

ANNUAL REPORT

OF THE

JAMAICA TOURIST BOARD

APRIL 2006 – MARCH 2007

JAMAICA TOURIST BOARD

MISSION STATEMENT

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

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JAMAICA TOURIST BOARD

BOARD OF DIRECTORS

APRIL 2006 – MARCH 2007

Mr. Dennis Morrison	-	Chairman
Mr. Paul Pennicook *	-	Director of Tourism
Mr. Donnie Dawson**		
Mr. Basil Smith***		
Mr. Horace Peterkin	-	Hotelier; President of the Jamaica Hotel & Tourist Association
Mr. Josef Forstmayr	-	Hotelier
Mrs. Zein Issa Nakash	-	Vice President – Corporate Marketing and Environmental Affairs, SuperClubs
Mr. Michael Muirhead	-	Businessman
Mr. Godfrey Dyer	-	Businessman
Mr. Jason Henzell	-	Owner/Manager, Jakes Resorts
Mr. Ohene Blake	-	Information Technology Consultant
Mr. O.K. Melhado	-	Banker
Ms. Carolyn Wright	-	General Manager, Rondel Village Ltd. Negril
Ms. Marcel Holder	-	Information Technology Audit Specialist, Ministry of Finance

Ex-Officio Members:

Mrs. Jennifer Griffith	-	Permanent Secretary, Ministry of Tourism, Entertainment & Culture
Ms. Carrole Guntley	-	Director General, Ministry of Tourism, Entertainment & Culture
Ambassador Frank Pringle	-	Tourism Consultant

N.B. * Mr. Paul Pennicook's tenure as Director of Tourism came to an end on February 28 and he demitted office on May 31, 2006.

** Mr. Donnie Dawson acted as Director of Tourism from June 1, 2006 to October 31, 2006.

*** Mr. Basil Smith appointed Director of Tourism on November 1, 2006.

INTRODUCTION

The year 2006 proved to be a phenomenal year for the growth of tourism in Jamaica due to the cooperative efforts of all stakeholders, both in the private and public sectors. The island achieved a record performance in visitor arrivals with 1.68 million stopover arrivals in 2006, a 13.5% increase over the 1.48 million recorded for 2005. Cruise passenger arrivals to Jamaica recorded a 17.7% increase in 2006, with 1.336 million arrivals as against 1.136 million in 2005.

Factors contributing to this growth were Jamaica's aggressive sales activities during the period, which targeted travel agents, tour operators and reservation agents through seminars, sales calls, training workshops and various industry shows in all our major markets; sustained public relations activities in the USA, Canada and the United Kingdom markets through the "**Genius of Jamaica**" and the "**Jamaica - Take another Look**" campaigns respectively; several major promotions involving radio stations, in-store/malls, consumer events and fairs; and the continuation of our very successful international advertising campaign under the slogan "**Once you go, You Know**", with a creative mix of television, print, online and cinema advertising.

The targeting of new markets forms part of an aggressive agenda by the JTB to diversify the nation's tourism markets as stipulated in the Tourism Master Plan for Sustainable Development. During the current year, the Jamaica Tourist Board made a thrust into the new markets of India, China and Ireland.

In India, the JTB retained the services of TRAC Representation (India) Private Ltd. with effect from May 31, 2006 to promote destination Jamaica in the **Indian** market. TRAC's responsibilities include, among others, providing marketing and communications support in the form of trade servicing, events advertising and public relations activities. The 2007 Cricket World Cup event was used to springboard its activities in India.

The Jamaica Tourist Board has made inroads in the **China** market as part of its strategy to make Chinese consumers aware of the destination. As a result, representations were made by the JTB at the Beijing International Travel & Tourist Market (BITTM), now renamed the China Outbound Travel & Tourism Market (COTTM). This is the major travel trade show in China facilitating industry stakeholders in the outbound travel market. The JTB also accommodated press and travel agent familiarization tours from China.

Dubbed “Jamrock meets Shamrock”, the marketing efforts in **Ireland** spearheaded through the JTB’s London office prepared the way for increased travel from Ireland to Jamaica. The JTB participated in the major travel trade and consumer shows in Ireland as well as played host, on island, to three Irish media houses in 2006.

Ireland was also one of the countries which competed in the ICC Cricket World Cup 2007. The team was based in Jamaica and one of their matches coincided with St. Patrick’s Day, March 17. The occasion was celebrated by several events planned by various industry stakeholders.

In recognition of the vital role played by Jamaicans living overseas to consolidate the global appeal of brand Jamaica, the Jamaica Tourist Board continued to address and work with the **Diaspora** in various ways. The JTB also continued its active promotion of and increased appreciation of domestic tourism through its Tourism Awareness Programme, working with schools and other institutions.

Among the challenges with which the industry was faced during the year under review were:

- The Western Hemisphere Travel Initiative, the requirement by the US Government for all US citizens returning home by air from most

Caribbean territories, Mexico and Canada to have a Passport, in order to re-enter the country after January 23, 2007. Jamaica opted to put in place a number of initiatives designed to sensitise the US consumer to the need to obtain a passport and – in partnership with various private sector interests – even produced incentives for doing so. Through a creative joint sales/P.R. effort the JTB team worked with the US Post Office and the Department of Homeland Security to have persons sign up for their passports, while sampling Jamaican coffee and getting destination information from our sales team, at our Morning Coffee Breaks held at some of the busiest stations across the US.

In addition to hosting these coffee stations, the JTB along with private stakeholders implemented a Passport to Rewards programme to encourage persons to apply for their passports and to come to Jamaica. The JTB also undertook an advertising campaign in various media cross the USA.

- The CARICOM Special Visa, introduced for Cricket World Cup 2007, posed quite a challenge, particularly for our European business but also for those visitors living in the US who travel on passports from other countries. Through the efforts of our European team, the Jamaican Consulates/Embassies and the Immigration Departments, avenues were sought and put in place to minimize the possible negative impacts of the visa requirement.
- Climatic conditions in the USA – warmer climatic conditions caused by global warming meant that the cold weather effects of winter were felt much later this winter, hence many Americans opted to stay home.

The Jamaica Tourist Board was represented on the legislative review committee established by the Ministry of Tourism, Entertainment & Culture to review **The Tourist Board Act** with a view to making this piece of legislation more current and relevant to the local and international tourism industry. During the course of the year, consultations conducted by the Ministry continued with the tourism private sector interests as well as internal constituents on the proposed amendments to the Act and the development of the companion regulations for the tourism sub-sectors.

Trademark Registration

During the course of the year under review, the Jamaica Tourist board secured registration in the USA for its historical corporate brand **JAMAICA** and trailblazing tagline **ONCE YOU GO...YOU KNOW**

CRICKET WORLD CUP 2007

Jamaica co-hosted with several Caribbean countries the ICC Cricket World Cup 2007 in March/April. The spectacular opening ceremony took place on March 11 at the Trelawny Multipurpose Stadium with a cast of 2,045 young persons delivering a culturally enriched entertainment package. Jamaica was the only host venue which received all 16 teams who were on hand for the ceremony.

It was the JTB's intention to ride on the legacy of that tournament and to use the event as a springboard for diving into new markets.

The two main markets for this effort were Ireland and India and in 2006, the JTB along with Ambassador, Courtney Walsh, Jamaica Cricket 2007 (Local Organising Committee) and Air Jamaica engaged in promotional tours in both countries. During those tours we encouraged Irish citizens to come to Jamaica in support of their team's inaugural appearance in the tournament and invited persons to celebrate St. Patrick's Day on the island.

Advertising support materials were created using the image of Ambassador Walsh for promotional support. These were in high demand and served to increase awareness of the destination and solidify the Jamaica brand as a major sports tourism destination.

Through the appointment of the marketing representative in India, TRAC Ltd., the JTB-led delegation 'bowled' a marvellous inning for Jamaica with "man of the match" Ambassador Courtney Walsh capturing the hearts of cricket lovers in that country while drumming up support for Jamaica as the destination of choice for the games.

Marketing activities were undertaken in a number of Caribbean Diaspora cities in the USA, Canada and the UK geared at stimulating interest in travel to Jamaica and the Caribbean.

The activities provided the framework within which efforts can be coordinated for further development of some of these emerging/non-traditional markets. The year 2007 will therefore provide the benchmark year for further development.

The series of promotional tours also incorporated activities in Britain and specifically at the World Travel Market in London. In addition to this, an advertisement relating to CWC in Jamaica was designed and specifically aired to coincide with the staging of the Ashes series on British television.

The JTB had to be extremely creative in the marketing approach adopted as restrictions placed on us by the ICC did not give us much latitude in using the event to promote the island. We were not even permitted to use the logo in marketing the island for the tournament.

This, while providing a challenge, did not deter the efforts of the JTB to keep the attention of the international markets on Jamaica.

The JTB also worked on a number of initiatives in Jamaica with the Local Organising Committee, including liaising with overseas media covering the tournament and organising special tours on “off days” for accredited media who were on island for the event, providing assistance with the planning and execution of the Prime Minister’s reception at the Rose hall Great House in Montego Bay, and co-hosting the opening of the Cricket Village at The Cable & Wireless Golf Academy in Kingston

ADVERTISING PROGRAMME

Foote, Cone and Belding (FCB) continued to be the Board’s advertising agency for the period under review (fiscal 06/07), after having been re-appointed for a period of three (3) years, effective May 1, 2004. FCB’s advertising and marketing activities are carried out on behalf of the Jamaica Tourist Board in the United States, Canada and the United Kingdom/Europe.

The award-winning campaign under the marketing platform ***Once you go, you know***, continued to be visible via a multi-media effort including Television, Print and Online media activities. Advertising continued to reach both consumer and travel trade audiences. The comprehensive programme, which addressed all of the island’s core target audiences, was extended to the United States, Canada, United Kingdom, Italy, Ireland, Holland, Spain, Germany and the Netherlands. Among the core and special target segments to which advertising efforts were extended were:

- Honeymooners
- Golf Enthusiasts
- African Americans

- Meeting & Incentive Travel Planners
- Spring Breakers
- Travel Agents

Geography

United States

In the United States, the Jamaica Tourist Board's fiscal year 2006/07 efforts consisted of multi-media initiatives. The campaign objectives focused on continuing to launch the ***Once you go, you know*** campaign in a visible manner and increase brand preference/consideration of Jamaica. Specifically, the media plan was developed to surround the consumer segments and activate response while maintaining a balance between high impact and efficiency.

Canada

The media mix was expanded this year to include niche targeted print, as well as an online campaign.

United Kingdom/Europe

In UK/Europe, efforts continued to focus on the ***Once you go, you know*** campaign and were executed across various routes to media, which included Trade and Consumer Press, TV and Online.

Creative Campaign

The ***Once you go, you know*** campaign continued to air the trio of commercials (the "**Work Horse**", the "**Journal**" and "**Bus**"), each delivering against complementary strategic objectives. The "**Work Horse**" spot is a montage that captured those special places to go, things to do and experiences to share in Jamaica. The "**Journal**" family spot and "**Bus**" romance spot captured the powerful emotional impact a Jamaican holiday can uniquely deliver. Together, these creative units provided a robust and comprehensive view of Jamaica's

appeal and all that the destination offered, showcasing the awesome natural beauty of the island.

In print, the ***Once you go, you know*** campaign continued to speak to what truly sets Jamaica apart and which can only be fully appreciated/understood when a personal visit is made to Jamaica. It is something magical which makes visitors want to visit the island after seeing the advertising. Each advertisement captured a unique experience only to be found in Jamaica.

Media Highlights

Television advertising aired on both national and local markets during the months of May/June, October/November 2006 and January/February 2007. On a national level, Jamaica's advertising ran across a more concentrated list of targeted cable networks to increase frequency reaching Jamaica's best prospects. Similar to 2005, **Hotelvision** ran during each Cable flight. **Hotelvision** consisted of advertising within upscale hotels rooms nationwide. Consistent with previous years, the successful weather-focused programme ran in December-March. The customized vignette and billboards ran alongside the Jamaica commercial.

Cable Networks included:

- | | | |
|-------------------|----------------|--------------------|
| ▪ CNN | ▪ E! | ▪ Biography |
| ▪ Fox News | ▪ MSNBC | ▪ CNBC |
| ▪ BET | ▪ TLC | ▪ Court TV |
| ▪ Food | ▪ Weather | ▪ Fox News |
| ▪ Travel Channel | ▪ A & E | ▪ Natl. Geographic |
| ▪ Weather Channel | ▪ BBC American | ▪ Discovery Health |

On a local level, highly efficient direct response Television was secured across key markets. Market selection was driven by seasonal factors and varied by flight. In May/June (2006), activity ran in:

- Atlanta
- Chicago
- Dallas
- Los Angeles
- New York
- Philadelphia
- Washington DC

During the October/November timeframe, Jamaica advertising ran in:

- Atlanta
- Chicago
- Detroit
- Minneapolis
- New York
- Philadelphia
- Washington DC

Additionally, in January/February/March (2007), activity aired in:

- New York
- Chicago
- Philadelphia
- Atlanta
- Dallas
- Los Angeles
- Washington DC
- Baltimore
- Boston

Continuing to capitalize on the cold winter in Northeast and Midwest markets, Jamaica’s weather-focused effort employed a unique “weather-triggered” strategy to air 10 seconds radio announcements when snow (3+ inches) hit in key markets., with consumers being reminded of the warm weather in Jamaica. In October/November 2006, Jamaica radio aired in Baltimore and spots ran throughout the day across top formats listened to by the target audience (Sport, Rock, Talk, Adult Hits, Urban Contemporary and Classic Rock)

PRINT:

Jamaica’s refined print efforts were concentrated with lead upscale travel publishing and highly targeted magazines were selected to reach the target, focusing on their passion. Publications included:

Travel: Conde Nast Traveler, Travel & Leisure, Departures, Caribbean Travel and Life.

Epicurean: Bon Appetit, Gourmet, Food and Wine

Lifestyle: Vanity Fair

Golf: Golf Digest, Travel & Leisure Golf

Brides: Brides, Instyle Weddings, Modern Bride, Elegant Bride

Beyond traditional online advertising (banners and emails), Jamaica incorporated Search (Google) which has continued to be highly efficient in driving traffic to visitjamaica.com. In the first quarter of 2007, Jamaica launched its first ever mobile campaign with weather.com. The campaign was highly successful.

SPECIAL EFFORTS

Annie's Revenge Golf Event

In conjunction with Travel & Leisure Golf, Jamaica created the 1st annual Pro-Am Invitational on-island event "Annie's Revenge" in November 2006. The programme was highly successful, driving over 200 golfers to attend the event. Custom in-book pages, inserts, promotional pages and 1/3 pages drove golfers to a custom micro site which featured event details, including enrollment options. Direct mail and emails were sent to Travel & Leisure subscribers to promote the event.

Groups & Conventions

The JTB's Groups & Conventions department was supported by a campaign running in various media vehicles. This media activity significantly enabled publisher support for key special events in Jamaica, including **JAMEX (The Jamaica Meetings Exchange) Conference** and the **One Love Classic – Golf Tournament**.

In Canada, the media mix was expanded this year to include niche targeted print, as well as an online campaign. The niche targeted print reached the golf and wedding segments. Two insertions ran in **Today's Bride**, one of Canada's top bridal publications, and in **Golf Canada**, the official publication of the Royal Canadian Golf Association.

Due to the success of the partnership with Rogers' women's publications last year, it was executed again this year. Insertions ran in several publications from September through December.

In the UK and Europe, the efforts for the fiscal year 06/07 continued to focus on the *Once you go, you know* campaign and were executed across various routes to media, which included Trade and Consumer Press, TV and Online. Consistent with 05/06 strategies, both trade and Consumer Press had been the focal point for the UK and Europe campaign in 06/07. Within Europe, the focus was on Germany, Holland, Ireland, Italy and Spain.

In the UK, a campaign was executed to run alongside the publicity for the Cricket World Cup from October 2006 to January 2007. National Press as well as Satellite TV was used.

PUBLIC RELATIONS

For the fiscal year 2006/2007, the Board's Public Relations Agency for the Americas, which included the USA, Canada, Hispanic US and Latin America, remained Ruder Finn, Inc., based in New York. The agency's initial two-year contract, which began in October 2003 and had been extended for an additional year, was due to expire in September 2006. The contract was put to tender in July and, at the end of the process, Ruder Finn, Inc. was selected to retain the contract as the JTB's public relations agency for The Americas (North, South & Central) effective February 1, 2007, for the three-year period up to January 31, 2010.

Likewise, in the United Kingdom, Financial Dynamics International was the Board's Public Relations Agency up to February 28, 2007, when their contract ended. In this case, however, the public relations agency review which was conducted by the JTB's Board resulted in the appointment of McCluskey International as the JTB's Public Relations Agency for the United Kingdom and Ireland, for the three-year period March 1, 2007 to February 28, 2010.

In both cases, the contract tendering and procurement procedures which began in July were conducted in accordance with the guidelines and regulations stipulated by the National Contracts Commission and the selected agencies received the final approval of that body as well as of Cabinet, as required.

It is the responsibility of the agencies to create strategies and execute creative programmes that will result in a positive re-imagining of Jamaica and increase general awareness of the country by promoting the full range of accommodations and niche activities Jamaica offers. The public relations agencies are also expected to reach traditional consumer and trade audiences as well as identifying and targeting new trend setting consumer segments. The objective is to increase the aspirational value of Jamaica in the eyes of the consumer by positioning the island as a unique, life-changing quality destination. Another important responsibility of the public relations agencies is to devise preventative maintenance strategies to offset any negative perception which could damage the Board's marketing campaign.

The public relations plan for 2006/2007 for The Americas was a continuation of Ruder Finn's winning campaign theme "**The Genius of Jamaica**". This was a competitive, aggressive marketing strategy that generated positive media coverage through uniquely Jamaica themes that had substance, news, public service and entertainment value. Designed to draw attention to unique attributes of Jamaica and the six resort areas, it tapped into current Jamaican and travel landscape, utilizing public relations, special events, promotions and marketing, to drive sales.

Press Releases, Press Trips and Promotions

During the period under review, Ruder Finn wrote and distributed more than 55 press releases and media alerts. Topics covered on-island festivals and events, trade shows and conferences, JTB appointments, product launches and marketing programmes, as well as awards and accolades.

They organized seven group press trips covering all 'Genius' areas and supporting JTB-sponsored events such as the Air Jamaica Jazz and Blues, Reggae Sumfest, JAPEX, JAMEX and Calabash Literary Festival. Outlets included:

MTV Radio, Billboard Magazine, Travel Agent, Travel Weekly, TravelAge West, Canadian Traveler, Corporate Meetings & Incentives, Odyssey Couleur

Seventeen Individual Press Trips were co-ordinated, including outlets such as:

US Airways, National Geographic Traveler, Telemundo, Black Family Channel, Relix Magazine, Triathlete Magazine, Golf Channel, Toronto Star, CNBC World Business, Palm Beach Media, Connecticut Magazine, WABC-TV, Real Golf Radio

More than 45 national and regional radio, online, television and retail promotions were arranged, partnering with Air Jamaica and on-island hotel / attraction partners. Outlets included:

- Retail: Friendly's, Bloomingdales, Tower Records, Baskin Robbins, Dunkin Donuts, Christopher Bean
- Broadcast: Wheel of Fortune, Comcast, Price is Right, KTLA-TV (LA), Q104.3-FM (NYC)
- Print: *Triathlete Magazine, Conde Nast, Manhattan Bride, Golf Digest*

More than 40 interviews were arranged for JTB and government officials, or affiliated spokespeople, with outlets including:

- *USA Today, New York Times, CNBC, WCBS, WNBC, WABC, News Channel 18 – Washington, D.C., NYC Public Radio*
- *Travel Weekly, Travel Agent, Successful Meetings, Recommend, Selling Power, Caribbean T&L, Consumer Digest, The Gleaner, Travelweek, Canadian Travel Press, GSA, Tourism Plus*

Passport Initiative: Jamaican Morning Coffee Breaks:

- Events were held in Chicago's Union Station, DC's Union Station, New York's Penn Station and Boston's South Station, to promote U.S. citizens to acquire their passport in response to the Western Hemisphere Travel Initiative

- Events included radio promotions in each market; trip giveaways courtesy of partners Sunset Jamaica Grande, Breezes and Air Jamaica; US Postal Service representatives were onsite to help process passport applications.
- 20 interviews were arranged for Ambassador Gordon Shirley
- Coverage of Coffee Breaks and Passport to Rewards ran in national media, as well as trade, local print and broadcast media
- More than 10,000 passport applications were placed directly in the hands of interested commuters during the four “Coffee Break Mornings”.
- Coverage of Jamaica’s campaign appeared in *USA Today*, *Wall Street Journal*, *Washington Post*, *Los Angeles Times*, *New York Daily News*, *Travel Weekly*, *Travel Agent* and *Recommend*, as well as many local and national television news programmes
- Total print, online and broadcast circulation totaled more than 8.6 million and strong coverage was ongoing.

Major Broadcast Initiatives

Golf Channel, “Golf with Style” – co-ordinated production of two destination golf features on Montego Bay and Ocho Rios, each of which aired eight times in October and November 2006, with a total of 23.7 million impressions.

Passport Programme;

- November 21, 2006 – Satellite Media Tour featuring Ambassador Gordon Shirley
- *WTTG Fox Morning News* (Washington DC) – November 15, 2006
- *WUSA 9 Eyewitness News at 6* – November 15
- *CBS Washington DC* – November 15
- *WUTB FOX5 News on My24* (Baltimore MD) – November 15
- NBC – Today Show, January 22 – Jamaica’s Passport to Rewards

CNBC – “World Business” – March 2, 16, 23 segments on Jamaica as a result of trip for producer Karen Isdahl covering Cricket World Cup, rum and coffee industries.

Industry Support

Ruder Finn supported JTB initiatives with press releases, promotions and media visits as well as interview support.

- PR Partners Meeting and Properties Workshop – April 2007
- JAPEX, JAMEX, Caribbean Week 2006

Jamaicans Overseas Support

- Monty Alexander Launches Concrete Jungle at BB Kings Blues Club in New York – April 2006
- Jamaican Consulate Clergy Luncheon in New York, April 2006 – Ruder Finn pitched and secured Diaspora media to attend; also pitched and secured religion writers to attend and made presentation about the Genius of Jamaica, including the JTB's efforts to reach the faith market
- Before the Legend: The Rise of Bob Marley – Reading and Book Signing, May 2006
- Reebok Grand Prix Meet Games at Icahn Stadium in New York, June 2006
- Diaspora Media Luncheon in New York, June 2006 – local Diaspora media were invited to attend a luncheon with the Minister of Tourism
- Prime Minister's Visit Reception in Washington DC, June – Assisted the Embassy of Jamaica in Washington in securing venue, preparing invitations and inviting media to attend.
- Penn Relays, April 2007 – created Jamaica brand presence at University of Pennsylvania Track and Field event. Supported Jamaica Team Bickle, full page ad in the Penn Relays souvenir Journal, organized signage inside stadium.

Ruder Finn's campaign presentation for the renewal of its contract was designed to elevate the successful **"The Genius of Jamaica"** campaign to the next level. In preparation for its presentation to the Selection Committee as part of the P.R. agency review process, Ruder Finn implemented elements of its proposed campaign, **"The Next Generation of Genius" (NextGen)**, as follows:

Select NextGen Placements/Highlights

NextGen Beauty

- *Milwaukee Journal Sentinel*, October 15 – “Flowing Beauty”
- *Caribbean Travel & Life*, September – “All in Good Time”
- *Skylights*, March / April 2007 – “What’s Happening in Jamaica, Mon”

NextGen Sports

- *The New York Times*, January 28 – “10 Point Caribbean Escapes Plan – for Golfers: Jamaica”
- *NBC –Sunday Today Show*, January 28 – “10 Point Caribbean Escapes Plan – for Golfers: Jamaica”

NextGen Hospitality

- *USA Today*, November – “One Stop Shops to Get Your Passport”
- *New York Daily News*, November 12 – “Here’s Your Passport to Jamaican Rewards”
- *Travel Weekly*, February 12, 2007 - :”Jamaica Officials: Trouble Spots are Far from Tourist Areas”
- *Travel & Leisure*, March 2007
- *The Wall Street Journal*, April 11, 2007 – “Frantic Hotel Development on Mellow island”

NextGen Literature

- *Odyssey Couleur*, March 2007 – “Words and Whimsy”

NextGen Cuisine

- *Bon Appétit*, May 2006, “For Steamy Days & Nights: Jamaica”
- *American Way*, February 2007 – “Main Course”

NextGen Bridal

- *Destination Weddings & Honeymoons*, Summer 2006 – “Spotlight Jamaica”
- *For the Bride*, April 2006 – “A Night in Jamaica”

NextGen Families

- *Newsweek International* – July 31, 2006 – “Travel Before the Baby”

In UK/Europe, Financial Dynamics Business Communications operated as the Board's P.R. agency for the major part of the year under review, under the theme "Jamaica, Take Another Look". This was an integrated communications strategy, the programme objectives being to:

- Raise visibility of the JTB
- Enhance consumer understanding
- Drive holiday bookings
- Change perceptions among opinion formers
- Boost innovation and yield from tourism
- Raise the profile of Jamaica among trade professionals

The programme structure for the period under review was based on a three-pronged approach, (as listed hereunder) each targeting a different audience.

- **Consumer and Private Sector Programme** - an issue-driven, mass market programme which arrested consumer interest in choosing Jamaica. In addition to raising visibility of Jamaica in the news, it also drove holiday bookings.
- **Destination, Trade and MICE Programme** – this element enabled the JTB to leverage the media exposure and changed the way Jamaica was seen in the travel industry.
- **Opinion Former Programme** - aimed at long-term positive changes in perceptions of Jamaica – celebrating the culture, legacy and people which made the Jamaica brand so special. Not a mass-market campaign, this programme sought to engage with the Jamaican community and opinion formers and high level media and political influences across the UK.

Among the activities undertaken by Financial Dynamics, in conjunction with the Board's London office, were:

- P.R. support for the Chelsea Flower Show in May

- A newspaper promotion in Manchester, England around the England vs. Jamaica friendly cricket match of June 3
- UK Cricket Press Trip, June 27 – July 1, timed around the 4th Test Match, West Indies vs. India. Eight journalists participated, the objective being to expose journalists who were likely to cover the 2007 Cricket World cup event to the Jamaican offering, as well as to ensure that the messages about Jamaica in the UK market remained positive
- Irish Press trips in June and November, to allow journalists to experience Jamaica
- P.R./Marketing presentations in Limerick, Cork and Dublin, Ireland, culminating with a Jamaica briefing and press reception in Dublin hosted by the Minister of Tourism, Entertainment & Culture
- Facilitating various press trips/media personnel from Ireland, the UK soft Adventure market, those covering Cricket World Cup 2007
- Co-operation with the sales and advertising teams on TV, press, radio, direct mail and online programmes combined to reach the Diaspora communities, focusing on Jamaican, Irish, Pakistani and Indian

McCluskey International took over the P.R. mantle with effect from March 2007, the essence of their campaign being to encourage the UK visitor to “Discover Your Own Jamaica / Discover Yourself in Jamaica”. The objective was to drive new visitors and encourage repeat visits through a campaign targeting media, the Diaspora and other niches and influencers.

Among the first activities organized by McCluskey International was a Press/Media Reception at Lincoln’s Inn, London, on March 5, at which the Minister of Tourism Entertainment and Culture, Hon. Aloun N’Dombet-Assamba, updated the press on CWC 2007 preparations and tourism developments.

SALES

The Jamaica Tourist Board's advertising and public relations activities complement the work of its overseas regional offices and sales representatives who maintain close contact with industry partners, including tour operators, travel agents, airlines and the cruise industry. In so doing, the team developed a comprehensive mix of marketing initiatives such as familiarization tours, service calls on travel agents, destination product seminars, trade shows and in-house training seminars. Consumer promotions in department stores and malls, as well as through radio and newsprint, were also undertaken.

The established geographic regions that were notably targeted were:

- The Americas - USA, Canada, Latin America and the Caribbean
- Europe - UK, Germany, Italy, Spain, Holland, Netherlands, Austria, Switzerland, Belgium and Portugal; and Ireland (new) and
- Asia - Japan, India & China (new).

Marketing representation services were maintained in the following markets:

- Germany - fastforward-marketing (Gabi Romberg)
- Spain & Portugal - Sergat Espana (Marc Meister)
- Italy - Brian Hammond Associates
- Holland)
Netherlands) - Hans van Wamel/Color Travel
Belgium) Services
- Japan - Marketing Garden Ltd.
- Latin America - Global Marketing & Sales (Alex Pace)

MAJOR SALES ACTIVITIES:

- **Destination Product Launch/Promotional Blitzes/Seminars**

Events reaching over 3,912 travel agents in 72 cities in North America were convened during the period under review.

- **Familiarization/Fly-in Programme**

During the period under review, the Jamaica Tourist Board continued to promote the destination through familiarization trips for travel agents. In addition to JTB/Air Jamaica rotations, the Board once again organized **Meet-Us-In Montego Bay fam tours** to the island, where agents paid their way to Montego Bay and the entire ground portion was borne by the Board, (May – June 2006)

For the period being reported, over two hundred and seventy six (276) travel agents were escorted on nineteen (19) such trips. The feedback from the agents was very positive. They were excited about the many new properties that the destination now offered. Many later reported that they were now actively selling Jamaica as a result of the experiences they had on the fam trips.

In April 2006 (27-30), ten (10) Virtuoso agents from Florida and Atlanta were hosted on island.

American Express Centurion/Platinum Reservation Centres

A total of sixty (60) agents from all American Express Centurion/Platinum reservation centers were hosted on fam trips during the periods May 10-14, June 1-5, September 13-17 and November 2-6, 2006. Host hotels were Round Hill and Half Moon.

Approximately 1,405 reservation agents were updated on the product at training sessions termed 'Jamaica Day', during the period June 21-23, 2006, at centers in Salt Lake City, UT; El Segundo, CA; Los Angeles, CA and Phoenix, AZ; and August 9-September 11, at centers in Miami and Jacksonville, FL and Atlanta, GA.

THETRADESHOW

The Jamaica Tourist Board participated in the above, September 10-13, 2006, in Orlando, Florida. The event, organised by the American Society of Travel Agents (ASTA), has replaced the World Travel Congress event, previously hosted by that organisation. In future, THETRADESHOW will have a consistent date and venue – always the second week of September and alternating between Orlando and Las Vegas. The JTB secured a booth and partnered with hoteliers, Air Jamaica and Air Jamaica Vacations to showcase the destination. The organisers reported an attendance of over 3,440 Buyers, 1,327 Suppliers and 147 Media.

Caribbean Marketplace 2007

This event in which the JTB participated, was held January 14-16, 2007 in Oranjestad, Aruba. CHA reported that the event featured a sold-out business floor and listed among its delegates, eighteen (18) new buyer companies from Canada, Germany, Italy, Jamaica, Sweden, United Kingdom and the United States. There was an increased presence from markets such as Mexico, The Netherlands and Venezuela.

Western Hemisphere Travel Initiative

In conjunction with Ruder Finn, a programme to educate the American public with respect to the requirement by the US Government for all US citizens to have a Passport by January 1, 2007, in order to re-enter the country was organised, whereby the JTB hosted 'Jamaican Morning Coffee Breaks' in major commuter terminals across the United States.

The reports received were that the initiatives held in the following locations were very successful.

- November 14, 2006 - Union Station, Chicago, IL
- November 15, 2006 - Penn Station, New York City, NY
- November 15, 2006 - Union Station, Washington, DC
- January 23, 2007 - South Station, Boston, MA.

Among the major consumer events in which the Board's regional offices participated were the following:

Northeast USA

Trade Shows/Blitzes/promotional Events

- CTO Caribbean Week, NYC – this annual week-long affair features a series of events, including The Caribbean Fair, Library Fair and town Hall Meeting, culminating with a grand Gala Event. It was estimated that approximately 10,000 consumers attended this event
- Sandals & Beaches Travel Shows (3 cities)
- Funjet Vacations Trade Shows
- Apple Vacations Trade Shows (6 cities)
- Travel Impressions Trade Show/Dinner (7cities)
- Adventures In Travel Expo, New York, NY
- The New York Times Travel Show, New York, NY (20,000 Trade/Consumers)
- TNT Vacations Product Launch (6 cities)
- AAA Travel Expo (3 cities)

Consumer Shows

- Philadelphia Enquirer/Daily News Travel Show, Philadelphia, PA
- Beneath The Sea Dive Expo, Secaucus, NJ
- John Hancock Boston Marathon, Boston, MA
- Chukka Adventure Tours Launch, New York City
- Kips Bay Boys & Girls Club Charity Golf Event, Long Island, NY

Southern USA

Trade Shows/Blitzes/Promotional Events

- Agent @Home Trade Show (4 cities)
- Vero Beach Travel Professionals Show, Vero Beach, FL
- Apple Vacations Spring Presentations
- Travel Impressions Trade Show, Ft. Lauderdale, FL; Tampa, FL; New Orleans. LA; Charlotte, NC; Atlanta, GA.
- Travel Professional of Color Conference ,Miami, FL.
- Jensen Beach Travel Expo, Jensen Beach, FL.
- Trip Tailor 2007 Product Launch, Ft. Lauderdale, FL.

Consumer Shows

- Miami Carnival, Miami, FL
- Caribbean Day at Broward Community College, Ft. Lauderdale, FL
- Affinity Travel Bridal Show, Baton Rouge. LA
- Mann Travel & Cruises Show, Charlotte, NC
- DEMA Annual Show, Orlando, FL
- Young Presidents Organization Conference, Miami Beach, FL
- Port Royal Jamaica Exhibition, Miami, FL
- Reggae Jerk Jam Festival, Tampa, FL

Midwest USA

Trade Shows/Blitzes/Promotional Events

- Michigan ASTA Trade Show, Farmington Hills, MI
- MLT Vacations Product Launch, Minneapolis, MN
- Apple Vacations Trade Shows (7 cities)
- Funjet Vacations Product Launch (6 cities)
- JTB Suite Jamaica Presentation (7 cities)
- Travel Impressions Trade Shows (3 cities)
- Minnesota Travel Show, Minneapolis, MN
- Trip Taylor 2007 Product Launch, Chicago IL
- JTB Pizza Seminars (8 cities)
- JTB Blue Mountain Coffee Seminars (Kansas City, KS)

Consumer Shows

- Kansas City Wedding Magazine Bridal Show
- Breton Village Mall Travel Show, Grand Rapids, MI
- Jamaica Week with Central Travel (6 agencies)
- Ya Maka My Weekend festival, Rock Island, IL
- Jamaica Independence Celebrations, Chicago, IL and Minneapolis, MN
- Our World Underwater, Rosemont, IL
- Germantown Travel Consumer Show, Germantown, WI
- St. Louis Bridal Show, St. Louis, MO

West/South West USA

Trade Shows/Blitzes/Promotional Events

- Agent@Home Shows
- Sandals & Beaches Ultra Selling Convention, Manhattan beach, CA
- GoGo Tours Caribbean Carnival, Aurora, CA
- Travel Impressions Trade Shows (5 cities)
- Apple Vacations 2007 Winter Sun Trade Show, Sacramento, CA
- Funjet/Trans Global Vacations Supplier Showcase, Denver, CO
- Home Based Agent Honeymoon Romantic Getaways Show, San Jose, CA
- Trip Taylor 2007 Product Launch, Dallas, TX and Costa Mesa, CA
- Apple Vacations Product Launch (4 cities)
- Air Jamaica Vacations Product launch, Newport Beach, CA
- Prestige Travel Jamaica Evening, Las Vegas, NV

Consumer Shows

- Houston Bridal Extravaganza, Houston TX
- Jamaica Association Houston Independence Gala, Houston, TX
- Summerset Festival Caribbean Showcase, Littleton, CO
- Jamaica Cultural Alliance Dinner/Dance, Los Angeles, CA
- Citiworld Travel – Cricket Promotion, Orange County, CA
- Prestige American Express Travel Show, Las Vegas, NV
- Orange County Travel Show, Seattle, WA
- Seattle travel Show, Seattle, WA
- UCLA Travel Fair, Los Angeles, CA

Latin America

The primary goal of the Jamaica Tourist Board-Latin America Division is to identify target markets in that region favourable to business growth and to work with tour operators and other tourism interests to promote Jamaica and generate tourism arrivals to the island.

The **Primary** markets are Mexico, Colombia, Chile and Venezuela

The **Secondary** ones are Argentina, Brazil, Peru, Panama and Costa Rica.

Major activities for the period under review included:

Trade Shows/Seminars/Fam Trips

- La Cumbre, Las Vegas, NV
- ARLAG Trade Show, Mexico
- Expo Boletin Trade Show, Mexico City
- JTB Seminar, Guadalajara, Mexico
- JTB Breakfast Seminar, Mexico City
- JTB Luncheon Seminar, Bogota, Colombia and Buenos Aires, Argentina
- JTB Latin America Fam Trip.

Other marketing tools used by the Board's Latin America representative to promote Jamaica were sales calls, telemarketing and e-mail campaigns.

CANADA

Consumer Shows

- Folklarama, Winnipeg: 20,000 consumers
- Midnight Madness, Oakville, Ontario: 15,000 consumers
- Travel & Leisure Show, Toronto: 40,000 consumers
- Toronto Golf Show, Toronto: 20,000 consumers
- Travel & Vacation Show, Ottawa: 10,000 consumers
- Liquor Store Promotions, Toronto: 40,000 consumers
- Let's Get Married Bridal Show, Montreal: 30,000 consumers
- Bob Marley Day, Toronto: 35,000 consumers

Jamaican Community Events

- Jamaica Consumer Evenings with Travel Agents: 4,000 consumers
- Carissauga Caribbean Festival with National Council of Jamaicans: Toronto: 8,000 consumers
- Women for P.A.C.E. – Annual Strawberry Tea: 350 consumers
- Jamaica Canadian Association of Hamilton – Summer Fair: 2,000 consumers
- Jamaica Day in the Park, Toronto & Montreal: 1,200 consumers
- Jamaica Independence Celebrations – Nationwide: 10,000 consumers
- Jamaica Night @ Barangas Hamilton, Ontario: 400 consumers

UK/EUROPE

During the period under review the Jamaica Tourist Board was actively involved in consumer and trade shows which included ITB Berlin and World Travel Market in London, arguably two (2) of the world's largest trade shows. Another major activity which drew interest from this market was the promotion of Cricket World Cup 2007.

Through its Public Relations Agency, the JTB continued to work closely with the Jamaica Diaspora in the United Kingdom, utilising various media opportunities.

During 2006/07, the JTB's UK and European offices undertook and/or participated in the following, among other activities:

Trade Shows/Blitzes/Promotional Events

- Virgin Atlantic Inaugural Flight
- British Bird watching Fair – Rutland
- Sales Blitz – Ireland: visiting Cork, Dublin, Galway and Limerick
- CTO UK Chapter Travel Agents Conference – Birmingham
- Premier Holidays Travel Fair – Newmarket
- Association of National Tourist Office Reps. (ANTOR) – meet the media reception/workshop
- Irish Travel Agents Association (ITAA) Gala and Conference in Dublin

- European Incentive and Business Travel and Meetings expo (EIBTM) – Barcelona
- Reisliv, Lillestorm – Oslo, Norway
- Northern Ireland Sales Blitz
- MATKA – Helsinki, Finland
- Holiday World – Belfast Northern Ireland
- FERIE – Copenhagen, Denmark
- Brunlea Travel Fair – Lancashire
- Walkerswood Travel Agents Evening to launch Jerk Country Tour – London
- JTB and Air Jamaica Community Event in Bristol
- Mini Sales Blitz – JTB sales team along with some of its UK travel partners visited travel agents in Burgess Hill, Horsham, Brighton and Hove, followed by an after work agent evening
- Scandinavian Tour Operator Familiarisation tour
- Jamaica Travel Specialist Familiarisation tour (Northern & Southern Region agents)
- Jamaica National Diaspora events in Birmingham and London
- Planned UK and Ireland promotional tour with Ambassador Courtney Walsh, Jamaica Local Organising Committee for Cricket World Cup 2007, and Air Jamaica
- Cricket World Cup 2007 Press/Consumer Promotional events in London, Dublin, Belfast and Birmingham.

In-house Training/Presentations

Reservations and customer service staff training were conducted at the following Tour Operators:

- Global Travel, Chester
- MYTRAVEL , Newcastle
- Seasons in Style, Chester
- Thomas Cook, Peterborough
- ITC, Chester
- Trailfinders, Leeds – training approximately 30 reservation staff on the Jamaican product
- Azure, Chester – a high end tour operator who currently sells Half Moon, Round Hill and Jamaica Inn. Approximately 12 reservation staff members were trained on the Jamaican product
- Airtours – 140 reservation staff were trained on the Jamaican product.

GROUPS AND CONVENTIONS

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

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

Target markets are :

Primary : Incentive Travel and Corporate meetings

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

Some of the major activities undertaken by the department for the period under review were:

National Coalition of Black Meeting Planners (NCBMP)

An annual Spring event for African American planners and NCBMP members was held in Louisville, KY from May 8-14, 2006 with 1200 planners/members in attendance.

IMEX Frankfurt

The essential worldwide exhibition for meetings and incentive travel, this event, held May 31 – June 1, brought together approximately 3,300 exhibitors from 150 countries and 3,400 hosted buyers from 57 world markets.

Annual Jamaica Product Exchange (JAMEX 2006)

The 8th annual event was held in Westmoreland at Sandals Whitehouse from June 7-11 and at Grand Lido Braco, Trelawney, from June 14 – 18, 2006. This annual event was co-sponsored with meeting magazines and targeted meeting/incentive buyers globally from all market segments. There were 100 planners in attendance.

Incentive Travel & Motivation Expo (Show) IT&ME

The largest international event for the incentive professionals was held in Chicago, Illinois during the period September 26-28, 2006. Approximately 12000 buyers were in attendance.

European Incentive & Business Travel management (EIBTM)

Europe's largest incentive, business travel and meetings trade fair, was held in Barcelona, Spain, from November 28-30, with an attendance of 2000 meeting professionals.

PERFORMANCE IN THE MARKETPLACE

OVERVIEW

Total stopover arrivals of 1,678,905 saw an increase of 13.5% over 2005. This resulted in Jamaica ending the year 2006 with a best ever performance. For every month of 2006, there was record number of stopover arrivals visiting our shores. During the Winter period (January-April) there was an increase of 20.6% growth in arrivals. With the exception of March which increased by 8%, all other months recorded double digit increases.

For the first time in any summer period (May-December) stopover arrivals surpassed the one million mark with 1,079,071, an increase of 12.4% over the 960,116 recorded for summer 2005.

This impressive increase in arrivals can be contributed to several factors. With the absence of Cancun in the market place due to hurricane damage, Jamaica was well positioned to reap significant benefits from the diversion of business to other destinations. There were additional air seats from new airlines as well as from expansion into new routes by existing carriers.

Another factor driving this increase was the coming on stream of new inventory in hotel rooms during the latter half of 2005, thus creating an available supply of new product offerings to match the demand created from the Cancun fallout. Note should also be taken that it was one of the quietest hurricane seasons in years.

UNITED STATES

The U.S. market again recorded over a million visitors during 2006. Total visitors from this market increased by 12.5%, with 1,190,721 visitors compared to the 1,058,317 recorded in 2005. This gave it a 70.9% market share. The Northeastern and Southern states contributed 72.9% of the US visitors to Jamaica during the period under review.

For the winter period (January-April) the US market provided a total of 428,159 stopover arrivals, which was 16.9% above the corresponding period of 2005. All of the USA marketing regions recorded double digit increases, the South having an impressive 33.4%, the West 25.8%, the Midwest 11.7% and the Northeast by 10.7%.

For the summer period (May-December), the US market recorded an increase of 10.2% with a total of 762,562 stopovers, up from 692,085 in 2005. All marketing regions recorded positive growth. The Northeast with 318,921 increased by 8.3%, the Southern region with 258,467 grew by 15.4%, Midwest with 122,178, an increase of 5.5% and the West with 62,996, an increase of 9.2%.

South

The South recorded the highest level of increase of stopover arrivals of 20.2%, moving from 305,458 in 2005 to 367,050 in 2006, an addition of 61,592 stopover arrivals.

Northeast

The main producing region for the US market grew by 9.1%. In 2005 there were 459,015 stopover arrivals while there were 500,925 in 2006, an increase of 41,910.

Midwest

This region grew by some 17,841 additional visitors or 8.3%, moving from 213,785 in 2005 to 231,626 in 2006.

West

During 2006 91,120 visitors came to Jamaica from the West Coast compared to 80,059 in 2005, an additional number of 11,061 or 13.8% increase.

CANADA

It was an incredibly good year for the Canadian market in 2006 as arrivals to Jamaica increased by 31.4%, with a total of 153,569 stopovers, 36,707 more than 2005. This increased its market share to 9.1%.

The Canadian market enjoyed a very strong winter period (January-April), growing by 24.8%. There was a total of 67,621 stopovers for the period compared with 54,195 in winter 2005. For the summer (May-December), there was an increase of 37.2%, with a total of 85,948 stopovers compared to the 62,667 arrivals in summer of 2005.

The main province of Ontario contributed 108,281 or 70.5% of stopover arrivals to the Canadian total, an increase of 31/3% over the 82,460 who came from that province in 2005. Quebec, the second leading province, grew by 29.9% to reach 20,496 stopovers. All of the other four leading provinces grew by double digits – Alberta - 31.4%, British Columbia - 22.7%, Nova Scotia - 60.6% and Manitoba – 29.1%.

UNITED KINGDOM/EUROPE

Stopover arrivals to Jamaica out of the European region returned to positive growth following a slowdown during 2005. Arrivals from Europe increased by 9.5% in 2006, moving from 233,925 in 2005 to 256,074 in 2006. In 2004, Europe's share of the market represented 17.1%; this share has declined to 15.3% in 2006. The United Kingdom, Germany and Italy are the most important countries in this regional market.

The following countries showed growth in the January to December period over the corresponding period for 2005:

- Denmark 100.2%
- Portugal 82.8%
- Czech Republic 55.1%
- Luxemburg 39.6%
- Netherlands 18.8%
- Ireland 13.1%

LATIN AMERICA

After five years of decline in stopover arrivals out of the above market region, stopover arrivals from this region increased by 3.7%, moving from 8,428 in 2005 to 11,101 in 2006, or 0.7% market share. Apart from Ecuador which recorded a decline of 25.1%, all the main visitor producing countries of the South American sub-region recorded increases. Brazil with 1,471 visitors increased by 49.8%; Argentina with 993 up by 62%; Venezuela with 992 up by 7% and Colombia with 981 up by 87.6%.

As it relates to the Central American sub-region, all the major producing countries recorded increases. Mexico with 2,167 increased by 30.2%; Belize with 641 up by 23.3%; Costa Rica with 639 up by 10.4% and Guatemala with 344 up by 27.9%.

With the increased investment by Spanish hotel chains in new hotel rooms, the performance from the Latin American market is expected to continue in this positive trend.

CARIBBEAN

Arrivals from other Caribbean territories to Jamaica increased by 11.4%, with 55,948 visitors in 2006 when compared to 2005, a market share of 3.3%.

The Cayman Islands with 16,901 stopovers, Trinidad and Tobago with 8,382, Barbados with 6,078 and the Bahamas with 3,606, continued to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 34,967 stopovers or 62.5% of the total Caribbean arrivals.

JAPAN

The Japanese market with 3,755 visitors declined by 12.8% when compared to the 4,304 stopovers in 2005. This market is still struggling to regain its luster experienced in the 1990's.

NEW MARKETS

China

Jamaica has been represented in China by China Business Network (CBN), led by Mr. Adam Wu, since November 2005, with the mandate to implement and maintain the visitjamaica website on the China Wide Web and to provide related sales and marketing services in China.

During the year 2006, attempts were made by the Jamaica Tourist Board to capture the attention of Chinese travelers and to strengthen its presence in the Chinese tourist market through participation in the World Travel Fair in Shanghai from March 30 to April 2 and the Beijing International Travel and Tourism Market (BITTM) from April 2 – 5.

It was the first time that Jamaica participated in the Shanghai trade fair and the second time at BITTM, since the island was granted '**Approved Destination Status**' from China in February 2005. Whilst participating in the two trade shows, Jamaica received coverage through the influential China Central TV (CCTV). Following the shows, journalists from CCTV, Beijing TV and Radio Beijing came to Jamaica to develop features and programmes on the island for broadcast in China.

Since then, a number of issues have been addressed in order to prepare the island to receive visitors from China and to expand the Asian market. Among them was the establishment of approved tour operators in Jamaica who will work in concert with approved tour operators in China to formalize the commercial arrangements. Visas, air access, and language were among other issues which continued to receive attention.

The Chinese version of the Jamaica Tourist Board's website was launched at a reception held at the Shangri-La Hotel in Beijing, China. The website, which is written in mandarin, was developed by China Business Network and may be accessed at www.visitjamaica.com.cn or on the language bar at the top of the JTB's www.visitjamaica.com website. Jamaica is the first and only English-speaking Caribbean country to have a website for Chinese travelers. Collateral materials in mandarin were also developed.

India

In 2006, the Jamaica Tourist Board sought to actively pursue the Indian market, resulting in the retention of the services of a public relations and marketing firm to promote the island's tourism in that country, with effect from May 31, 2006. This agency - TRAC Representation (India) Private Limited - has an impressive record of marketing and promoting other destinations to the Indian traveler.

Research showed that India has a solid middle class which could justify our entry into that market. Information supplied by TRAC revealed that approximately 250 million middle class persons and more than 70,000 millionaires reside in India. According to the agency, it was expected that India could become the world's youngest nation with an average population age 25-26 years, a likely market for soft adventure travel.

Air access, a critical consideration to Jamaica's foray into any new market, was available through options such as British Airways, Virgin Atlantic, Air India and Delta Airline, which connect to the UK and the USA, allowing persons to fly from these locations to Jamaica. The recent addition of a Delhi to Chicago route by American Airlines provided another connection which could serve Jamaica's tourist industry well.

Ireland

Being cognizant of the fact that the outbound market from both the Irish Republic and the province of Northern Ireland has been growing rapidly over the last decade, the JTB stepped up its promotional activity in Ireland through its regional office in the United Kingdom. A sales blitz was done with Irish tour operators in Belfast and Dublin and advertisement and advertorials were placed in the main travel and consumer publications. The London office also participated in consumer and trade exhibitions in the Republic of Ireland and Northern Ireland and conducted tour operator training sessions in Dublin and Cork.

Other initiatives saw fifteen Irish travel agents and reservation staff participating in an educational visit to Montego Bay and Ocho Rios while official travel agents for the 2007 Cricket World Cup took part in a familiarisation tour in May to observe the island's preparations for the games. In June, an eight-member delegation from the media fraternity in Ireland visited Jamaica to participate in a familiarization tour of the island. With a combined circulation of more than 550,000 readers, the publications represented were the Irish Times, Sunday Independent, Travel Extra, Business Travel, Abroad Magazine, Evening Herald and Northern island News.

JAMAICA

MARKETING DEPARTMENT

The above department is responsible for on-island marketing and communication programmes and supports the initiatives of the overseas sales offices, public relations and advertising agencies in promoting Jamaica's tourism interest.

The following units fall within the department:

- **Destination Marketing**
- **Marketing Communication**
- **Promotions & Events**
- **Library**
- **Website & E-Commerce**
- **Tourism Awareness**
- **Research & Market Intelligence**

The Destination Marketing Unit

The Destination Marketing Unit has the responsibility for planning, directing and overseeing the development, implementation and evaluation of the overall marketing strategies in partnership with the tourism industry stakeholders and suppliers.

The unit is also responsible for formulating marketing plans and strategies by keeping abreast of the economy, trends and competition within the region. These objectives are achieved by the creation of joint marketing activities that enhance the image and perception of the Jamaica Brand.

During the period under review, the unit

- provided on-island support for overseas press groups (print and electronic) radio remotes, trade shows, international events (including sporting activities) conferences and festivals.
- was involved with organizing radio remotes whereby overseas radio stations broadcast live from Jamaica to their respective audiences who were fed images of the activities in the lush sunshine of Jamaica, especially during the winter months.

Marketing Communications Unit

The main role of this unit is to ensure “above the line marketing strategies”, that is, activities that deal with public relations and advertising. The unit also has the significant responsibility of ensuring public relations support in the local and international media for the efforts and initiatives of the Board on a corporate and product level.

Through its **media section**, the unit maintained constant communication with the local media to provide information on developments within the industry and initiatives to market the destination. The unit produced features, publications, articles and speeches as required for all tourism officials and arranged interviews and press conferences as needed.

Set out hereunder are some of the activities undertaken by the unit during the period under review:

- sought media opportunities for JTB spokespersons
- planned and implemented PR support for JTB sponsored events
- linked with overseas agencies to share information for publicity purposes
- worked actively with all other agencies involved in the planning of ICC CWC 2007. The services of Ambassador Courtney Walsh were secured to assist the marketing team in promoting the island in many of the cricket playing nations and in communities of Jamaicans abroad.

Additionally, the JTB worked with the Local Organising Committee to develop programmes for the overseas media while they were on island for the tournament.

Promotions & Events Unit

The Promotions and Events programme is an integral part of the JTB's major marketing strategy which has been very successful. The unit is charged with co-ordinating a programme of events, through endorsement, promotional support, P.R./press coverage, etc, which will achieve the following objectives:

- increase tourist arrivals especially in traditionally low periods
- enhance the image of the destination by linking it through events with activities, personalities and brands that have prestige in the marketplace
- increase exposure to Jamaica in the marketplace through media (advertising and publicity)
- gain or maintain a competitive advantage in certain market segments

Strategies Used In Achieving Objectives

- developed a comprehensive 'Calendar of Events' which provided useful information on activities and events taking place in Jamaica
- researched and supported promotional events that were in line with programme objective, focus and budget
- gave support to the activities being staged in key international markets to ensure local components were reflected in these events

- established and maintained working relationships with tourism partners, representatives of overseas agencies, private sector and related organisations
- reviewed proposals for new events and provided support as appropriate to ensure objective assessment of proposals.

Among the **major events** with which the department was involved during the period under review were:

- Calabash International Literary Arts Festival
- Caribbean Fashion Week
- Red Stripe Reggae Sunfest
- 43rd Port Antonio International Marlin Tournament
- Jamaica Cricket Festival of Stars
- Emancipation Jubilee
- Air Jamaica Jazz & Blues Festival
- Flashpoint Film Festival
- Reggae Marathon
- Jamaica Cricket Festival of Stars
- Ms. Global International Pageant
- Nyammins & Jammins Food Festival
- Denbigh Agricultural and Industrial Show 2006

Library

The objective of the Library is to meet the information needs of the organisation as well as to provide a resource to members of the public seeking information on tourism and tourism-related subjects. Great use is made of the Library by students at secondary and tertiary level who are doing research for various projects.

During 2006, in an effort to deliver current content to its users, the Library subscribed to EbscoHost's Hospitality and Tourism Complete Database. Hospitality & Tourism Complete covers scholarly research and industry news relating to all areas of hospitality and tourism. This collection contains more than

500,000 records, with coverage dating as far back as 1965. There is full text for more than 200 publications, including periodicals, company and country reports and books.

Great effort was also made to digitize relevant sources within the collection so as to provide more efficient access and enhance preservation of key items. One important collection which is now fully digitized is the annual report collection dating back from 1957.

Website /E-Commerce

The Jamaica Tourist Board's web marketing strategy aims to increase knowledge of Jamaica, the varied products and services offered on island and to update consumers quickly and effectively on activities occurring on the island. The JTB's website - www.visitjamaica.com - along with accompanying sites www.jamaicahomecoming.com and www.cruisejamaica.com aims to be the first point of reference for all things Jamaican.

With subsequent technological developments, plans were developed to redesign the current marketing website - www.visitjamaica.com - in order to increase the capabilities to communicate the depth and breadth of Jamaica. This new site, when launched, is expected to reflect Jamaica's Brand and incorporate a mixture of advertising and public relations campaigns worldwide. Not only will the new site capture the vibrancy and spirit of our people and destination, but it will, in fact, become the epicenter of information as the official travel site for Jamaica.

Additionally, in an effort to continue building relationships with industry partners and the public, to develop greater awareness of the activities of the Board and an interest in the organisation and its services, the JTB began the in-house creation and development of an extranet site intended to provide a wealth of information and resources on the JTB and the Jamaican tourist industry. Called the **Tourism Information Publishing Site (TIPS** for short) this site will be a one-stop site for

industry news and reports and will be accessible at www.jtbonline.org. **TIPS**, which will be launched during the next financial year, 2007/08, is expected to improve information delivery and service with the use of web-based technologies.

Tourism Awareness

The mandate of the small Tourism Awareness Unit is to improve the level of awareness amongst Jamaicans on the value of the tourist industry and its impact on our quality of life. It targets all sectors of the society, including educational institutions, communities, private and public sectors, tourist industry, media and the general public.

During the period under review, the unit continued its involvement in the usual tourism awareness activities, including presentations, exhibits and lectures in the school and general communities. The school community continued to actively participate in the eight major competitions hosted through the unit. These competitions have proven to be very effective in getting students to familiarize themselves with current tourism issues.

The **Tourism Action Clubs** continued to grow during this period, with the highlight activity for the clubs being the major Tourism Action Club Conference held as part of the annual Tourism Awareness Week celebrations in September. A training workshop was also held for the Tourism Action Club staff advisors to improve their ability to run the clubs effectively and efficiently.

The unit, with the support of the **Scholarship Committee** commissioned by the Board of Directors, was able to review and update the scholarships awarded by the JTB to make them more relevant to the needs of today's students. The Board made a decision to offer a scholarship annually and also increased the funds attached to the scholarship.

For this period, Miss Ingrid Boyd was selected as The John Pringle Scholar. She is expected to pursue her Bachelors degree in Hospitality and Tourism Management at the Munroe College in New York.

Research & Marketing Intelligence

The objective of the Research & Marketing Intelligence unit is to provide statistical data to inform and facilitate strategic management, planning and decision making as well as to assess the visitors' level of satisfaction with their trip and to gather market information. This unit produces an "Annual Travel Statistics" document, relevant sections of which are included in this report.

REGIONAL OFFICES

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

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

AWARDS AND RECOGNITION

During the year under review, Jamaica again cornered the market with the following tourism awards at the 13th annual World Travel Awards 2006, held at Providenciales, Turks and Caicos Islands:

- **Caribbean's Leading Destination**
- **Caribbean's Leading Tourist & Convention Bureau**
- **World's Leading Cruise destination**
- **Caribbean's Leading Cruise Destination**

It was the first time in the history of the awards that Jamaica was voted **World's Leading Cruise destination**, an honour that solidified Jamaica's position as a major player in the world cruise business.

In addition to the foregoing, Jamaica also emerged winner in the Caribbean Travel & Life's annual *Best of the Caribbean* Survey by topping three of the major categories – '**Best All-Around Destination**', '**Friendliest People**', and '**Best Local Food**'.

In Canada, the JTB was selected by Canadian travel agents as the **Best Tourist Board**, edging out the Mexico Tourist Board in the Canadian Travel Press/Travel Courier Agents' Choice Awards survey. Canadian Travel Press and Travel Courier are two of Canada's largest tourism trade publications. This award is given to the tourist board which accumulated the most votes from the 2,930 travel agents who participated in the seventh annual Agents' Choice Awards survey.

PRODUCT/LICENSING

Although Product-related matters are under the portfolio responsibility of the Tourism Product Development Company Limited (TPDCo.), the Jamaica Tourist Board retains the responsibility for licensing of tourism entities, as required by the Tourist Board Act. In 2006/07, licences were approved for 2,683 entities as set out hereunder:

▪ Attractions	32
▪ Bike Rentals	08
▪ Car Rentals	54
▪ Craft Vendors	63
▪ Contract Carriage Operators	2,169
▪ Domestic Tour Operators	53
▪ Domestic Tour Con. Carriage	188
▪ Hotels	02
▪ Non Hotels	24
▪ Water Sports	<u>89</u>
	<u>2,683</u>

STATISTICS

According to the World Tourism Organization (WTO), tourism enjoyed another year of good growth. Preliminary results indicated that international tourist arrivals were expected to reach 842 million, an increase of 4.2% over 2005. This meant that tourism demand had been highly resilient, despite all the downside risks of terrorism, health scares and high oil prices which the industry faced at the beginning of 2006.

Growth was fairly steady throughout the year, travelers were stimulated to increase travel frequency with shorter stays and to visit new destinations. This was influenced by attractive prices for flights which were as a result of aggressive competition brought on by volatile aviation fuel prices as well as the expansion and spread of low-cost airlines. Tourist confidence might have been undermined by several events, but only resulted in temporary shifts in travel flows and did not stop people from travelling.

Caribbean

The Caribbean Tourist Organization (CTO) estimated that tourist arrivals to the region were on par with those for 2005, with a slight increase of 0.4% - 22.3 million.

In terms of major markets, it was estimated that tourist arrivals to the Caribbean from the United States increased by 1.8%, Europe declined by 1.7% and Canada increased by 1.3%.

The fortunes of the Islands varied widely with some achieving increased arrivals over 10% in 2006. These included Cayman Islands (+59.3%), Grenada (+20.6%), Jamaica (+13.5%) and Bermuda (+10.9%). The most visited islands were the Dominican Republic with 3.9%.

Visitor Arrivals To Jamaica

- Total stopover arrivals of 1,678,905, an increase of 13.5%
Foreign nationals of 1,578,207, represent an increase of 13.8%
Non-resident Jamaicans of 100,698, an increase of 9.9%
- Cruise passenger arrivals of 1,336,994 – an increase of 17.7%.

Stopovers

Jamaica ended the year 2006 with a best year ever performance. Total stopover arrivals was 1,678,905, a 13.5% increase over the 1,478,663 recorded in 2005. This means there were 200,242 more stopovers in 2006.

During the winter period (January-April), Jamaica recorded an increase of 20.6% growth in arrivals. With the exception of March which increased by 8%, all other months recorded double digit increases – January by 11.9%, February 12.5%

and April a remarkable 32.1%. Total stopover arrivals for the period were 599,834 compared to 518,547 for the 2005 winter.

For the first time in any summer period (May-December), stopover arrivals surpassed the one million mark, with 1,079,071, an increase of 12.4% over the 960,116 recorded for 2005. The first five months of summer (May-September) recorded double digit increases ranging from a low of 10.2% in September to a high of 20.8% in May. During the last three months (October-December) although there were increases, they were at a lower scale: October 7.9%, November 0.1% and December 1.9%.

This impressive increase in arrivals can be attributed to several factors. With the absence of Cancun in the market place due to hurricane damage, Jamaica was well positioned to reap significant benefits from the diversion of business to other destinations. Jamaica was successful in attracting additional air seats from new airlines, as well as from expansion into new routes by existing carriers. Some Charter operators expanded their operations by increasing the frequency of flights. Jamaica therefore became more accessible to new markets and existing ones.

Another contributory factor for the increase was the coming on stream of new inventory in hotel rooms during the latter half of 2005, creating an available supply of new product offerings to match the demand created from the Cancun fallout. Lastly, the Caribbean experienced one of the quietest hurricane seasons in years, allowing Jamaica to have a complete storm free year.

Cruise Passengers

For the fourth time in a row, Jamaica recorded over a million cruise passengers. This total of 1,336,994 cruise passengers who visited our shores was an increase over the 1,135,843 recorded for the corresponding period in 2005. In November 2006, the Port Authority of Jamaica signed a five year contract, valued

US\$16.5 million, with Royal Caribbean Cruise Limited (RCCL). This agreement guaranteed that RCCL will provide a minimum of 2.3 million cruise ship passengers over the next five years.

In June 2006, Freedom of the Seas, the world's largest and most modern cruise ship, made its inaugural call to the port of Montego Bay.

Seasonally, cruise arrivals increased by 8.8% in the Winter period with 515,376 cruise passengers, compared with 473,627 for 2005.

The port of Ocho Rios continued to provide the larger share of Jamaica's cruise arrivals as this port accounted for 840,923 or 62.9% of the 1,336,994 passengers. Montego Bay accounted for 485,325, a remarkable increase of 48.4% when compared with 2005.

The cruise ships carrying the most passengers to Jamaica in 2006 were **Conquest** of the Carnival Cruise Line and **Freedom of the Seas** of Royal Caribbean Cruise Line. The **Conquest** made 51 calls to Montego Bay and provided 168,137 passengers, while **Freedom of the Seas** made 30 calls with 120,618 passengers.

AVERAGE LENGTH OF STAY

The overall average intended length of stay for foreign nationals was 9.8 nights; this was at the same level recorded in 2005. Those visitors who stayed in hotel accommodation had an average length of stay of 6.9 nights and those who stayed in non-hotel accommodation stayed 16.1 nights.

American visitors, on the average, stayed 8.3 nights while Canadians stayed an average of 11.8 nights. Visitors from the United Kingdom recorded an average

length of stay of 17.2 nights and those from Continental Europe stayed 11.7 nights.

HOTEL ROOM OCCUPANCY

During 2006, the average rate of hotel room occupancy increased by 1.5%, moving from 61.9% in 2005 to 62.8% in 2006. Total room nights sold increased by 9.8% from 3,253,149 in 2005 to 3,572,199 in 2006.

Hotel room occupancy rate in Montego Bay was the same level for 2005 (63%.) The total number of room nights sold decreased by 1%, moving from 1,095,700 in 2005 to 1,085,144 in 2006.

Negril recorded an average hotel room occupancy rate of 64.1% compared to 65.3% in 2005. Room nights sold increased by less than 1% - 946,030 to the 943,355 sold in 2005.

Ocho Rios saw an increase of 4.8% in average hotel room occupancy; room nights sold increased by 37.9% - 797,542 in 2005 to 1,099,699 in 2006. This noticeable increase was as a result of the 730 room Sunset Jamaica Grande being fully operational after being closed for refurbishing, and the opening of the new 856 room hotel – RIU Ocho Rios.

Mandeville/South Coast average room occupancy declined by 1.5%, while room nights sold increased from 138,107 in 2005 to 144,316 in 2006.

VISITOR EXPENDITURE

Gross visitor expenditure in 2006 was estimated at US\$1,871 million. This represented an increase of 21.1% against the US\$1,545 million earned in 2005.

Total expenditure of Foreign Nationals amounted to US\$1,704 million, cruise passengers totaled US\$118 million, while US\$49 million was estimated as the contribution of non-resident Jamaicans.

Foreign Nationals spent an average of US\$110.64 per person per night while cruise passengers spent an average of US\$88.92 per person.

Direct Employment in the Accommodation Sector

The number of persons employed directly in the accommodation sub-sector increased from 31,227 in 2005 to 33,598 in 2006.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 29,434 persons or 87.6% of the total number of persons employed directly in the sub-sector. Montego Bay with 10,426 direct jobs represented 31% of those employed, Ocho Rios with 9,874, accounted for 29.4% and Negril with 9,134, was responsible for 27.2%.

NEW DEVELOPMENTS

Accommodations

- In November 2006, the first phase of 1,900 room Bahia Principe at Pear Tree in St. Ann opened with 549 rooms.
- Construction began on the first of three Ibero Star properties at Rose Hall, Montego Bay which is scheduled to be opened in May 2007 with 360 rooms.

(See Tables taken from the Jamaica Tourist Board's Annual Travel Statistics for 2006 on the following pages