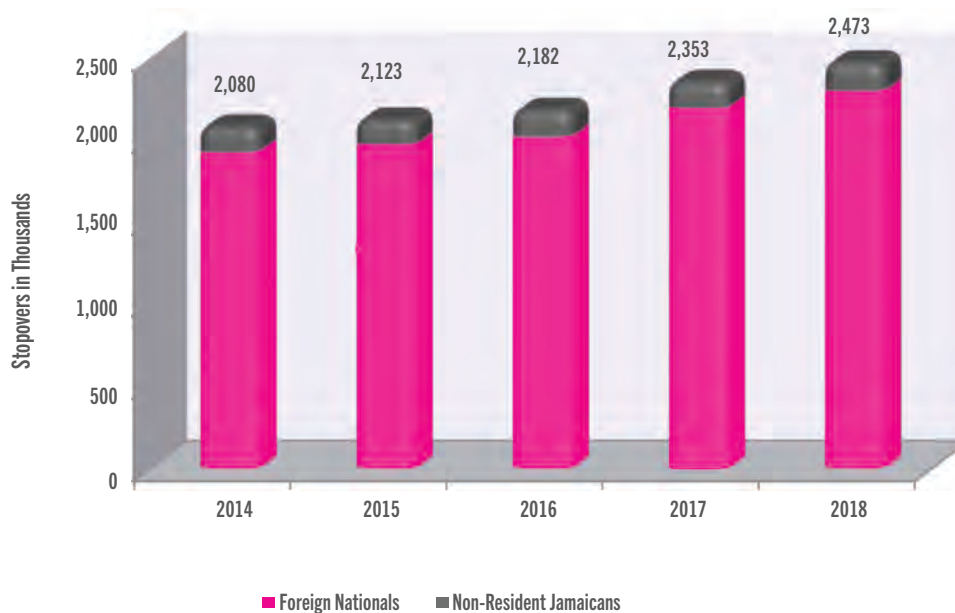


TABLE 3

STOPOVER VISITORS BY MARKET SHARE

COUNTRIES	Stopovers in Thousands								%Change 2018/17
	2015	%Share	2016	%Share	2017	%Share	2018	%Share	
US	1,344.1	63.3	1,406.1	64.4	1,510.0	64.2	1,628.4	65.9	7.8
CANADA	391.4	18.4	372.1	17.1	405.2	17.2	400.0	16.2	-1
EUROPE	279.3	13.2	294.7	13.5	325.8	13.8	328.4	13.3	0.8
CARIBBEAN	62.6	2.9	65.6	3.0	63.9	2.7	67.5	2.7	5.6
LATAM	29.4	1.4	27.7	1.3	32.2	1.4	33.9	1.4	5.3
OTHER	16.2	0.8	15.5	0.7	15.8	0.7	14.6	0.6	-7.8
TOTAL	2,123.0	100.0	2,181.7	100.0	2,352.9	100.0	2,472.7	100.0	5.1

FIGURE 3

STOPOVER VISITORS BY MARKET SHARE

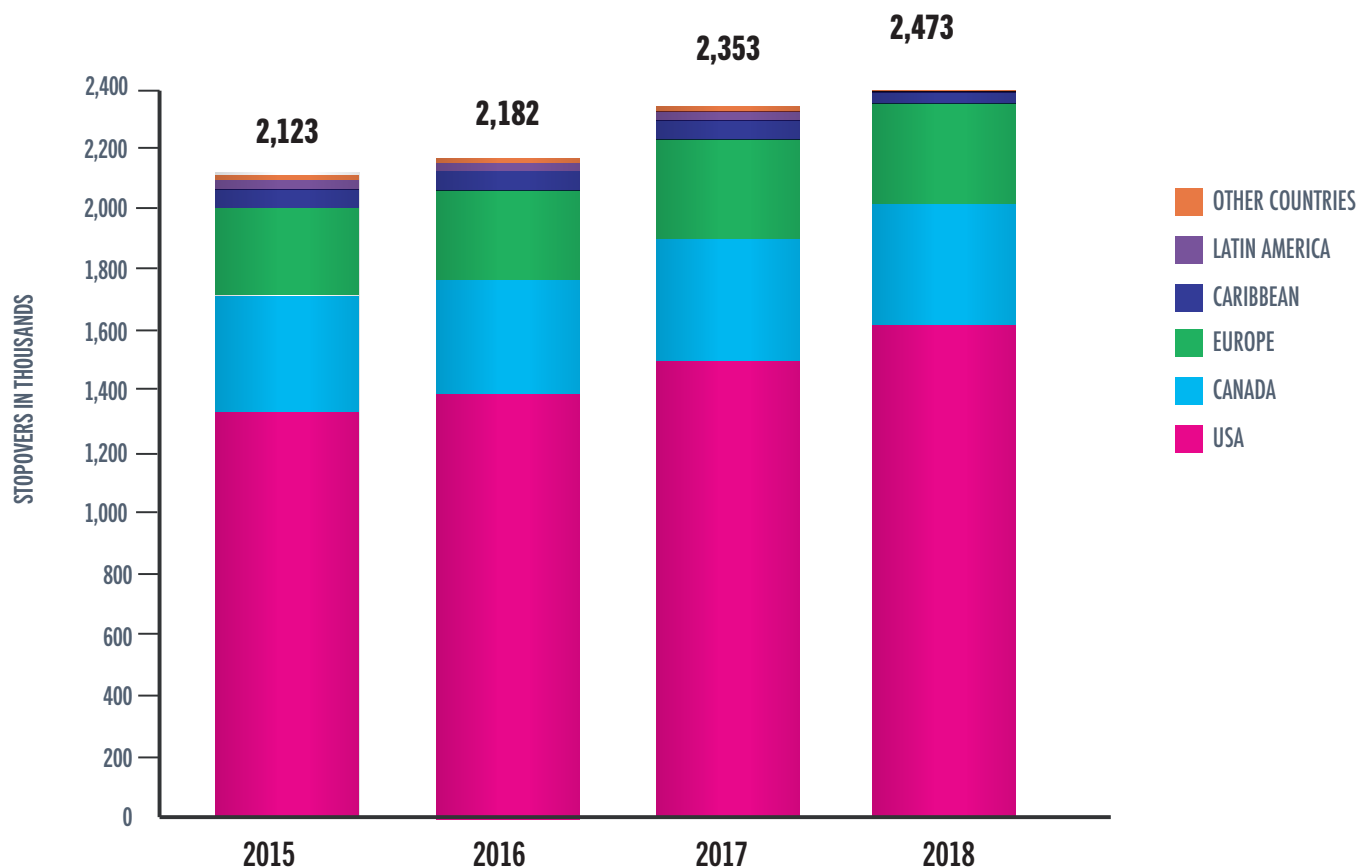


FIGURE 14

HOTEL ROOM OCCUPANCY BY RESORT AREA

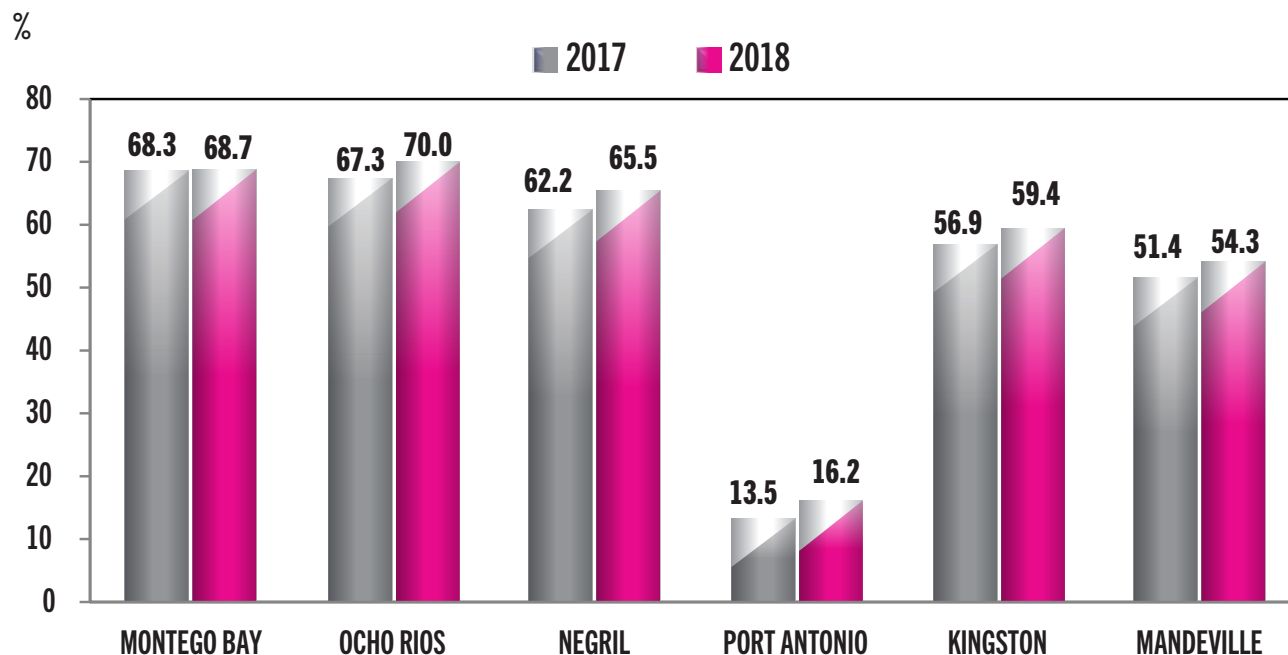


FIGURE 14A

HOTEL ROOMS SOLD BY RESORT AREA

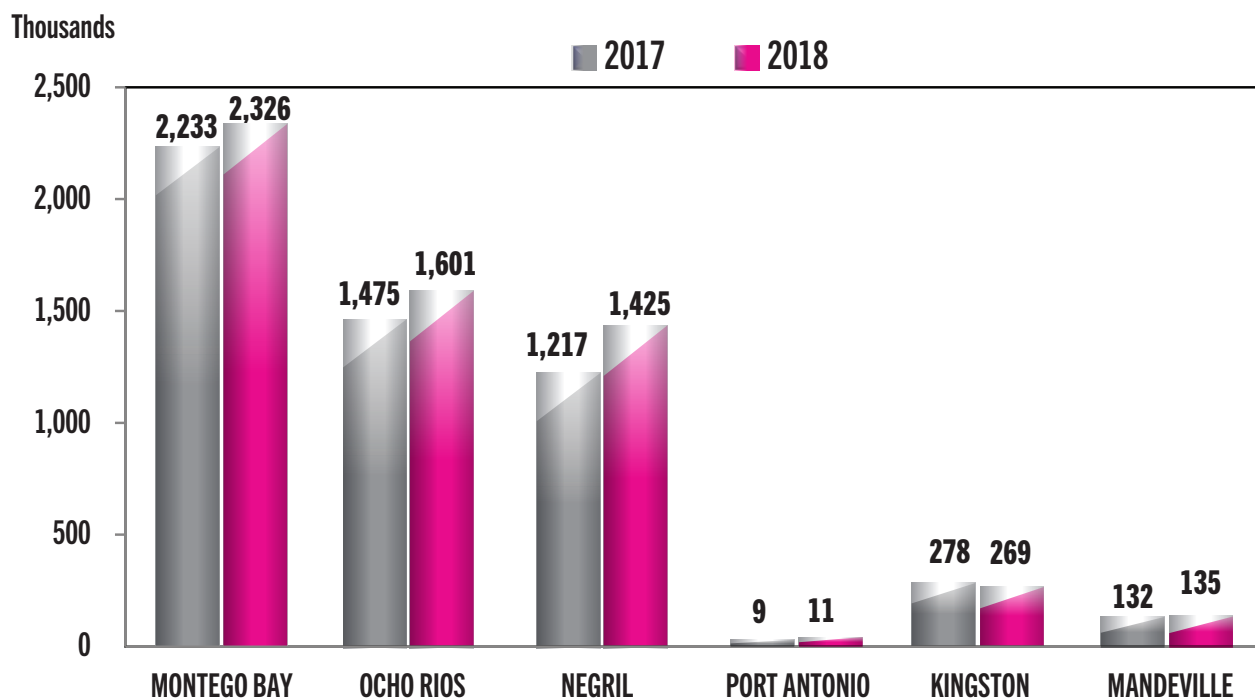


TABLE 26

TOURIST ACCOMMODATION BY YEAR AND AREA 2015 - 2018

	ROOMS				%Change 2018/17	%Share 2018	BEDS					%Change 2018/17	%Share 2018
	2015	2016	2017	2018			2014	2015	2016	2017	2018		
HOTELS													
Kingston	1,668	1,668	1,659	1,637	-1.3	6.5	2,937	3,367	3,367	3,349	3,305	-1.3	6.5
Montego Bay	7,684	8,829	9,201	10,175	10.64	0.6	15,499	15,575	17,739	18,483	20,427	10.5	40.0
Ocho Rios	6,014	6,275	6,183	6,244	1.0	24.9	10,898	12,926	13,454	13,122	13,244	0.9	25.9
Negril	5,076	5,107	5,978	5,837	-2.4	23.3	10,697	10,296	10,358	11,738	11,754	0.12	3.0
Port Antonio	173	183	240	287	19.6	1.1	356	336	256	480	574	19.6	1.1
Southcoast	839	850	881	911	3.4	3.6	1,624	1,644	1,666	1,728	1,812	4.9	3.5
Total	21,454	22,912	24,142	25,091	3.9	100.0	42,011	44,144	46,840	48,900	51,116	4.5	100.0
GUEST HOUSES													
Kingston	608	850	882	868	-1.6	23.3	1,293	1,277	1,625	1,709	1,681	-1.62	2.7
Montego Bay	565	587	591	577	-2.4	15.5	1,055	1,133	1,173	1,169	1,137	-2.71	5.4
Ocho Rios	458	481	511	530	3.71	4.2	782	918	964	1,022	1,068	4.51	4.4
Negril	787	791	796	782	-1.8	21.0	1,550	1,582	1,586	1,596	1,558	-2.42	1.1
Port Antonio	323	331	338	316	-6.5	8.5	637	653	669	678	628	-7.4	8.5
Southcoast	655	697	711	653	-8.2	17.5	1,211	1,331	1,411	1,439	1,325	-7.91	7.9
Total	3,396	3,737	3,829	3,726	-2.7	100.0	6,528	6,894	7,428	7,613	7,397	-2.8	100.0
RESORT VILLAS													
Kingston	0	8	8	8	-	0.2	0	0	16	16	16	-	0.3
Montego Bay	1,098	1,109	1,159	1,190	2.7	37.1	2,084	2,154	2,172	2,268	2,332	2.8	37.1
Ocho Rios	728	740	765	795	3.9	24.8	1,316	1,468	1,492	1,542	1,590	3.1	25.3
Negril	665	711	712	716	0.6	22.3	1,373	1,331	1,429	1,431	1,439	0.6	22.9
Port Antonio	261	303	311	276	-11.3	8.6	483	512	595	609	539	-11.5	8.6
Southcoast	192	203	207	219	5.8	6.8	318	322	336	338	362	7.1	5.8
Total	2,944	3,074	3,162	3,204	1.3	100.0	5,574	5,787	6,040	6,204	6,278	1.2	100.0

TABLE 26A

TOURIST ACCOMMODATION BY YEAR AND AREA 2015 - 2018

	ROOMS				%Change 2018/17	%Share 2018	BEDS					%Change 2018/17	%Share 2018
	2015	2016	2017	2018			2014	2015	2016	2017	2018		
APARTMENTS													
Kingston	78	76	76	76	0.0	9.3	156	156	152	152	152	0.0	9.7
Montego Bay	128	128	125	207	65.6	25.3	256	256	256	250	414	65.6	26.5
Ocho Rios	333	400	422	460	9.0	56.2	676	682	818	862	838	-2.8	53.7
Negril	49	49	69	49	-29.0	6.0	104	104	104	144	104	-27.8	6.7
Port Antonio	10	10	10	10	0.0	1.2	20	20	20	20	20	0.0	1.3
Southcoast	16	16	16	16	0.0	2.0	32	32	32	32	32	0.0	2.1
Total	614	679	718	818	13.9	100.0	1,244	1,382	1,382	1,460	1,560	6.8	100.0
ALL TYPES OF ACCOMMODATION													
Kingston	2,354	2,602	2,625	2,589	-1.4	7.9	4,386	4,800	5,160	5,226	5,154	-1.4	7.8
Montego Bay	9,475	10,653	11,076	12,149	9.7	37.0	18,894	19,118	21,340	22,170	24,310	9.7	36.6
Ocho Rios	7,533	7,896	7,881	8,029	1.9	24.4	13,672	15,994	16,728	16,548	16,740	1.2	25.2
Negril	6,577	6,658	7,555	7,384	-2.3	22.5	13,724	13,313	13,477	14,909	14,855	-0.4	22.4
Port Antonio	767	827	899	889	-1.1	2.7	1,496	1,521	1,540	1,787	1,761	-1.5	2.7
Southcoast	1,702	1,766	1,815	1,799	-0.9	5.5	3,185	3,329	3,445	3,537	3,531	-0.2	5.3
Total	28,408	30,402	31,851	32,839	3.1	100.0	55,357	58,207	61,690	64,177	66,351	3.4	100.0

Note:

1) Visitor Accommodation excludes closed properties. The Jamaica Tourist Board in consultation with the Tourism Product Development Co. continues to update the listing of accommodations offered. Some accommodations have been removed from the listing because they are no longer being used as tourist accommodation.

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

FIGURE 20

EMPLOYMENT IN ACCOMMODATION SECTOR BY AREA 2018

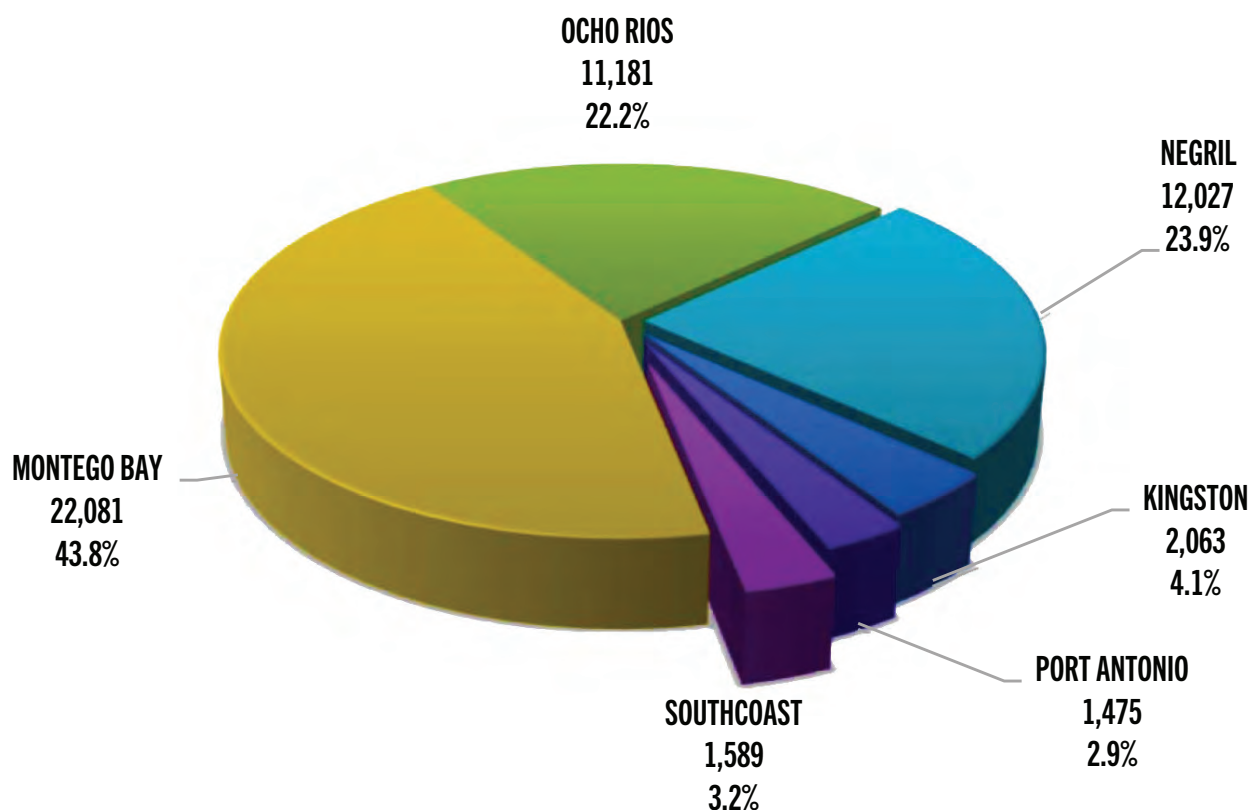


TABLE 27

EMPLOYMENT IN ACCOMMODATION SECTOR

	2014	2015	2016	2017	2018
MONTEGO BAY	12,777	15,530	20,518	21,126	22,081
OCHO RIOS	8,406	9,458	9,862	21,126	11,181
NEGRIL	9,810	9,712	11,879	11,874	12,027
KINGSTON	1,760	1,982	2,082	2,082	2,063
PORT ANTONIO	1,113	1,182	1,296	1,520	1,475
SOUTHCOAST	1,300	1,391	1,335	1,597	1,589
TOTAL	35,166	39,255	46,972	48,439	50,416

TABLE 28
TOURIST BOARD BUDGET

	APPROVED	
	J\$,000	**US\$,000
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
2017/18	4,333,694	32,341
2018/19	4,373,330	33,641

TABLE 29
ESTIMATED GROSS FOREIGN
EXCHANGE EARNINGS

	J\$,000	**US\$,000
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	326,464,982	2,608,798
2017	385,703,226	3,004,855
2018	428,785,878	3,305,472

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

FIGURE 21

TOURIST BOARD APPROVED BUDGET

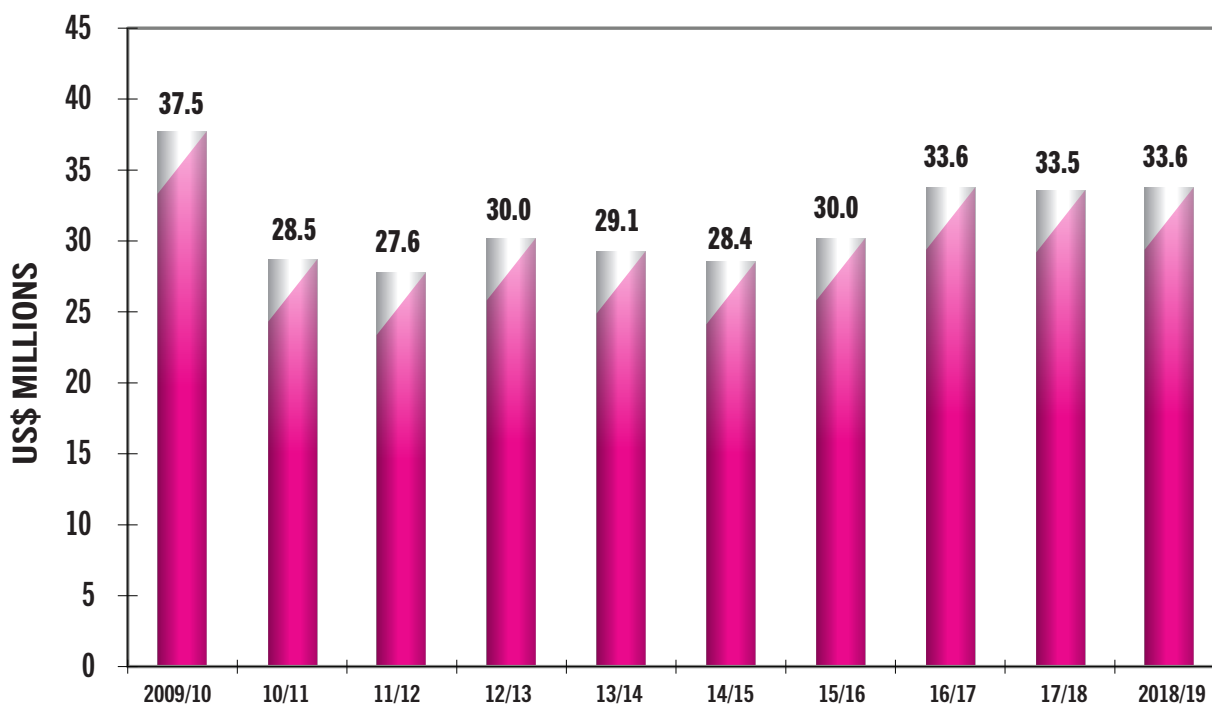
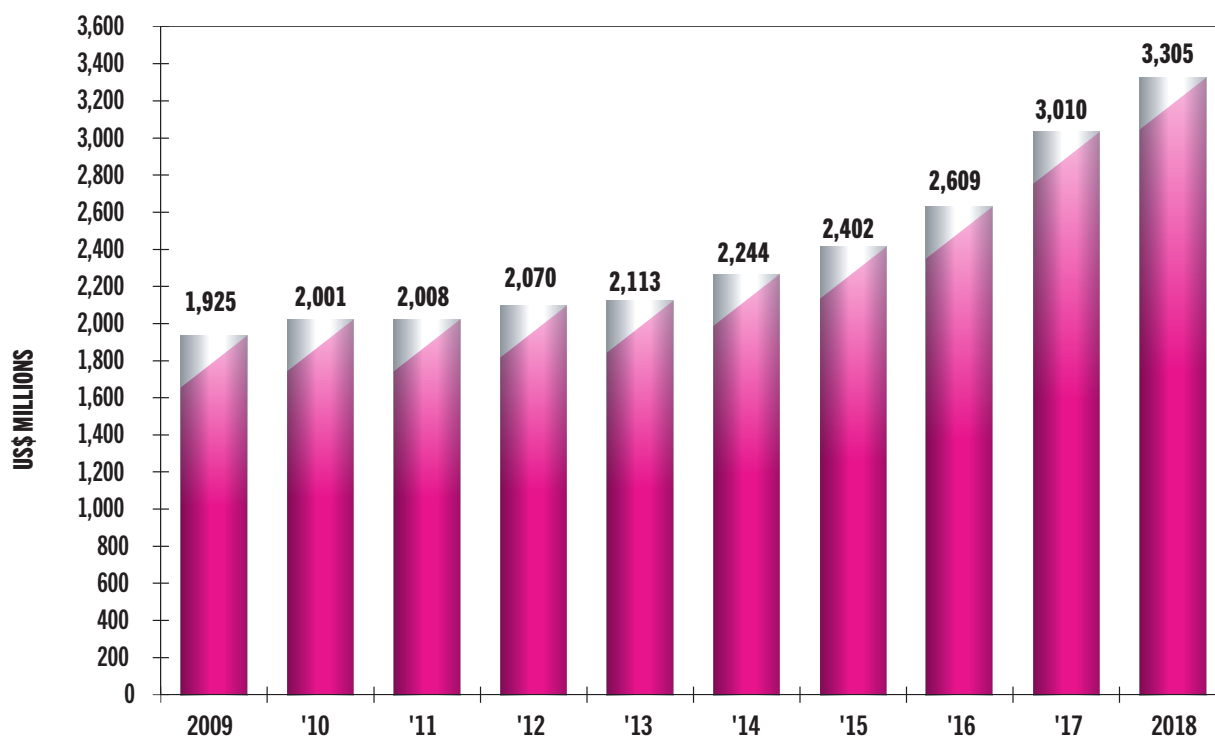


FIGURE 22

VISITOR EXPENDITURE 2009 - 2018





APPENDIX 2

COMPENSATION

JAMAICA[®]
ONE LOVE

APPENDIX 2

JAMAICA TOURIST BOARD - BOARD OF DIRECTORS COMPENSATION

	Position of Senior Executive	Year	Salary	Travelling/ Milage	Pension	Other Allowances	TOTAL
			\$	\$	\$	\$	\$
John Lynch	Chairman	2018/19	166,500.00				166,500.00
Godfrey Dyer	Member	2018/19	110,000.00				110,000.00
Josef Forstmayr	Member	2018/19	82,550.00				82,550.00
Wayne Cummings	Member	2018/19	104,650.00				104,650.00
Philipp Hofer	Member	2018/19	33,000.00				33,000.00
Lionel Reid	Member	2018/19	88,000.00				88,000.00
Paul Simpson	Member	2018/19	64,250.00				64,250.00
Bertram Wright	Member	2018/19	88,000.00				88,000.00
Fred Smith	Member	2018/19	121,000.00				121,000.00
Hyacinth Lightbourne	Member	2018/19	208,250.00				208,250.00
Nicola Madden Greig	Member	2018/19	170,750.00				170,750.00

JAMAICA TOURIST BOARD - SENIOR EXECUTIVES COMPENSATION

LOCAL OFFICES

POSITON OF SENIOR EXECUTIVE	YEAR	SALARY	GRATUITY	PERFORMANCE INCENTIVE	TRAVELLING/ VALUE OF ASSIGNED CAR	PENSION	OTHER ALLOWANCES	NON-CASH BENEFITS	TOTAL
		\$	\$	\$	\$		\$		\$
Donovan White Director of Tourism (Contract)	2018/19	15,837,000			140,000	No	4,600,000	Health Insurance	20,577,000
Camile Glenister D/Director - Marketing (Contract)	2018/19	1,591,769			362,820	No	1,201,404	Health Insurance	3,155,992
Peter Mullings Head, Technolgy and Administration (Contract)	2018/19	6,982,500	1,670,303		1,542,864	No	331,038	Health Insurance	10,526,705
Errol Jones Chief Financial Officer (Contract)	2018/19	5,554,984	1,173,603	205,826	1,625,276	No	822,480	Health Insurance	9,176,343
Odette Soberam-Dyer Regional Director - Jamaica (Contract)	2018/19	3,972,734		167,710	1,507,287	No	713,442	Health Insurance	6,193,462

OVERSEAS OFFICES

POSITON OF SENIOR EXECUTIVE	YEAR	SALARY	GRATUITY	PERFORMANCE INCENTIVE	TRAVELLING/ VALUE OF ASSIGNED CAR	PENSION	OTHER ALLOWANCES	NON-CASH BENEFITS	TOTAL
Donald Dawson Deputy Director - USA	2018/19	US\$ 88,031	US\$	US\$ 1,701	US\$ 9,444	Yes	US\$ 64,191	Health Insurance	US\$ 163,367
Phillip Rose Regional Director - Canada	2018/19	CAN\$ 82,303	CAN\$	CAN\$ 3,081	CAN\$ 9,909	Yes	CAN\$ 62,177	Health Insurance	CAN\$ 157,469
Elizabeth Fox Regional Director - UK	2018/19	£ 49,268	£	£ 947	£ 5,688	Yes	£ 35,187	Health Insurance	£ 91,090
Gregory Shervington Regional Director - Europe	2018/19	€ 67,281	€	€ 1,296	€ 8,760	No	€ 62,196	Health Insurance	€ 139,533

1. D/Director-Marketing commenced working at JTB on January 7,2019
2. Benefit in Kind of Motor Vehicle \$140,000

JAMAICA[®]

ONE LOVE

The Blue Mountains, Kingston
Photo Credit: Jamaica Tourist Board

JAMAICA TOURIST BOARD WORLDWIDE

JAMAICA

KINGSTON

64 Knutsford Boulevard
Kingston 5
Jamaica, West Indies
Tel: (876) 929-9200
Fax: (876) 929-9375
Email: information@visitjamaica.com

MONTEGO BAY

Montego Bay Convention Centre
Rose Hall, Montego Bay
Jamaica, West Indies
Tel: (876) 952-4425
Fax: (876) 952-3587

UNITED STATES (US)

5201 Blue Lagoon Drive,
Suite #670
Miami, FL 33126
Tel: (305) 665-0557
Fax: (305) 666-7239
US Toll Free 1-800-233-4582
Email: info@visitjamaica.com

GROUPS & CONVENTIONS

5201 Blue Lagoon Drive,
Suite #670
Miami, FL 33126
Tel: (305) 665-0557
Fax: (305) 666-7239
US Toll Free 1-800-233-4582
Email: groups@visitjamaica.com

LATIN AMERICA MARKETING REPRESENTATIVE

Global Marketing & Sales (Alex Pace)
Tel: (305) 665-0557 ext. 580
Fax: (305) 666-7239
Email: alexpace@lgms.com

CANADA

303 Eglinton Avenue East, Suite 200
Toronto, Ontario M4P 1L3
Tel: (416) 482-7850
Fax: (416) 482-1730
Email: jtbcanada@visitjamaica.com

UK/EUROPE

1-2 Prince Consort Road
London, England SW7 2BZ
United Kingdom
Tel: (44) 207-225-9090
Email: mail@visitjamaica.com

CONTINENTAL EUROPE GERMANY (REGIONAL OFFICE)

c/o The Jamaican Embassy
Schmargendorferstr. 32
12159 Berlin-Friedenau
Federal Republic of Germany
Tel: 49 30 85 99 45 18
Fax: 49 30 85 07 92 87
Email: gshervington@visitjamaica.com

REPRESENTATIVES:

Grafenstein Freizeit-und-Tourismuswerbung
GmbH
Tempelhofer Damm 94a
12101 Berlin
Federal Republic of Germany
Tel: 49 30 80 58 59 290
Fax: 49 30 80 58 59 210
Email: fg@grafenstein.net

FRANCE

Keys by Indigo
4 Bis rue Descombes
75017 Paris, France
Tel: +33 1 40 28 10 00
Email: sl@indigofrance.com

ITALY

Interface Tourism Italy
Via Carducci 36
20123 Milan, Italy
Tel: (39) 0283-660917
Email: attilia.bossi@interfacetourism.com

SPAIN

Interface Tourism Spain
Cardenal Cisneros 51
28010 Madrid, Spain
Tel: (34) 91 54 0180-5
Fax: (34) 91 54 2139-6
Email: chris.pomeroy@interfacetourism.com or
monica.bonilla@interfacetourism.com

THE NETHERLANDS

c/o Color Travel Services
PO Box 2073
3440DB Woerden
The Netherlands
Tel: (31) 348-430829
Fax: (31) 348-482307
Email: info@ontdekjamaica.nl

ASIA

REPRESENTATIVES:

INDIA

c/o TRAC Representations
A16, 6th Floor, Himalaya House
Kasturba Ghandi Marg
New Delhi 110001, India
Tel: (91) 11-23352550
Fax: (91) 11-23350270
Email: rn@tracrep.com

CHINA

c/o China Business Network
Oriental Media Tower
Building A610
No. 4 Guanghua Road
CBD, Beijing, P.R. China
Tel: +86 10 65816820-608
Fax: +86 10 65836205
Email: Beijing@chinaBN.org
Email: London@chinaBN.org

www.visitjamaica.com

