

JAMAICA

MINISTRY OF TOURISM

STRATEGIC PLAN
MTF 2021-2025



TOURISM STRATEGIC PLAN 2021-2025 “Bouncing Back, Reimagining, Building Forward Stronger”



MINISTRY OF TOURISM

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"Bouncing Back, Reimagining and
Bouncing Forward Stronger"

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LIST OF ABBREVIATIONS

Community Tourism Enterprise	CTE
Global Centre for Tourism Resilience and Crisis Management	GCTRCM
Jamaica Centre of Tourism Innovation	JCTI
Jamaica Hotel & Tourist Association	JHTA
Jamaica Tourist Board	JTB
Jamaica Vacations Limited	JAMVAC
Medium Term Socio-Economic Policy Framework	MTF
Ministry of Finance and the Public Service	MFPS
Ministry of Tourism	MT
Pacific Asia Travel Association	PATA
Statistical Institute of Jamaica	STATIN
Tourism Enhancement Fund	TEF
Tourism Product Development Company Limited	TPDCo
United Nations Educational, Scientific and Cultural Organization	UNESCO
United Nations World Tourism Organization	UNWTO
World Travel and Tourism Council	WTTC

MESSAGE FROM THE MINISTER OF TOURISM



The tourism sector, like many other sectors, was devastated by the novel coronavirus pandemic, which led to the closure of Jamaica's borders to international travel in March 2020. This resulted in the shuttering of tourism establishments, including hotels, villas, attractions, shopping malls and ground transportation.

We therefore had to be creative in order to guarantee that our industry survived, by developing world-class health and safety protocols and establishing our ground-breaking resilient corridors. Additionally, we have taken calculated steps to ensure the tourism sector thrives in the post-COVID-19 era. Key to this, is the development of the strategic framework for re-imagining Jamaica's tourism, which is guided by the Blue Ocean Strategy. It will allow us to meet our growth targets of five million visitors, five billion dollars in earnings and five thousand new rooms by 2025.

A Blue Ocean Strategy calls for the creation of business models that depart from traditional models based on competition and standardisation. It will see Jamaica's Ministry of Tourism pursuing enhanced value creation, through product differentiation and diversification, which will allow our destination to open up new markets and create new demand in a unique and uncontested space.

Over the long term, a vital component of the Blue Ocean Strategy will be to strengthen the systems for tourism zoning and theming, so that the unique characteristics of each Destination Area will be preserved and enhanced to support their own distinct brand appeal.

Re-imagining Jamaica's tourism will identify and establish innovative policies, systems, protocols, and standards that assure our visitors a safer, secure, and seamless experience, while building out a new national tourism model based on a diversified portfolio of unique and authentic attractions and activities, which draw heavily on Jamaica's natural and cultural assets.

The marketing and promotional challenges created by the pandemic have provided an opportunity for recalibration and reengineering of strategies that were already in motion. Indeed, COVID-19 presents an opportunity to 'Build Forward Stronger' through the application of the Blue Ocean Strategy, so that we can: attract a diverse set of visitors who want a uniquely Jamaican experience; leverage local linkages for the supplies and tourism experiences; and build a future that is even more resilient, safe and sustainable.

Re-imagining our tourism sector to build forward stronger can only be achieved by focusing on building strong local capacity with a relentless focus on quality. We must stabilise the industry while creating an incubator for more inclusive enterprises and also focus on building a strong enabling environment.

I am very proud of my team at the Ministry of Tourism for quickly developing this strategy, which will lay the foundation for the emergence of a new, more inclusive form of tourism. By applying the Blue Ocean Strategy to reset tourism, I am confident that the sector will, within the first two to three years, return to its pre-COVID-19 performance with arrivals and economic returns.

We will therefore continue to press forward with a spirit of hope for a brighter future, which is prosperous for every Jamaican.

Hon. Edmund Bartlett, CD, MP
Minister of Tourism



CHAPTER 1: EXECUTIVE SUMMARY

Jamaica has several world-class golf courses and good sporting and entertainment venues. The destination has often hosted major international events. Sports and entertainment will be an increasingly important part of the destination's offering of activities under the new business model.

EXECUTIVE SUMMARY

This plan outlines the strategic framework for tourism for the next 10 years. The plan will be implemented in three phases described as “Bouncing Back”, “Re-imagining” and “Building Forward Stronger”. Phases one and two, which cover the fiscal years between 2021 and 2025, fall within the government’s MTF and represent the short-and-medium-term of the plan. Phase three, which covers the period between 2026 and 2030, represents the long term when Jamaica will be transformed into the world's preferred warm-weather destination.

The plan is complete with a comprehensive and integrated suite of goals, outcomes, objectives, strategies, and actions designed to quickly return Jamaica’s tourism sector to its pre-COVID-19 performance and to implement a new business model where competitive advantage is derived from differentiation.

The plan has five **goals** as follows:

1. Make the tourism sector more resilient to future shocks, whether they be human or natural in origin;
2. Make the tourism environment sustainable according to the triple bottom line;
3. Offer visitors an unmatched value proposition based on innovative, diversified and differentiated tourism products;
4. Return the tourism sector to a growth trajectory by attracting a wider and more balanced range of high-quality investments in accommodation, attractions, and activities;.

5. Move local businesses up the tourism value chain to reduce leakages and support more inclusive social and economic development. Translating this into performance metrics, the Ministry sets the following targets for the MTF: five million visitor arrivals annually, five billion dollars in earning annually, and five thousand new rooms added to the stock by 2025.

The plan has four strategic components that are used to develop a Strategy Map to link the Strategic Objectives to the Sector Goals.

1. **Demand Measures.** Demand relates to the needs, wants, and expectations of visitors, especially those of Generation-COVID (GEN-C) tourists.
2. **Supply Measures.** Supply relates to the availability of suitable accommodation, attractions, activities, amenities, access, and ancillary services.
3. **Institutional and Governance Measures.** Institutions and governance relate to efficient and effective coordination, collaboration and cooperation among key stakeholders that assures a resilient, sustainable, and competitive tourism sector.
4. **Human Capital Measures.** Human capital represents the economic value of the sector's employees' set of knowledge, habits, competences, motivation, enthusiasm and other personality attributes.

The plan is based on a robust methodology and carefully crafted three-part framework which is set out in detail in chapter five and summarized below:

1. **Tourism Risk and Crisis Management Framework.** This component of the framework supports bouncing back in years one and two of the plan;
2. **The Blue Ocean Strategic Management Framework.** This component of the framework supports re-imagining the tourism sector in years three and four according to a new business model based on differentiation, which will replace the investment-driven, accommodation-focused model of the last two decades. The new business model will require a comprehensive upgrading of the local tourism value chain between 2026 and 2030, which represents the long term.

Differentiation will set the destination apart and include a variety of accommodation types at different price points, a wide range of attractions and activities based on local culture, and expanded shopping that promotes locally produced products, especially art, craft, fashion, cosmetics, confectionery, spices and beverages. Underpinning all of this will be processes which provide visitors with a safe, secure and seamless experience and make the destination more sustainable and resilient. This form of differentiation will produce tourism experiences which cannot be replicated by other destinations.

3. Strategic Pillars. The third part of the strategic framework is a set of five strategic pillars and thirty-eight sub-pillars which underpin the rest of the framework. The Pillars represent a globally recognized set of priorities, which the Ministry of Tourism uses for benchmarking and advancing the local travel and tourism sector. These Pillars are cross-functional and cross-organizational in nature and represent areas at which the destination must excel if it is to achieve its goals. In each MTF, the Ministry identifies a critical set of sub-pillars which require specific intervention based on the goals and objectives of the strategic business plan and the evolving requirements of the travel and tourism market.

A tropical beach scene with a hanging wicker chair, palm trees, and a boat on the water. The chair is made of woven wicker and has a red cushion. It is hanging from a thick tree branch. The background shows a sandy beach, a blue ocean with a small boat, and a blue sky with white clouds. Palm fronds are visible in the upper right corner.

CHAPTER 2: INTRODUCTION

*If one does not know to which port one is sailing,
no wind is favourable.*

Seneca

2.0 INTRODUCTION

The Ministry of Tourism and its partners in the tourism sector collaborated to develop a sector-wide strategic framework to cover the next four fiscal years of the medium-term planning cycle, which runs from 2021 to 2025, as well as broader development needs of the destination up to 2030. The strategic framework is complete with a comprehensive and integrated suite of goals, outcomes, objectives, strategies, and actions aimed at returning Jamaica's tourism sector to its trajectory of delivering sustainable growth and inclusive socio-economic development. The **goals of the framework** are as follows:

-  A. Make the tourism sector more resilient to future shocks, whether they be human or natural in origin.
-  B. Make the tourism environment sustainable according to the triple bottom line.
-  C. Offer visitors an unmatched value proposition based on innovative, diversified and differentiated tourism products.
-  D. Return the tourism sector to a growth trajectory by attracting a wider and more balanced range of high-quality investments in accommodation, attractions, and leisure activities.
-  E. Move local businesses up the tourism value chain to reduce leakages and support more inclusive social and economic development.



The strategic framework will involve phasing in a series of innovative strategic initiatives over the next decade to make Jamaica the world's preferred warm-weather destination. In the short term, or years one and two, the initiatives will help the sector to bounce-back to former levels of visitor arrivals, earnings, and employment; in the medium term, or years three and four, the initiatives will reset the sector by restructuring the value chain, strengthening institutions and governance, improving infrastructure, and developing new products and services; and in the long term, or years five and beyond, the initiatives will help the sector to build forward stronger with new and innovative offerings to visitors which will increase earnings, retention, and the level of inclusive development. Translating this into performance metrics, the Ministry sets the following targets for the MTF: five million visitor arrivals annually, five billion dollars in earning annually, and five thousand new rooms added to the stock by 2025. A more detailed breakdown of the targets can be found in Appendix C of this document.



Devon House, Kingston

“A key area of concern within the strategy involves addressing the concerns and needs of Generation COVID (GEN-C) Tourists. Attracting and serving GEN-C tourists requires the management of travel restrictions, the restoration of traveller confidence, and rethinking the tourism sector for the future.”

2.1 STRATEGIC COMPONENTS

To provide a comprehensive and integrative planning and implementation framework, the planning process has identified four critical areas of strategic focus which ensure a balanced selection of objectives, targets, and actions that will ensure achievement of the outcomes and goals.

COMPONENTS OF THE STRATEGIC FRAMEWORK FOR JAMAICA’S TOURISM FOR 2021 to 2025



1. Demand Measures. Demand relates to the needs, wants, and expectations of visitors, especially those of GEN-C tourists. In the short-to-medium-term, the Jamaica Cares programme will be the primary platform for addressing these needs. It is a comprehensive, mandatory programme to increase traveller protection from the time they leave home until they return. Jamaica Cares includes a comprehensive suite of measures that Jamaica has put in place to create a safe destination for visitors and residents, including robust Tourism COVID-19 Health and Safety Protocols, Resilient Corridors, rapid medical response in case of emergency, the creation and implementation of a simple Travel Authorization process, and increased testing capacity to ensure that Jamaica is ready for evolving international entry mandates.

2. Supply Measures. Supply relates to the availability of suitable accommodation, attractions, activities, amenities, access, and ancillary services. TEF's Linkages Network Programme, and the Ministry's Investment Facilitation Framework and Strategy will be the primary platforms for upgrading and strengthening the local tourism value chain, integrating that value chain into other value chains, and reducing leakages. TPDCo, supported by TEF, will spearhead a significant upgrading of the tourism product with new and innovative offerings building on our natural and cultural heritage. A key component of this will be the expansion of new attractions and activities, and community and rural tourism. Examples of the new approach include development of ten themed public bathing beaches across Jamaica using a new, more sustainable business model; and the creation of an underwater statue park in Ocho Rios. Another important part of the supply side will be the continued thrust to diversify the type of accommodation on offer with the addition of new rooms with different characteristics, at different price points, and greater geographic dispersion. The diversification of accommodation is partially designed to support initiatives to grow community and rural tourism, health and wellness tourism, and retirement tourism.

3. Institutional and Governance Measures. Institutions and governance relate to efficient and effective coordination, collaboration and cooperation among key stakeholders that assures a resilient, sustainable, and competitive tourism sector. The Destination Assurance Framework and Strategy and the regional Destination Assurance

Councils will be the primary platforms for ensuring that Destination Areas are efficiently and effectively managed and that visitors have a safe, secure, and seamless experience. TPDCo will lead this process with initiatives to address tourism harassment and raise the levels of quality relating to service delivery, hygiene, health and safety, disaster risk management, business continuity, and environmental management. Environmental protection, to include better waste management, the replanting of sea grasses and mangroves, the restoration of coral reefs preserves beaches and coastal marine life and supports healthy and aesthetically pleasing destinations. Environmental protection will also be linked to product development to ensure synergies as many environmental protects can become tourist attractions in their own right and be of interest to those visitors who want more than recreation and who value learning and the acquisition of knowledge.

4. Human Capital Measures. Human capital represents the economic value of employees' set of knowledge, habits, competences, motivation, enthusiasm and other personality attributes. The competitiveness of a tourism destination requires an effective human capital management plan which will be developed by the Ministry and implemented primarily by TEF, through the Jamaica Centre of Tourism Innovation (JCTI), with the support of TPDCo. The JCTI will be the primary platform to build a quality tourism workforce that can access attractive jobs which offer decent working conditions, social protection, and upward social mobility. The Tourism Enhancement Fund will also develop a world-class tourism incubator to train and develop a cadre of tourism innovators and entrepreneurs. These six-to-twelve-month training and development programmes will target innovators and entrepreneurs from across the spectrum of TEF's Linkages Networks which include gastronomy, shopping, entertainment, sports, and knowledge. The incubator will offer formal training, mentorship, coaching, networking with potential investors, and support to move products from idea to market. Building a cadre of innovators and entrepreneurs from across all these networks ensures a more balanced and robust tourism value chain and the creation of more products and services to offer visitors. Eventually, Jamaica will position itself to be a major provider of tourism training to other countries whose tourism practitioners will be able to learn from the experiences and successes of Jamaican tourism.

VISION STATEMENT

Jamaica, the world's premier destination for unique, authentic and seamless tourism experiences provided in a safe and secure environment.

.....

MISSION STATEMENT

To accelerate the recovery of the tourism sector, Jamaica will use robust risk and crisis management strategies; to re-imagine the tourism sector we will use the Blue Ocean and Destination Assurance Strategies to promote resilience, stimulate innovation, facilitate product differentiation, and expand opportunities for inclusive development.

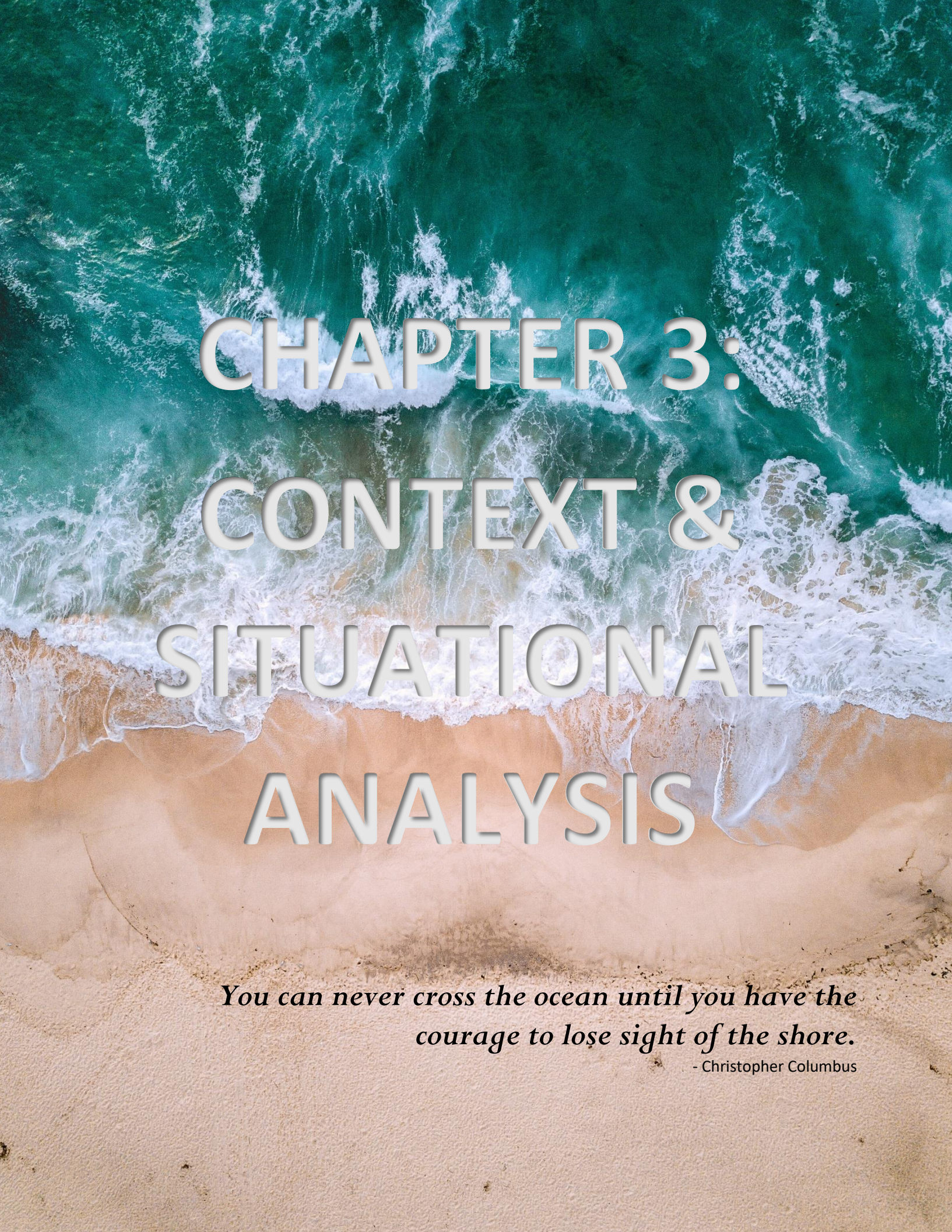
2.2 STRATEGIC FRAMEWORK

The development of the strategic plan will be guided by two well-established strategic planning methodologies: a tourism risk, crisis and recovery management framework adapted from the Pacific Asia Tourism Association (PATA) to support bouncing back in years one and two of the plan; and the Blue Ocean strategic management framework adapted to support re-imagining the tourism sector and upgrading the value chain in years three and four of the plan and beyond. Jamaica will therefore be able to establish itself as the world's premier warm-weather destination in years five to 10 of the plan.



These well-established frameworks with their suite of analytical tools, the requirement for evidence-based decision-making, and collection of best practices will restore Jamaica's tourism sector to a path of growth as well as guide Jamaica to create, through a new business model based on differentiation, an uncontested market space, which no competitor can replicate.

The strategic plan will identify and establish innovative policies, systems, protocols, and standards that assure our visitors a safe, secure, and seamless experience while building out a new national tourism model based on a broader offering of accommodation types, and a diversified portfolio of unique and authentic attractions and leisure activities which draw heavily on Jamaica's natural and cultural assets. A detailed discussion of tourism risk, crisis and recovery and the Blue Ocean Strategic Framework will take place in Chapter 6.

An aerial photograph of a beach with turquoise waves crashing onto the shore, creating white foam. The text is overlaid on the image.

CHAPTER 3: CONTEXT & SITUATIONAL ANALYSIS

*You can never cross the ocean until you have the
courage to lose sight of the shore.*

- Christopher Columbus

“

Jamaica's tourism growth over the past two decades has been influenced by the international attractiveness of the destination, built on Brand Jamaica, as well as the attractive fiscal incentives offered to certain segments of the tourism sector by the Government of Jamaica.

”

3.0 CONTEXT & SITUATIONAL ANALYSIS

Jamaica's tourism sector is one of the largest economic sectors in the country. In 2019 the tourism sector directly contributed 9.8% to the country's GDP, or J\$206.8 billion, and employed 12.6% of Jamaica's labour force. This performance was achieved by attracting over 4 million visitors who generated about US\$3.7 billion in earnings for the sector. Stopover visitors were almost 2.5 million of the total number of visitors and they generated US\$3.5 billion in earnings from an average stay of eight nights in Jamaica. The remaining visitors in 2019 were brought to Jamaica's shores by cruise ships visiting Montego Bay, Falmouth, Ocho Rios, and Portland.

The tourism sector has grown significantly since 2000. In that year 1.1 million visitors came to Jamaica, generating US\$1 billion in earnings from 12,000 rooms and the cruise ports of Montego Bay and Ocho Rios. Between 2000 and 2019 Jamaica has added 20,000 rooms, opened a major cruise terminal in Falmouth in 2011 and another in Port Royal in early 2020, and expanded and upgraded the two international airports as well as several aerodromes. This growth has been influenced by the international attractiveness of the destination to visitors, built on Brand Jamaica, as well as the attractive fiscal incentives offered by the Government of Jamaica to investors in certain segments of the tourism sector.

Jamaica's key tourism service infrastructure now includes a stock of 33,000 rooms, three international

airports capable of handling over six million arrivals, five cruise terminals capable of handling 10 ships, from boutique to the largest ocean liners, and three operational domestic aerodromes.

3.1 DESTINATION STRENGTHS

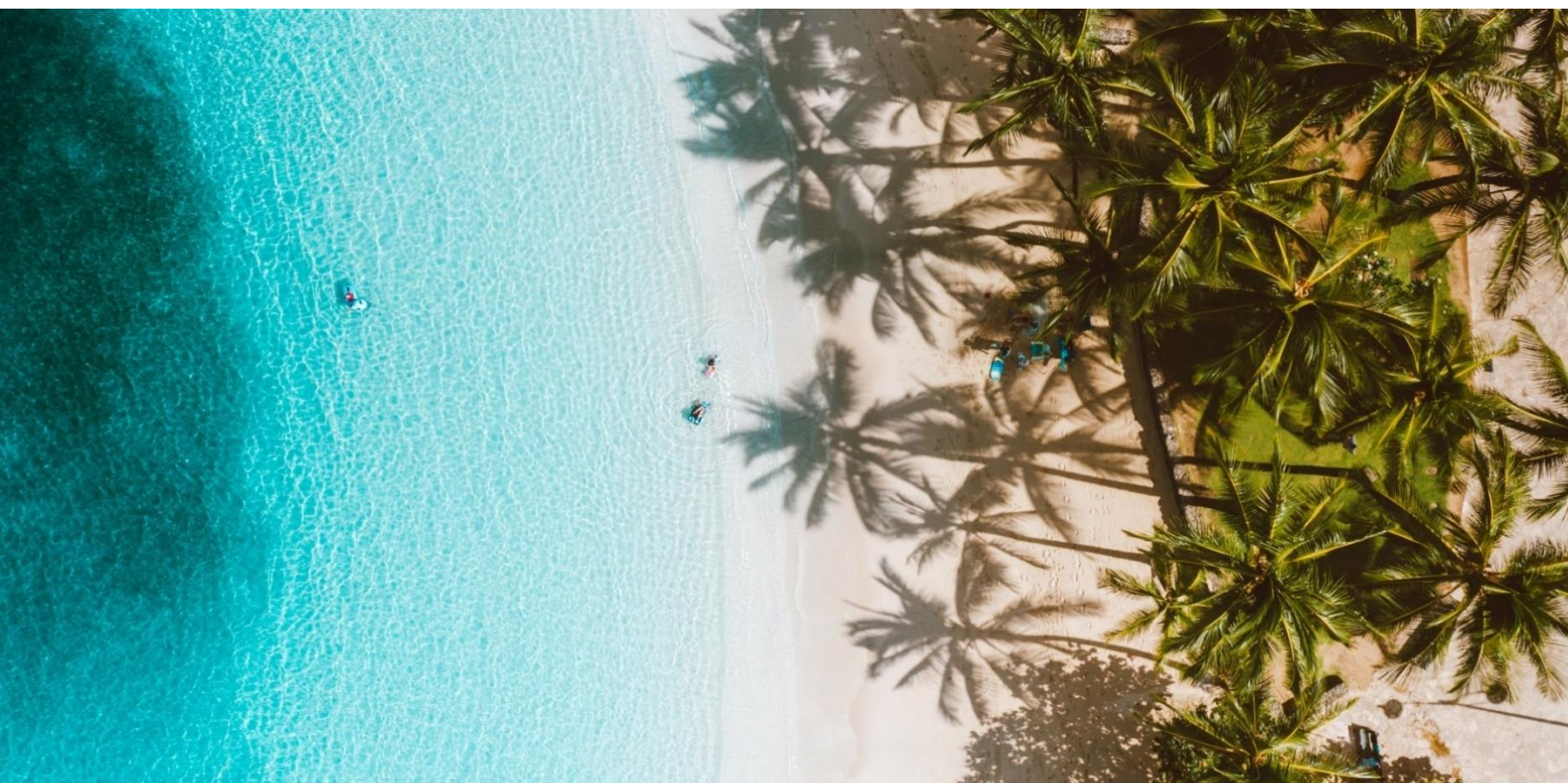
The business model for Jamaica's tourism from 2000 to 2019 was developed to encourage and facilitate investment to capture some of the steadily growing global demand for travel and hospitality. From 2000 onwards travel and tourism were the fastest growing and most resilient segments of the global economy with year-on-year growth averaging 4.2%. Jamaica's goals were to increase the number of visitors and the amount of income quickly and consistently; and the strategies employed to achieve this included expanding the room stock, increasing access to the destination through airports and cruise terminals, securing seats and berths coming to the destination, and promoting Brand Jamaica through a world-class marketing programme. The strategies employed between 2000 and 2019 were successful, and the goals identified were largely attained. The basic factors of "sun, sea, and sand" and the advanced factors of modern accommodation, international accessibility, and world-class marketing have become some of the strengths of the destination. As part of the new tourism business model Jamaica will seek to develop more advanced factors such as a world-class tourism workforce, a larger pool of innovators and entrepreneurs, and SMART destinations more suited to an increasingly knowledge-based economy.

3.2 DESTINATION WEAKNESSES

The destination, however, is not without its weaknesses. First, most of the growth in accommodation took place in a narrow market segment: all-inclusive resorts, the majority of which are foreign owned and now control about 80% of the room stock. Accommodation thus takes up an increasing share of tourism's economic activity. Second, the resort model of tourism leads to standardization of the product across multiple destinations, and this puts pressure to compete on price: international resort chains have an incentive to deliver standard services to protect their brands, maintain quality control, and lower operating costs. Third, the resorts are concentrated in or near a few traditional resort towns: these regions face development pressures and the threat

of over-tourism, while community and rural tourism across most of Jamaica and city tourism in Kingston are underdeveloped. Fourth, the development of tourism infrastructure and amenities has lagged behind investments in accommodation and international access: roads are often congested, fresh water sources are under pressure, coastal waters are increasingly polluted, and solid waste is not properly collected and often clogs drains. Fifth, the destination has been criticized for its offering of attractions and activities: there is a paucity of high-quality indigenous entertainment and nightlife; attractions and activities do not sufficiently reflect the full breadth of the rich natural and cultural heritage of Jamaica; and shopping networks do not sufficient showcase local art, craft and other indigenous products.

The need to re-examine the accommodation growth model of tourism can be interpreted from the graphs in Figures 1 and 2. These graphs for foreign exchange earnings and visitor arrivals show linear relationships with consistent upward growth between 2009 and 2019; however, using logarithmic relationships the same graphs suggest that the long-term rate of growth is levelling off. This means that the rate of growth is increasing at a decreasing rate as would be expected from a maturing destination. A similar pattern of a maturing destination can also be inferred from Figure 3 compares global trends against local trends in relationship to visitor arrivals. Prior to 2015 the year-on-year growth in total Jamaica's visitor arrivals exceeded the global average for growth; however, since 2015



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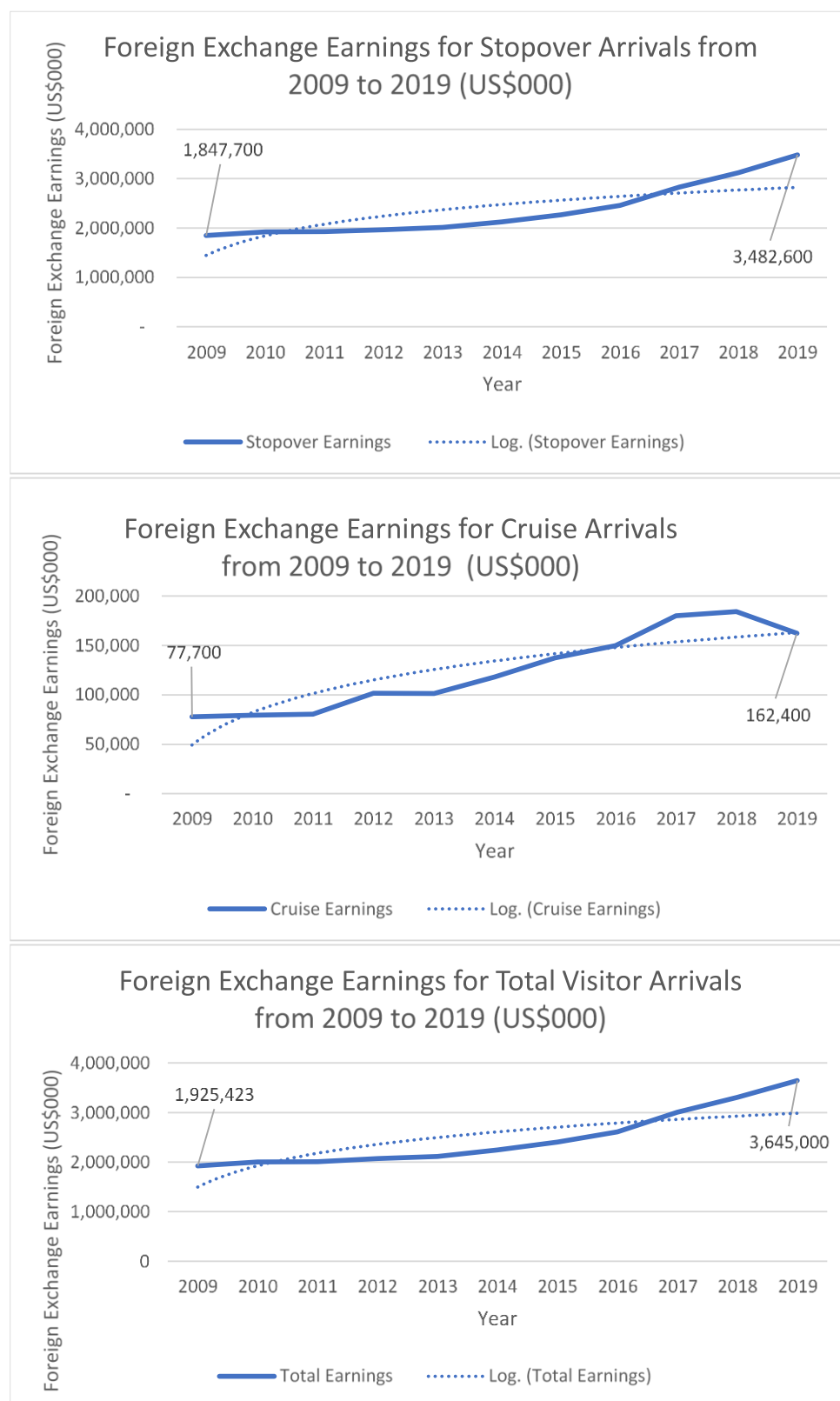
Jamaica's existing tourism business model, which served the destination well, is almost two decades old. 2021 is a good time to re-evaluate and reset this business model to ensure the destination remains competitive and relevant in the post-COVID-19 era.

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the year-on-year growth in total arrivals fell short of the global average. This was driven by negative trends in cruise tourism, which were somewhat compensated for by increases in stopover visitors. These trends suggest that sustainable long-term growth in both visitor arrivals and earnings cannot be taken for granted in an increasingly crowded and competitive global tourism market, and that the mere presence of accommodation and cruise ports does not guarantee a consistent flow of tourists. These trends suggest that 2021 is a good time to re-evaluate and reimagine Jamaica's tourism business model if we are to return to a sustainable growth path after we emerge from the pandemic.

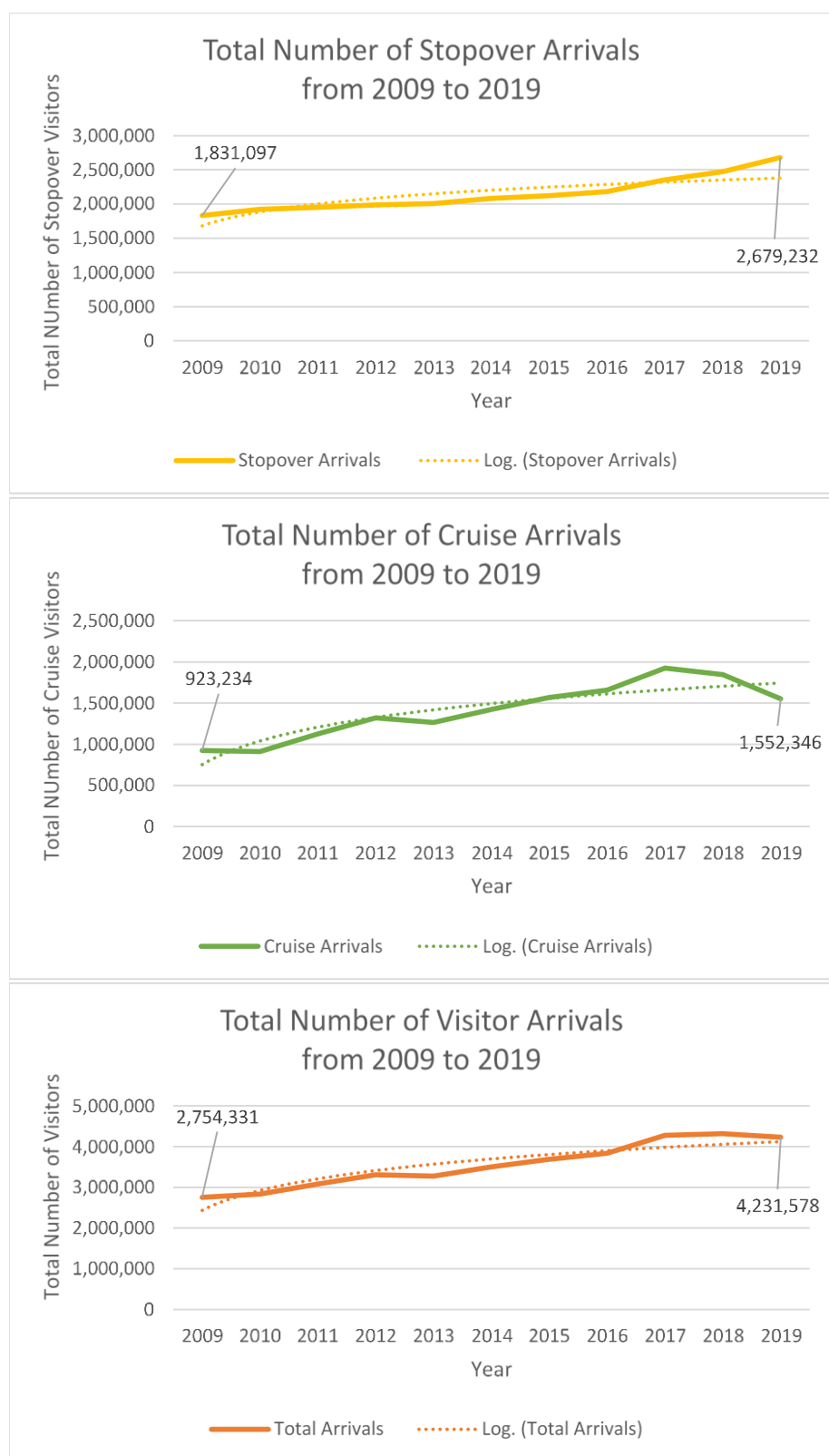


Figure 1. Linear and Logarithmic Growth in FX Earnings 2009-19 (US\$000)



SOURCE: JTB

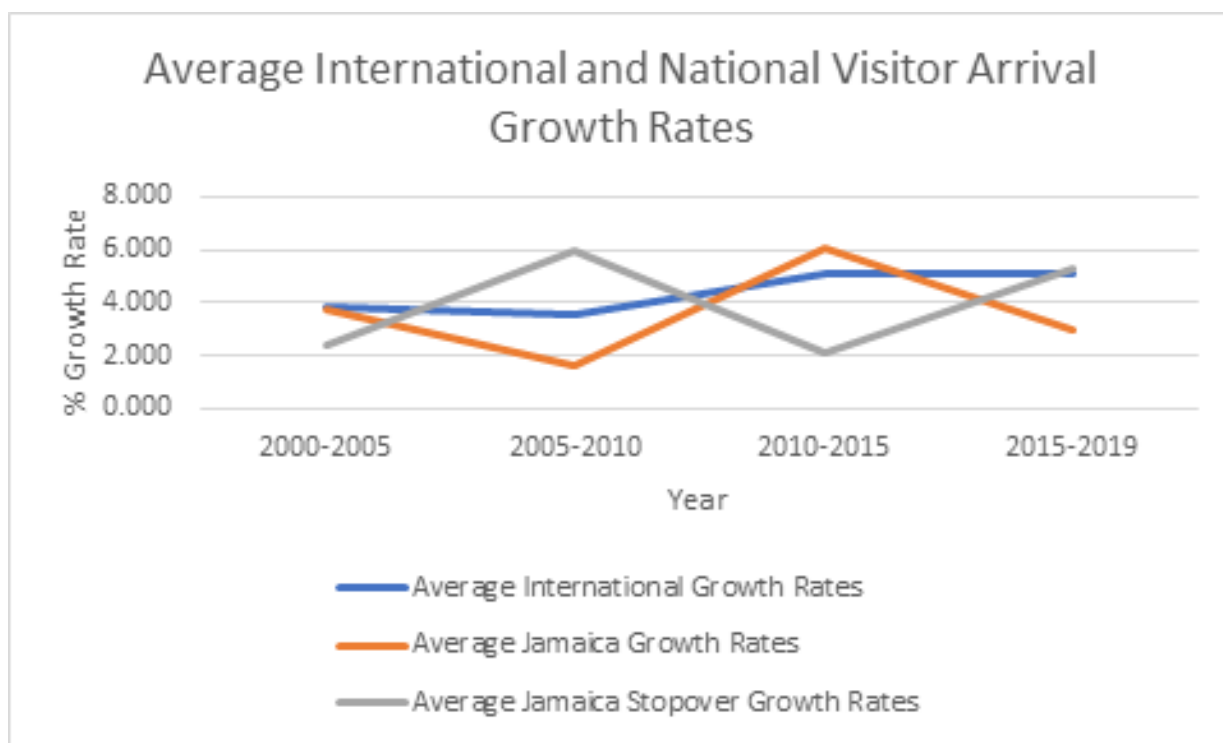
Figure 2. Linear and Logarithmic Growth in Visitor Arrivals 2009-19



SOURCE: JTB

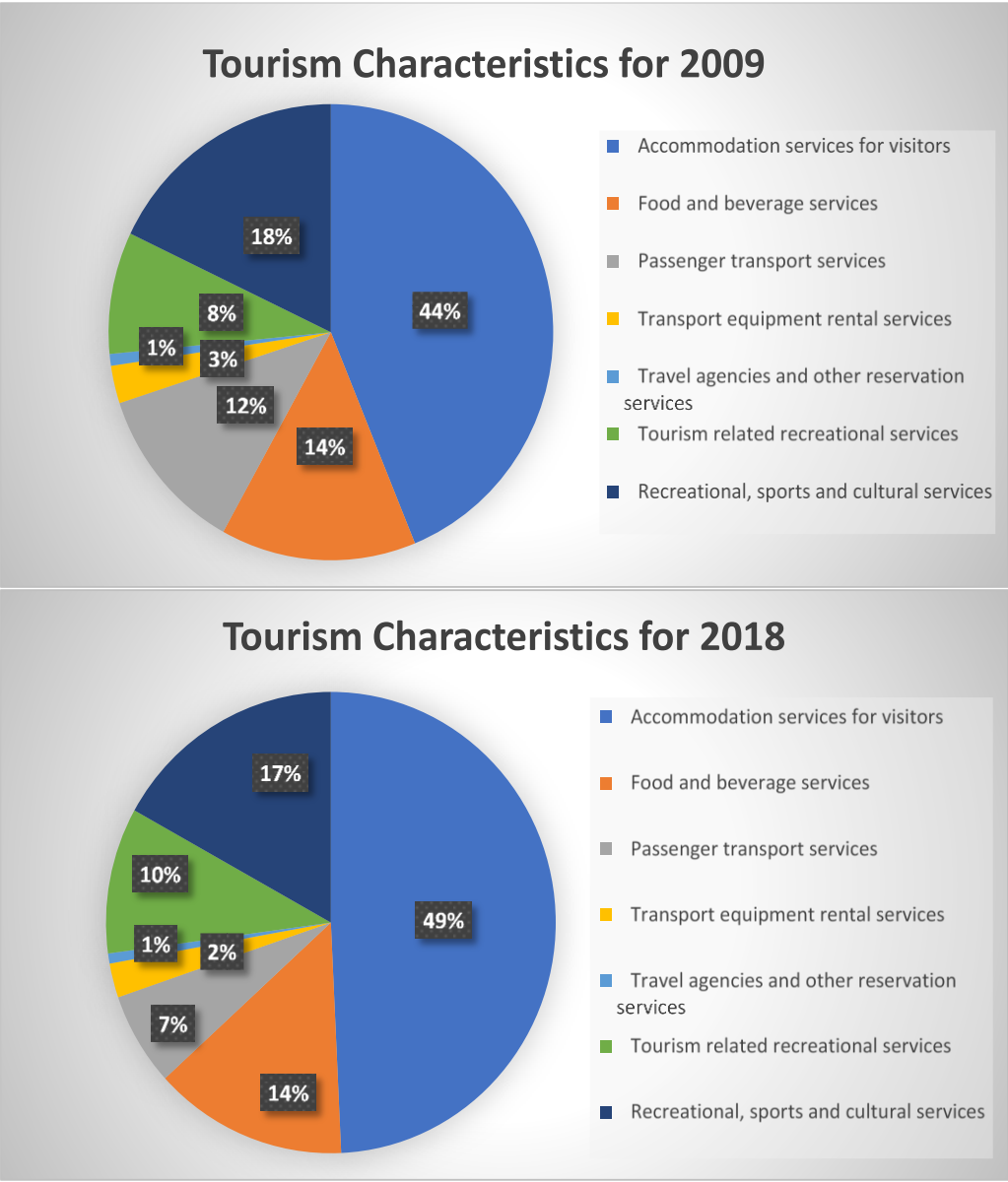
Weaknesses in the destination can also be seen in shifts in the structure of the tourism value chain which are represented in Figure 4. The relative combined share of higher value sub-sectors, like entertainment, tourism recreational activities and sports and cultural services, which tend to have a lower level of leakage, has moved only from 26% to 27% compared to accommodation which has moved from 44% to 49%. Food and beverage services remain at 18%, while transportation services have shrunk from 12% to 7%. This suggests that while factors and demand conditions have been favourable to the destination, firm strategy, structure and rivalry favours vertically integrated international tourism enterprises and all-inclusive hotels, which have been able to capture a greater share of the value which traditionally accrued to local tourism actors. The significant investment in the accommodation sub-sector has not been accompanied by similar levels of investment, improvements in productivity or the adoption of innovative business models in some of the other tourism sub-sectors or in the tourism supplying and tourism support sectors. Efforts therefore must be made to upgrade factor conditions and strengthen related and supporting industries.

Figure 3. Growth Rate in Tourist Arrivals: Global versus Local



SOURCE: UNWTO

Figure 4. Relative Shares of the Tourism Sector by Tourism Subsector



SOURCE: STATIN

3.3 DESTINATION THREATS

Jamaica's tourism sector faces several threats. The chief threat is internal and comes from the persistently high rates of crime and the harassment of tourists. While risks to visitors is low and few visitors are victims of crime, the security situation is nevertheless a serious threat to the international image of the destination, repeat business and referrals by visitors. Another threat comes from increasing levels of regional competition for visitors from North America as most countries in the region are major tourism destinations. Regional competition could significantly increase if relations improve between the USA and Cuba and the new administration in Washington eases restrictions on travel and investments. Also, other regional competitors are aggressively investing in tourism accommodation and infrastructure to expand and upgrade their destinations. Another set of enduring threats include natural disasters, emergencies and climate change for which the destination needs to improve sustainable practices and build more resilient infrastructure and systems. The COVID-19 pandemic of 2020 had a major and unprecedented impact on Jamaica's tourism sector. The pandemic, which reached Jamaica in March 2020, effectively closed the sector for three months resulting in a collapse in earnings, a fall-off in revenue for the government and massive layoffs across most sub-sectors (see Figures 5 & 6). Since reopening in June 2020, the rate of occupancy has been around 20% compared to 80% pre-COVID-19, and members of the Jamaican Diaspora represent a high proportion of the limited number of visitors coming to Jamaica. For the period January to December 2020, Jamaica welcomed approximately 1.3 million visitors, which was a 68% reduction when compared to the previous year, and recorded earnings for the sector of US\$1.3 billion, which was a 64% decline in comparison to 2019. From April 2020 to March 2021, the impact of the COVID-19 pandemic reduced direct tourism revenue to the government by J\$46.3 billion, or 85.3%, when compared to the previous year. The frequency and impact of crises, emergencies, and disasters is only likely to increase in the coming decade and so must Jamaica's level of investment in mitigation and preparedness as well as its capabilities to respond and recover quickly.

Figure 5. Visitor Arrivals in 2019 and 2020

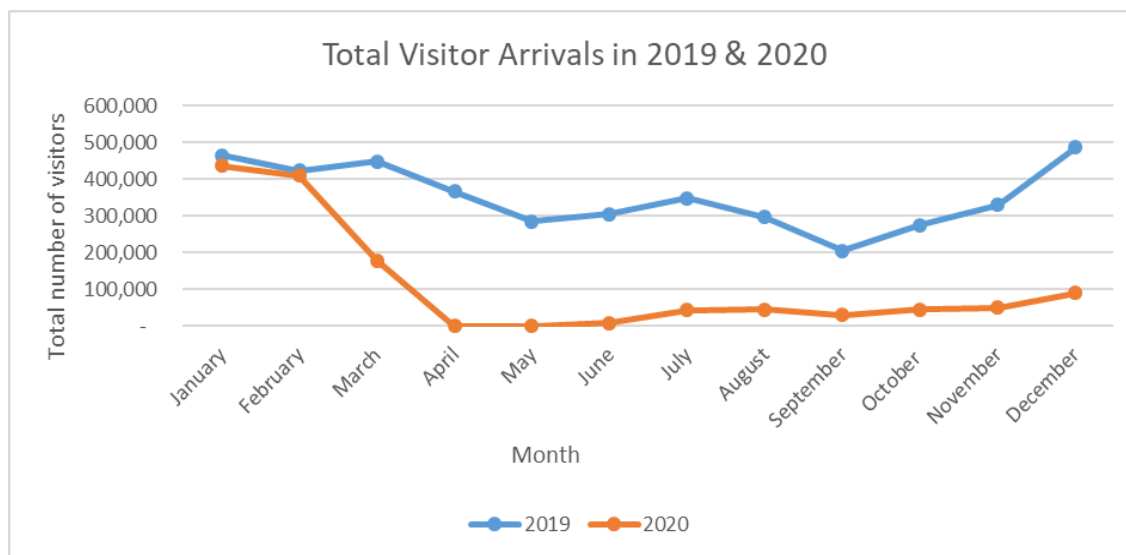
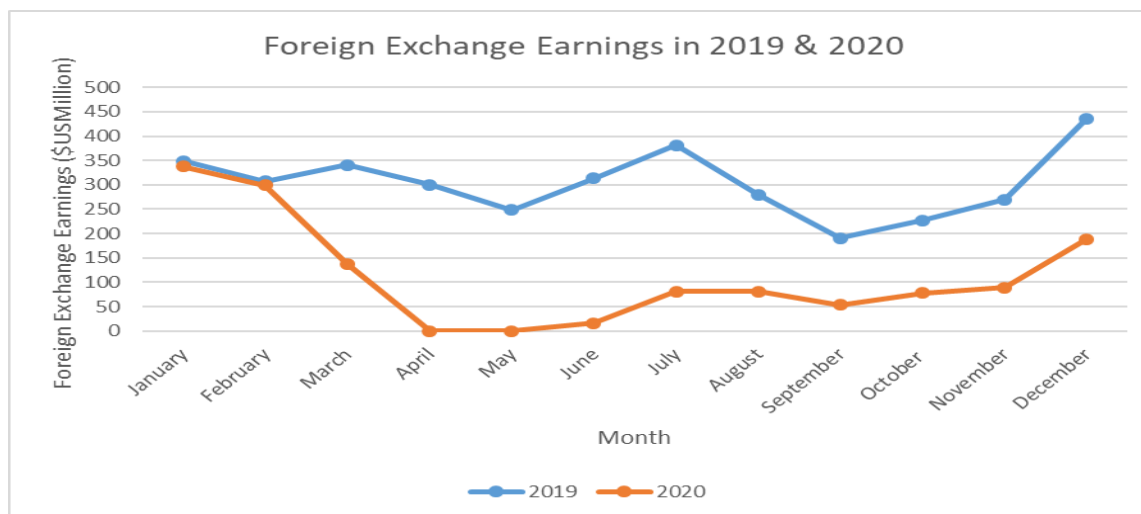


Figure 6: Foreign Exchange Earnings in 2019 and 2020



3.4 DESTINATION OPPORTUNITIES

COVID-19 and the public policy responses to contain the spread of the virus have profoundly altered the global travel and tourism sector with the impact being strongly felt in Jamaica. The impact of the virus and emerging trends will possibly restructure the global travel and tourism sector for several years. Some of the trends emerging from the pandemic represents short-term opportunities for Jamaica to help the sector bounce

back. For example, lock downs, work-from-home requirements, and government cash transfers mean that affluent consumers in the developed world have increased their savings and have a potential pool of disposable income to spend on travel and leisure activities when restrictions are lifted. In the United States, the Federal Deposit Insurance Corporation (FDIC) estimated that there was a record \$2 trillion surge in deposit accounts in the first half of 2020¹. Emerging research is also suggesting that lockdowns and work-from-home have placed additional psychological demands on many people and worsened mental health outcomes for some². There is the possibility that travellers will stay closer to home leading to a faster recovery of domestic tourism and a negative short-term impact on international tourism^{3,4}. These trends, however, suggest to the Ministry of Tourism and the Jamaica Tourist Board (JTB) that there will be pent up demand for travel and leisure activities, which Jamaica can capitalize on to speed the recovery of the sector.

The public policy prescriptions to speed up the recovery of Jamaica's tourism sector from the pandemic must consider the impact along numerous dimensions and ensure the destination is ready to attract and receive visitors in the short term. First, one set of factors is demand considerations. Travellers will demand higher health, safety, and hygiene standards, clear travel information, and reduced travel uncertainty. It is therefore critical that promotional efforts reassure potential visitors, and that health and travel protocols support the safe and convenient return of international tourism. Second are the supply considerations. Approximately 80% of tourism enterprises are micro, small and medium in scale and these are most at risk⁵. It is therefore imperative that government works with tourism stakeholders to support tourism businesses to adapt, survive, and restructure, create incentives for private investment, upgrade skills of workers, develop response measures to maintain capacity in the sector, and address gaps in infrastructure,

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- 1 Son (2020). U.S. banks are 'swimming in money' as deposits increase by \$2 trillion amid the coronavirus. CNBC
 - 2 Chung, et al. (2021). Working from Home during the COVID-19 Lockdown: Changing preferences and the future of work. Universities of Birmingham and Kent, UK
 - 3 Jeong & Wen (2020). Travel Is Bouncing Back From Coronavirus, but Tourists Stick Close to Home. Wall Street Journal.
 - 4 Binggeli, Constantin, & Pollack (2020). COVID-19 tourism spend recovery in numbers. McKinsey.
 - 5 Elias, et al. (2020). How can Hospitality, Travel, and Tourism bounce back stronger after COVID-19. Deloitte.

amenities, and tourism support services⁶. Third are policy responses. Critical to restoring and re-imagining tourism will be building more resilient and sustainable tourism destinations, and the strengthening of regional and international cooperation between countries⁷. Fourth are human capital responses. Jamaica must develop a world-class tourism workforce that is tech-savvy and culturally competent.

There also exist long-term opportunities for the destination. First, future travel will inevitably look different from the pre-pandemic period. Research, data collection and analysis, and market intelligence will therefore be vital to making strategic and tactical decisions in real-time and better anticipating, preparing for, and responding to emerging risks. Second is the acceleration in digitization and the importance of information and communication technologies. Jamaica needs to position itself as a smart digital destination, which allows visitors to be fully connected within Jamaica as well as outside the destination 24/7. Third, the pandemic has encouraged a shift in the attention of travellers towards sustainability and resilience. Jamaica needs to respond to this with a tourism product that has a lower environmental footprint yet facilitates the increasing number of visitors who want to experience the country's natural and cultural heritage and participate in nature and adventure tourism. Fourth, bouncing back, re-imagining, and building forward better will require innovation, entrepreneurship and multi-stakeholder collaboration. These make it necessary to upgrade human capital at all levels, improve tourism governance, and facilitate public-private partnerships to leverage the skills, competences and resources of the public and private sectors.

The Ministry of Tourism held extensive consultations with the tourism sector in 2020. Tourism stakeholders shared their ideas for strategies to facilitate the sector to Bounce Back, Reset, and Build Forward Better. The stakeholders offered their vision of where Destination Jamaica will be in the next 5-10 years. It is based on these consultations that the Ministry was able to refine the goals, outcomes and objectives outlined in this plan.

6 OECD (2020). Rebuilding tourism for the future: COVID-19 policy responses and recovery.

7 Ibid.

The following represents a summary of the thematic areas that stakeholders identified as key to strategic change:

1

The Tourism Business Model & Competitiveness

The future business model will be built on unique tourism experiences with natural and cultural heritage at the core of the differentiated offering. It will also include virtual or immersive experiences which will convert the travel experience into an unforgettable time. Emotions and sensations will be a part of the overall impression and will help to determine the level of visitor satisfaction.

2

Destination Assurance

Jamaica will have upgraded systems for management, governance, certification, quality, and licensing reflecting the different types of tourism entities. These systems will promote competitiveness, sustainability, resilience, diversification, and guarantee quality service standards. These new systems will ensure the delivery of an exceptional visitor experience and promote Jamaica as a destination of excellence and distinction.

3

Affinity for Tourism

Jamaica must curb tourist harassment through a broad-based coalition of stakeholders. Public support for tourism must include an awareness of the sector's social and economic importance. Jamaica must foster a culture that is open to tourism and foreign visitors, reduces harassment of visitors, treats these visitors professionally and with respect while retaining our cultural authenticity.

4

Tourism Infrastructure

Jamaica's infrastructure will meet international standards for comfort, safety, and efficiency. This includes an extensive road network that provides efficient and convenient access to key business centres and tourist attractions. Jamaica will also prioritize efficient and sustainable systems for water, energy, sewerage, and solid waste to reduce pollution and the emission of greenhouse gasses. ICT infrastructure will also offer visitors global connectivity.

5

Human Capital Development and Social Protection

Jamaica will create a tourism workforce that is highly-skilled, technologically-capable, multilingual, and culturally competent with internationally recognized certification that is demanded by employers. The working environment will be cultivated to encourage employees to perform at the highest levels. Jamaica will develop or expand schemes for social protection including health, unemployment and pensions, and expand access to housing.

6

Tourism Amenities and Destination Aesthetics


Jamaican Destination Areas will have clean, safe, walkable public spaces, parks, gardens, and markets. Public spaces, gullies, and drains will be free of solid waste as Jamaicans Reduce, Reuse, and Recycle. Tourism businesses will also engage in good sanitary practices. Visitors will have convenient access to safe, high-quality tourism amenities that help to deliver a safe, secure, and seamless experience.

3.5 BOUNCING BACK, RE-IMAGINING, BUILDING FORWARD BETTER

Jamaica's tourism sector therefore finds itself at a strategic crossroads. It has developed over the last two decades into a mature warm-weather destination whose product offering has been built primarily around world-class accommodation utilizing the destination's generous supply of “sun, sea, and sand.” In the competitive space that Jamaica's tourism industry operates, most other destinations offer a similar warm-weather experience based on “sun, sea, and sand” and high-quality accommodation, often through the same international hotel brands offering a highly standardized experience. Tourism is also important to the economies of most of the other countries in the region and they are all working hard to retake ground lost during the pandemic. This situational analysis suggests that Jamaica's tourism sector must therefore first recover from COVID-19 to reestablish the destination in the market; second, it must restructure its value chain to strengthen and upgrade the destination; third, it must move beyond a reliance on basic factors to develop advanced factors; fourth, it must develop related supporting industries; and, fifth, it must reposition the destination to create an uncontested market space with unique products and experiences which its competitors cannot duplicate to continue its growth trajectory and boost its relevance to economic development.

The speed and degree of recovery will be determined significantly by the strategies adopted by the Ministry of Tourism and its stakeholders. Jamaica's tourism sector needs to attract and meet the experiential needs of Gen-C visitors; facilitate the upgrading of tourism products; improve infrastructure, institutions, and governance; and strengthen and expand linkages with the tourism supplying and tourism support services sectors to better meet the commercial and competitive needs of the sector. **The current state of the tourism industry demands that Jamaica chart a new course in three phases: “bouncing back,” “re-imagining,” and “building forward better.”**



A man is sitting on the ground, weaving a large, round, shallow basket. He is wearing a light-colored short-sleeved shirt with dark stripes on the sleeves and khaki pants. He is focused on his work, with his hands moving quickly. The basket he is weaving has a pattern of light and dark brown sections. In the background, there is a white Toyota car with a green license plate that reads 'GPR272'. To the left of the man, there is a smaller, round, woven basket with a similar pattern. The scene is outdoors, and the ground is paved.

CHAPTER 4: VISION, MISSION, GOALS, OBJECTIVES & TARGETS

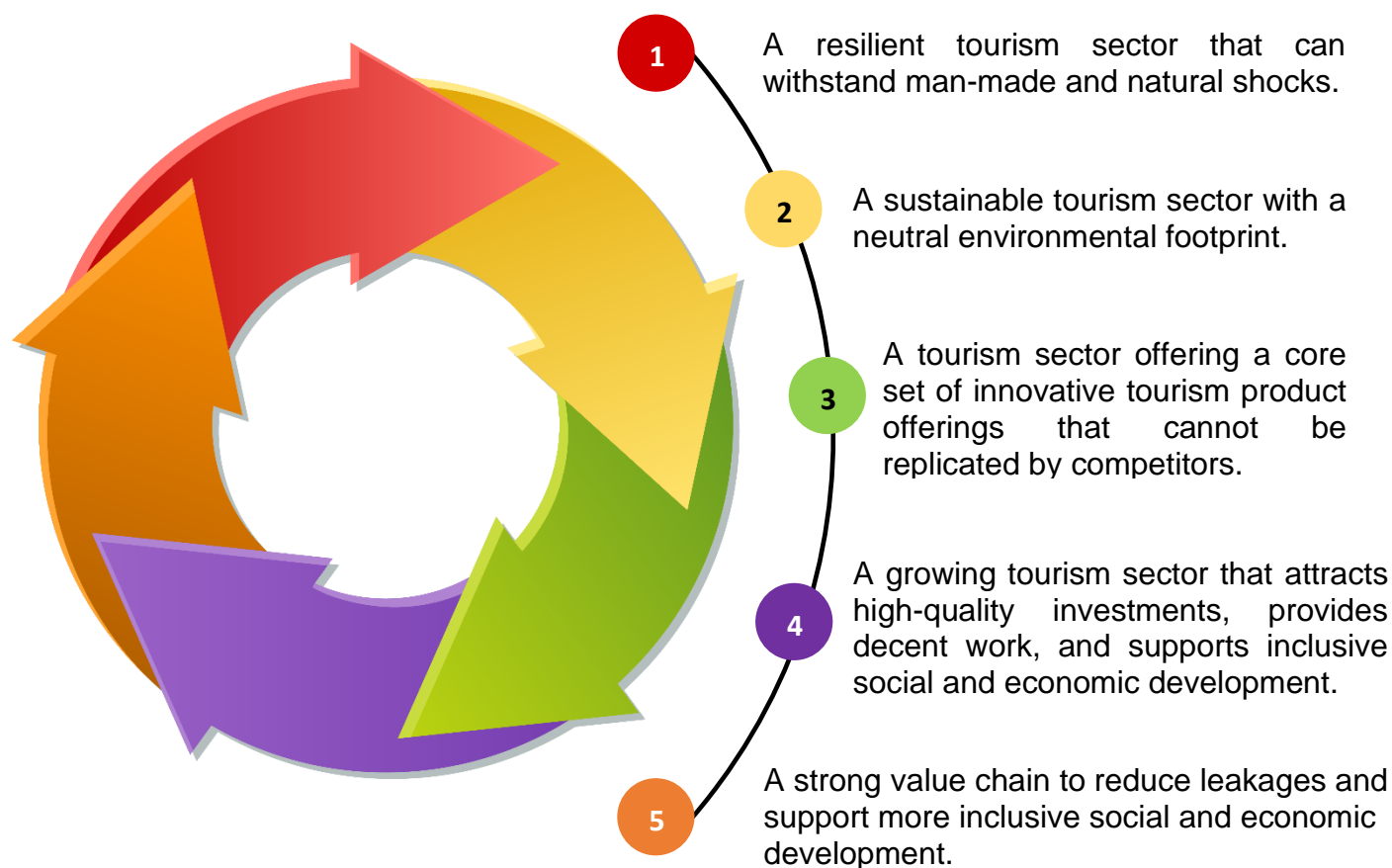
The value chain and business models that support the design, production, marketing and distribution of indigenous art and craft will be upgraded to strengthen tourism's linkages and bring more of the benefits of tourism to a wider cross-section of Jamaicans. This is a key objective of the Tourism Linkages Network initiative and an important strategy to increase tourism inclusion.

4.0 VISION, MISSION, GOALS, OBJECTIVES & TARGETS

As part of the planning process, the Ministry of Tourism and its stakeholders have developed a Vision and Mission and identified five long-term goals to provide strategic guidance and direction, facilitate planning, motivate and inspire stakeholders, and help the Ministry evaluate and enhance performance. The Vision and Mission are:



The following are the five goals of the Ministry to be achieved at the end of the **Medium-Term Strategic Planning Cycle**:




As part of its results-based performance management framework, the Ministry has also identified ten strategic outcomes with associated objectives and targets that are aligned to the goals and will move us closer to our vision and mission. These are:

Srl	Outcomes	Objectives	Targets
1	Increased resilience & sustainability of Tourism Sector	<ul style="list-style-type: none"> To implement a Resilient Tourism Framework & Strategy To implement a Sustainable Tourism Framework & Strategy To implement 3R's Programme across all Destination Areas 	<ul style="list-style-type: none"> Develop Resilient Tourism Framework & Strategy by 2022 Develop Sustainable Framework & Strategy by 2023 Implement a 3R's Programme by 2024

Srl	Outcomes	Objectives	Targets
2	Increased offering of natural & cultural heritage experiences	<ul style="list-style-type: none"> To establish a balanced portfolio of tourism attractions and activities by 2030 that utilize Jamaica's natural and cultural heritage To increase the number of licensed and operational community tourism enterprises 	<ul style="list-style-type: none"> Establish one Heritage Town in Bath, St Thomas by 2025 Establish one major new museum by 2025 Establish one managed walking space in each destination area by 2025
3	Increased level of participation by tourists in activities connected to natural and cultural heritage	<ul style="list-style-type: none"> To establish a balanced portfolio of tourism attractions and activities by 2030 that utilize Jamaica's natural and cultural heritage To increase the number of licensed and operational community tourism enterprises 	<ul style="list-style-type: none"> 50% of tourists to participate in at least one natural and cultural heritage experience during their visit by 2025 25 licensed and operational community tourism enterprises by 2025
4	Improved readiness of the tourism workforce for employment	<ul style="list-style-type: none"> To establish through the JCTI a permanent comprehensive suite of online tourism courses that lead to certification To develop a Human Capital Strategy & Framework 	<ul style="list-style-type: none"> Develop Human Capital Strategy & Framework by 2022 Complete the development of comprehensive suite of online tourism courses by 2023
5	Increased rate of innovation in the tourism sector	<ul style="list-style-type: none"> To establish, in partnership with UTech/UWI/JBDC/JAMPRO, a tourism incubator To establish a framework of grants and loans to support the development and commercialization of ideas generated from the incubator 	<ul style="list-style-type: none"> Develop framework for tourism incubator by 2022 Establish fully functioning tourism incubator by 2023
6	Increased share of tourism value chain produced and delivered by Jamaican businesses	<ul style="list-style-type: none"> To strengthen/upgrade the tourism value chain To diversify the accommodation sector to offer different styles, price points and locations To implement projects that increase the contribution to GDP from non-accommodation tourism sub-sectors To establish Jamaica as a regional hub for the tourism supplying and tourism support services sectors To create an environment that increases the level and quality of tourism investments 	<ul style="list-style-type: none"> Increase the level of foreign exchange retention from 40% to 45% by 2025 Establish one artisan village in each Destination Area by 2025 Develop Investment and Incentive Framework and Strategy by 2023 JCTI to offer online tourism courses to overseas based fee-paying students by 2023 Tourism incubator to start accepting overseas participants by 2024
7	Reduced level of harassment of tourists	<ul style="list-style-type: none"> To create a programme in each Resort Destination for the re-socialization and skills upgrading of informal vendors, touts, and vagrants and the 	<ul style="list-style-type: none"> Anti-harassment Framework and Strategy developed by 2023

Srl	Outcomes	Objectives	Targets
		implementation of such measures to empower them to earn a living in the formal economy	
8	Increased satisfaction in the Jamaican tourism experience	<ul style="list-style-type: none"> To implement the Destination Assurance Framework & Strategy (DAFS) To create the institutional capacity to administer the DAFS and to manage Resort Destinations To meet the demand from visitors for authentic Jamaican heritage and cultural experiences To meet the demand from visitors for a safe, secure, and seamless experience To meet the demand from visitors for a variety of accommodation options at different price points To expand and upgrade the Jamaica Cares Programme To expand/upgrade the network of tourism infrastructure and amenities across Jamaica 	<ul style="list-style-type: none"> DAFS developed by 2022, implemented by 2023 and fully operational by 2024 DACs fully staffed, trained and operational in all Destination Areas by 2023 95% of all visitors reporting that they enjoyed a safe, secure and seamless experience during their vacation in Jamaica by 2025 40% of Jamaica's room stock offering EP, Bed-and-Breakfast, Villas and Guest Houses by 2025
9	Increased number of Jamaicans who perceive that tourism is making a positive contribution to social and economic development	<ul style="list-style-type: none"> To implement a national communication programme to build tourism awareness 	<ul style="list-style-type: none"> Communication programme implemented by 2022
10	Increased use of evidence in decision making, policy, and strategy	<ul style="list-style-type: none"> To implement a framework for timely collection, analysis, reporting and sharing of data 	<ul style="list-style-type: none"> Data collection programme implemented by 2021

The choice of outcomes reflects the synthesis of research and analysis by the Ministry, consultations with its public bodies, and with other tourism stakeholders. The outcomes are aligned with the four areas of strategic focus and are designed to ensure that Jamaica's tourism sector "bounces back" by 2023, is "reimagined" by 2025, and is "built forward stronger" between 2026 and 2030. An Action Plan for the fiscal years 2021-2025 is summarized in Chapter 5 as next steps and set out comprehensively in Appendix C.

A vibrant tropical beach scene with several palm trees leaning over a white sandy shore. The ocean is a deep blue, and the sky is a clear, bright blue with a few wispy clouds. The text is overlaid in the center in a large, white, 3D-style font.

CHAPTER 5: TOURISM'S STRATEGIC PLANNING FRAMEWORK

“The Ministry of Tourism employed a formal planning process with two key components: broad-based stakeholder engagement and the development and employment of a structured conceptual framework to guide the planning process.”

5.0 TOURISM’S STRATEGIC PLANNING FRAMEWORK

Thoughtful and well-conceived strategic planning is crucial to navigating immediate challenges and for developing, enhancing and sustaining a destination’s attractiveness and competitiveness over the long haul. Strategic planning is especially crucial after recovery from a crisis such as COVID-19. Destinations are complex systems and strategic insights flow directly from the quality of the information gathering process and the fitness for purpose of the methodology employed. The Ministry of Tourism employed a formal planning process with two key components: broad-based stakeholder engagement and the development and employment of a structured conceptual framework to guide the planning process. Stakeholder engagement between the tourism sector and government was critical to developing a detailed understanding of the destination and its nuances, and in setting the groundwork for recommendations with sufficient collective buy-in to make subsequent implementation realistic. Conceptual frameworks are a network of concepts that together provide a comprehensive understanding of a destination so that we know its structure, how it works, and how its systems can be influenced. Using a conceptual framework in tourism strategic planning helps destination stakeholders to identify and then clarify trends, issues of central concern and things which the destination values. These are then connected to priorities, policies, strategies and actions that facilitate or promote positive change in the destination.

Given Jamaica's stage in the destination lifecycle as of 2019 and the disruption caused by the COVID-19 pandemic in 2020, it was determined that at least two conceptual frameworks had to be employed: one to facilitate bouncing back, and another to facilitate re-imagining and building forward better. The decision was taken to employ the tourism risk management and recovery framework developed for the Pacific Asia Travel Association (PATA) to guide bouncing back; and the Blue Ocean Strategy Framework to guide Re-imagining and Building Forward Better. The process and framework served as a starting point for guiding rigorous research and the crucial discussions with stakeholders about strengths and weaknesses of the destination, the opportunities and threats in the environment, the prioritization of goals and objectives, and the allocation of scarce resources. Through ongoing collaborative discussions with key stakeholders, the planning process identified areas for immediate priority action, areas for more deliberative investigation, and the creation of a framework for Response and Recovery.



The cruise ship pier in Falmouth, Trelawny, which was opened in 2011.

“The first leg of the conceptual framework was the employment of a tourism risk management and recovery framework.”

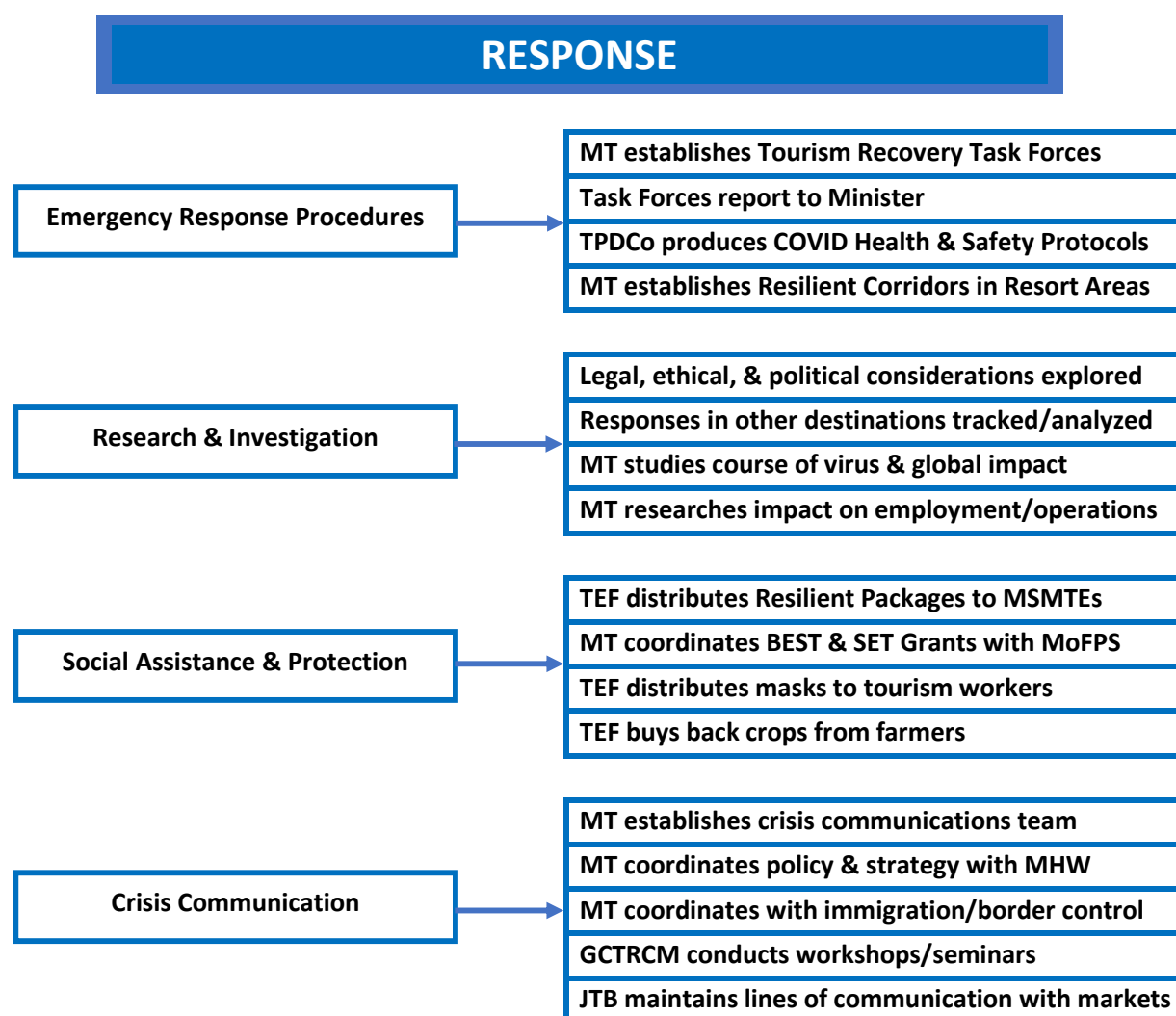
“The Ministry of Tourism and its public bodies responded to the global pandemic with a two-pronged strategy of Response and Recovery Planning supported by crisis communication activities led by the Jamaica Tourist Board, the destination’s world-renowned marketing arm.”

5.1 Bouncing Back through a Tourism Recovery Strategy

Jamaica’s tourism was faced with a severe crisis in 2020 in the form of a global pandemic which reached the destination’s shores in March. The result was the closure of the tourism sector for three months. COVID-19 met the classic definition of a crisis, which can be described as an event or set of circumstances which can severely compromise or damage the operation, marketability and reputation of a destination and its brand. The pandemic also met the two broad categorizations of a crisis: an event which is beyond the control of management; and one which results from a failure of management action, process or lack of contingency measures taken to deal with predictable risks. While crisis and risk management has long been an integral part of Jamaica’s tourism planning and management, the historic focus was shaped by experience which emphasized planning for and responding to hydrometeorological events, crime and harassment, and public health issues related to endemic tropical diseases. Pandemics were not high in the risk analysis. Nevertheless, while the steps of Reduction and Readiness were weak, the Ministry of Tourism quickly moved into crisis management mode in late March with a two-pronged strategy of Response and Recovery Planning. Two Task Forces were set up in April: one to plan the Response and Recovery of land-based tourism and the other to address cruise tourism. The recommendations of these Task Forces were submitted to Jamaica’s Cabinet for approval and to the Ministry of Tourism and its public bodies for detailed planning and implementation.

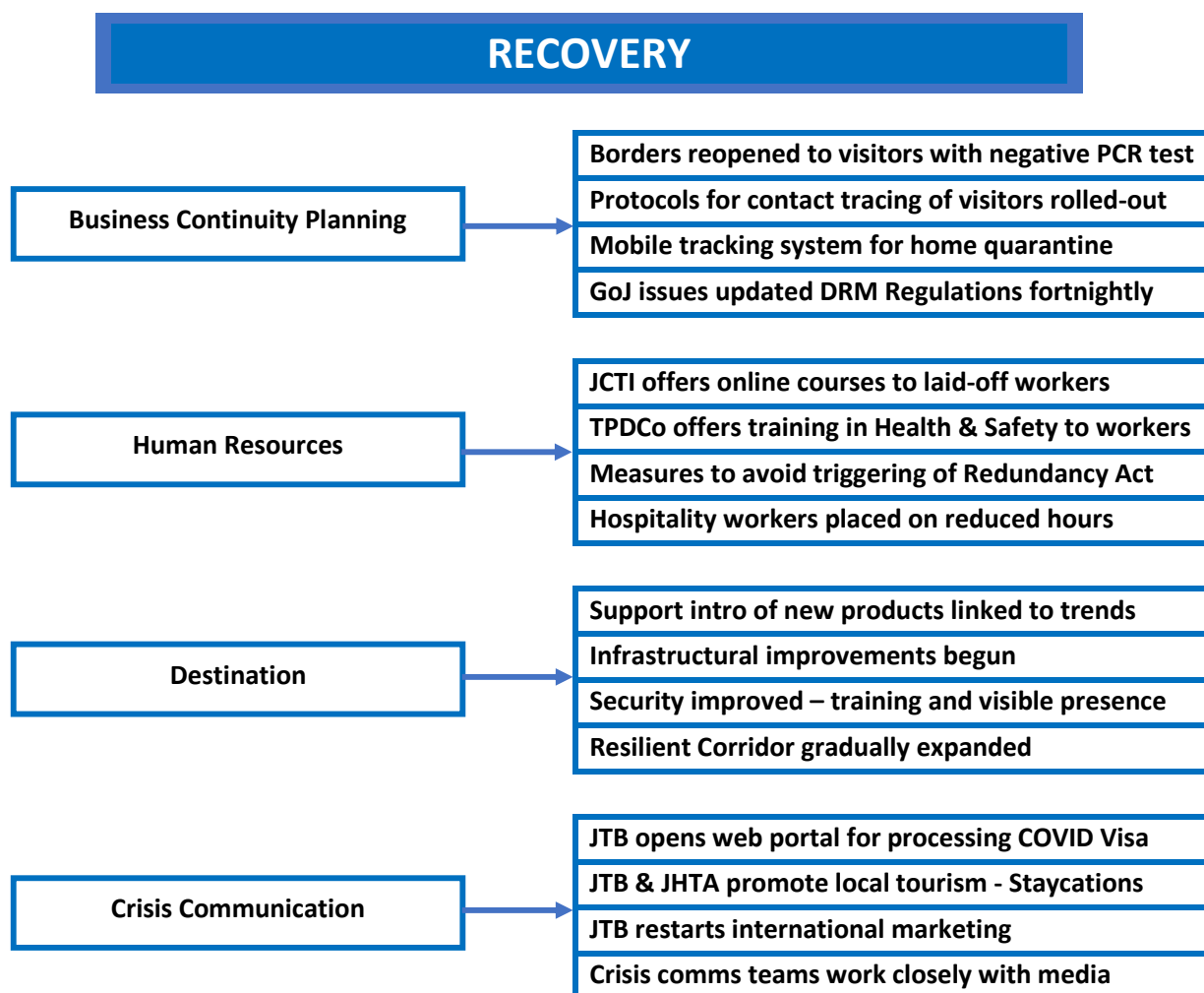
The three elements of this Bouncing Back strategy are as follows:

Response. The Ministry of Tourism has a six-phased contingency plan for pandemics, developed in response to the H1N1 pandemic in 2009. The Ministry of Health and Wellness also has a pandemic contingency plan which offers guidance and a framework for collaboration. The plan was activated in March 2020 and the Ministry moved directly to the Response Phase. The Ministry's approach was primarily comprised of ad hoc consultation with tourism stakeholders and real-time communication with the media and the process adopted to manage the situation acknowledged that not all the pertinent facts were at hand and the Response had to be developed incrementally and iteratively. Key elements of the Response were spearheaded by TPDCo. These included the



development and publication of Health and Safety Protocols, and subsequent training of tourism enterprises to implement these protocols; and the establishment of Resilient Corridors, which were designed to allow protocol compliant tourism enterprises to reopen and operate safely while reducing the contact between visitors and locals to minimize the risk of transmission of the virus.

Recovery. In late June, the decision was taken to gradually reopen the destination. The primary goal was keeping to a minimum the number of infected persons travelling to Jamaica and preventing infections among visitors and tourism workers from triggering community spread. Several strategies were explored; from testing visitors at the airport and allowing persons who tested negative to proceed to their hotel, to isolating or quarantining all visitors for two weeks in special hotels. The cost and logistical challenges of most options limited the procedural choices available in the short run. In the end,



visitors were required to have a negative test result prior to travelling and to acquire, through an online travel authorization portal operated by the JTB, a COVID-19 visa. At first visitors were restricted to their hotels but gradually as the Resilient Corridors became fully operational, limited movement within defined zones was permitted. The JTB restarted its marketing and the message under the Jamaica Cares programme was that the destination was ready to resume normal or close to normal operations, that entry was simple and efficient, and that strong health and safety protocols were in place. It was also consistently stressed that the recovery programme must be economically, socially and environmentally sustainable. Since the reopening of the tourism sector, the number of positive cases among visitors and tourism workers has been negligible and the majority of imported cases have been among returning Jamaicans who have failed to strictly obey the two-week self-isolation requirement. Another important recovery effort was targeted at the human capital of the sector, many of whom were laid off or reduced to part-time work. Here the JCTI offered several online courses to help tourism workers upgrade their skills and prepare for the reopening of the sector. More than 5,000 persons participated in this training.

Marketing & Communications. These efforts were divided between the JTB and the Communications Division of the Ministry of Tourism. Response and Recovery requires an intensive marketing campaign to assure prospective visitors and locals that the destination is not only open for business but safe and secure. The JTB was responsible for the international marketing and communications while the Ministry of Tourism was responsible for communicating with Jamaicans. The JTB could not rest on its marketing laurels but had to carefully re-examine the source markets and prospective visitor profiles to see what, if anything, had changed during the pandemic. It was during this examination that the concept of the Generation-COVID traveller and the Jamaica Cares programme were developed. On the home front the Ministry needed to communicate with the public about the fallout from the industry, assure the public that the industry was being prepared for reopening, and that reopening could be safely managed without contributing to community spread.

Table 1. Marketing Steps and Strategies for Crisis Management

10 Marketing Steps	Marketing Strategies Employed
Prime Messages	<p>Response Phase: At the onset of the pandemic, the destination promotion globally pivoted to empathy. Our message response was – <i>“Dream now, Travel Later.”</i> JTB marketing shifted completely from traditional media and onto the Digital and Social Media platforms where the agency executed campaigns such as – <i>‘Chill like a Jamaican’</i> and <i>‘Escape to Jamaica’</i>.</p> <p>Recovery Phase: The recovery messaging started with a domestic campaign – <i>‘Rediscover Jamaica.’</i> This message was later expanded into the Diaspora communities and fuelled the gradual recovery of the sector for the first 6 months after reopening Jamaica’s borders.</p>
Setting out the Facts	<p>The tourism sector pre-COVID had a net positive economic and social impact on Jamaica. The impact of the pandemic on the economy has been severe due to the cessation of air and sea transportation services for more than 90 days in 2020. Markets like Canada, Latin America and most of Europe have yet to resume outbound international travel. The Government of Jamaica also took the decision to restrict travel to Jamaica from countries that were experiencing high levels of positive cases. The industry needed to be protected and restored quickly to restore jobs, foreign exchange earnings, foreign direct investments, and government revenues. It is estimated that full recovery of pre-COVID tourism performance and contribution to the Jamaican economy will take 8-10 fiscal quarters.</p>
Complementary Alliances with Principals	<p>The alliance between the Ministry of Tourism and its public bodies and key tourism principals has never been more forceful and aligned in a single-minded proposition to place travel and tourism on a fast track to recovery and growth. There is a clear indication that, despite the pandemic, there is the appetite for deeper investment in Jamaica, evidenced by the presence of several new investment projects in new room stock, expansion of attractions, in the training and development of the tourism workforce, the expansion of the community tourism product and the creation of new resort areas. These are all positive developments and show the strength of alliances between tourism principals and the Ministry’s policy positions, which have been built up over the years</p>
Restoring Confidence in Source Markets	<p>The Ministry of Tourism, its public bodies, and key industry actors formulated a task force at the start of the pandemic to establish a recovery framework. This provided the leadership for the sector and by extension confidence in the source markets. The key deliverables from the taskforce which provided confidence to the markets were: (a) the establishment of Resilient Corridors which today remains the only such corridors in the region that provide a secure environment for visitors to enjoy the tourism product without direct contact with the majority of the population, (b) the automation of the travel authorization process, which streamlines the controlled entry of all arrivals to Jamaica and facilitates the pre-qualification of travellers who have not been exposed to the risks of COVID-19, and (c) clear and frequent communication with the media (mainstream and trade) as well as our key business partners, by creating daily access to information.</p>
Alliance Marketing Models to emulate	<p>The marketing model is action oriented and driven by a national focus on enhancing economic growth through travel and tourism. Jamaica is widely respected as a mature destination by thought leaders in the global sector, which sees many of our strategies being emulated by other highly dependent tourism economies.</p>
Protecting Viability/Profitability during Marketing Recovery	<p>The Jamaica Tourist Board has been unrelenting in its efforts to continually provide new content and material that inspires confidence in and demand for the destination. The “always on” approach to the marketing of the destination has followed a deliberate strategy:</p>

10 Marketing Steps	Marketing Strategies Employed
	<p>Media</p> <ul style="list-style-type: none"> Mainstream – Responsive Trade – Engaging Social – Interactive Digital – Always on <p>Advertising</p> <ul style="list-style-type: none"> Mainstream – Television and Radio advertising Trade – Cooperative Promotion Advertising with key trade partners Digital – Always on, Ad-word insertions and strategic location placement Print – Travel trade and mainstream publications with global reach <p>Promotions</p> <ul style="list-style-type: none"> Sales Promotions – collaborating with key partners to drive increased booking demand for the destination Trade Shows – participation in all major travel trade shows Travel Agents – Expansion of the Jamaica One Love programme with training and greater incentives to sell Jamaica <p>Relationships</p> <p>The key to our success has been and will continue to be the first-class relationships the marketing teams have with the key partners, e.g., Airlines, Tour Operators, Hoteliers, Attractions, Airports and the Media. These relationships are easily our most valuable marketing tools and are cherished as the lifeblood of our continued growth and success.</p>
Re-imagining the Business and the Destination	<p>Through many previous crises, Jamaica has prioritized and celebrated resilience. Jamaica is currently in the process of reinventing international tourism to successfully allow for the resumption of travel and for the country to be truly at the forefront of the international recovery. It is in this vein that we have coined the destination wide response – Jamaica Cares.</p> <p>Through Jamaica Cares, we are focussed on welcoming the Gen-C travellers. These travellers are eager to get back to exploring the world but are focused on destinations that can help easily navigate new travel requirements while also prioritizing health and safety.</p> <p>In re-imaging the destination, we have placed an enormous amount of messaging and visuals on the resilient corridors as they represent our internal tourism bubble that provides a safe space for visitors and tourism workers to co-exist with less than a 1% COVID-19 positivity rate for exiting visitors who have been tested.</p>
Incentives which Attract Tourists	<p>The incentives to drive continued demand for travel and tourism to the destination are driven on a multi-tiered level.</p> <p>Product Expansion – Investors benefit from a fiscal incentive omnibus regime that provides for the expansion of existing entities and the development of new ones in the accommodation sub-sector.</p> <p>Air Seat Expansion – non-scheduled air services are the most nimble of opportunities to increase airlift to the destination, particularly from the source markets where opportunity exist but very little penetration of the brand and product.</p> <p>Coop-Marketing – represents an incentive that allows the destination to co-brand with major brands in the travel and tourism marketplace in stimulating increased demand for bookings to Jamaica.</p> <p>Sponsorships/Endorsements – incentivises key activations of the brand that aligns it with events and activities that bring heads to beds in the destination.</p>

10 Marketing Steps	Marketing Strategies Employed
Publicise the Positives	<p>The destination employs through contract, the services of professionals to act as publicists for the brand. To ensure maximum representation in our key markets, and messaging that is fit for purpose and culturally nuanced, Jamaica contracts three (3) of the best International PR firms – Lou Hammond Group (USA), Fever Pitch (Canada) and Four Communication (UK). The goal is to ensure that the destination is always messaged, portrayed and promoted positively. Equally, these firms identify new opportunities to advance the positive promotion and positioning of Jamaica in these markets.</p>
Reporting and Monitoring Progress	<p>The structure of our reporting follows the “Google Model” of reporting on:</p> <ul style="list-style-type: none"> • Audience, what is the audience profile of persons looking; • Acquisition, where are these persons coming from, by source and medium, how much time and what content are they consuming; and • Conversion metrics for which the ultimate goal is how much of the traffic is being referred to a trade partner be it travel agent, tour operator or direct to a vendor listing. <p>The foundation of digital marketing is audience demand through search data indicating intent. Search data is analysed bi- weekly informing social media content themes and website content development for organic search positioning.</p> <p>Social Media is reported on monthly while website content performance is reported on quarterly. This day-to-day performance analysis informs audience targetting, content development and channel selection for paid digital advertising.</p> <p>The goal is to drive upper funnel traffic to the JTB website via social media and display advertising, while the lower funnel traffic from Paid Search targetting travel intent keywords for Jamaica and the Caribbean is pushed to tour operators and travel agents. Again, performance is reported monthly using Google Model for Social, Display and Paid Search. Tour operator referrals are reported on weekly to maintain a consistent conversion rate.</p>

“The second leg of the conceptual framework was the employment of the Blue Ocean Strategic Planning Framework to guide Re-imagining and Building Forward Better. The underlying intention of a successful tourism recovery programme is not merely getting back to where things were before the crisis event but to Build Forward Better.”

5.2 Re-imagining Through the Blue Ocean Strategy

The second leg of the conceptual framework was the employment of the Blue Ocean Strategic Planning Framework to guide Re-imagining and Building Forward Better. The underlying intention of a successful tourism recovery programme is not merely getting back to where things were before the crisis event but to build forward better. This means a more marketable, competitive, sustainable and resilient destination, which requires new strategies and an upgrading of the tourism value chain in multiple places.

The philosophy underpinning the Blue Ocean Strategic Planning Framework is that the market space in which a destination competes is composed of two types of oceans: red oceans and blue oceans. A Blue Ocean strategy calls for the creation of business models that depart from traditional models based on competition and standardization. Blue Ocean strategies pursue enhanced value creation through product differentiation and diversification, which will allow Destination Jamaica to develop new markets and create new demand in a unique and uncontested space. Destinations need to move away from Red Oceans, where they compete against each other for a limited number of tourists, by offering low cost and standardized offerings based primarily on “Sun, Sea, and Sand.”

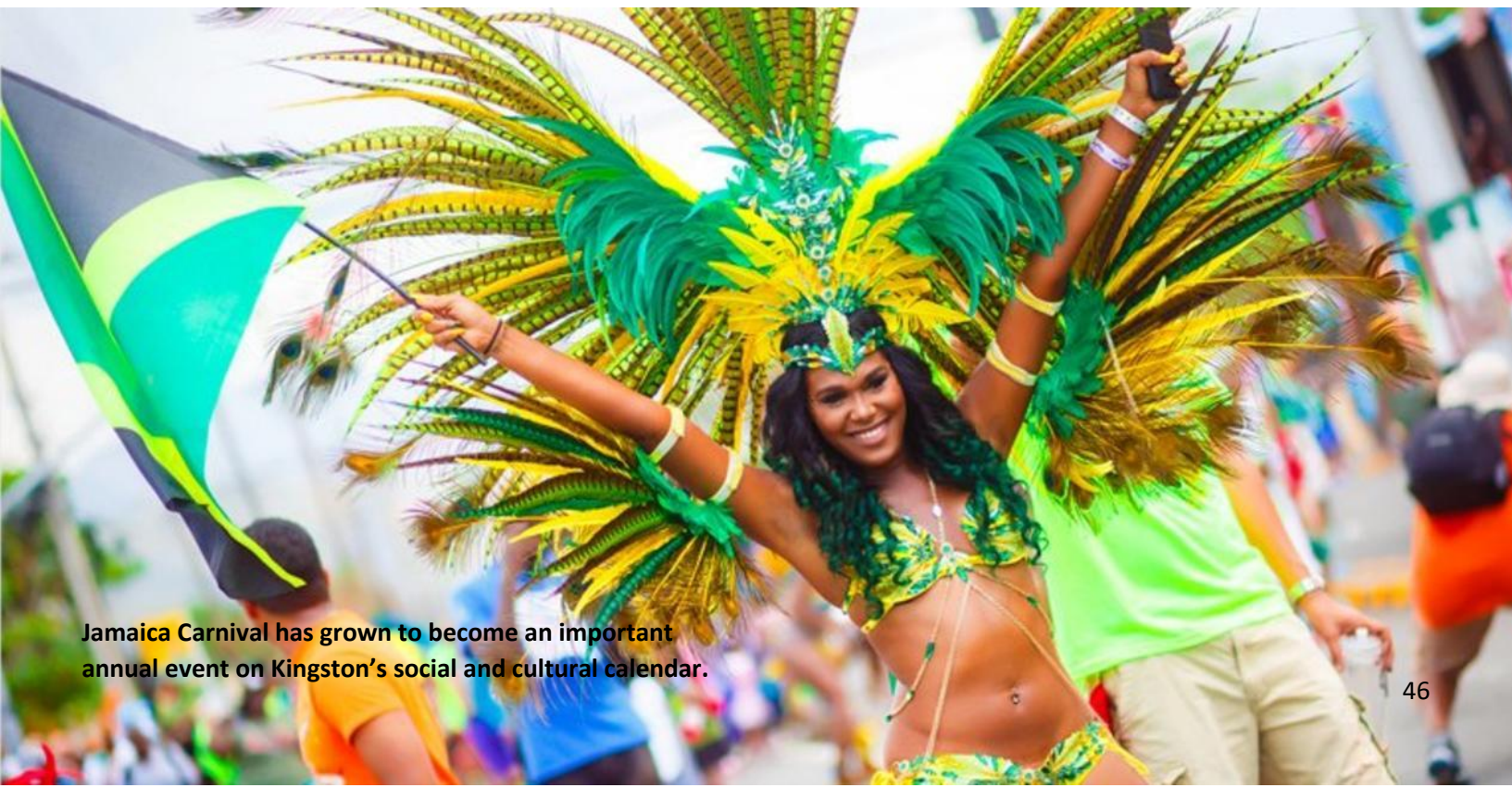
The following graphic illustrates the Red Ocean versus Blue Ocean value propositions for Jamaica:

Table 2. Red Ocean versus Blue Ocean Strategies

RED OCEAN STRATEGY Focus on Current Customers	BLUE OCEAN STRATEGY Focus on Serving Specific Niches
Compete in existing markets for the traditional leisure or business traveller who wants to travel to a warm weather destination.	Create uncontested markets to access and serve customers that previously were not even in the market for the rich and unique experiences that the destination has to offer.
Beat the competition by offering either premium products or services at high prices, or budget package experiences at discounted prices.	Make the competition irrelevant by focusing on the destination's internal capabilities and unique attributes of natural and cultural heritage, health and wellness, and urban tourism in Kingston.
Exploit existing demand for "Sun, Sea, and Sand" through aggressive mass marketing.	Create and capture new demand by leveraging through Brand Jamaica the global interest in the island's unique natural and cultural heritage.
Make the value-cost trade-off of either premium value at a high price or reasonable value for travellers at a lower price.	Break the value-cost trade-off by offering unique premium experiences at different price points to access new customers and market segments.
Align the whole system of a destination's activities with its strategic choice of either differentiation, such as Bermuda, or low cost such as Mexico or the Dominican Republic	Align the whole system of a destination's attributes with the strategic choice of differentiation at different price points. The choices would include high-end resorts, vibrant urban tourism, quaint heritage towns and villages, relaxing spa towns, pristine nature reserves, bucolic rural and community tourism, and budget homestays.

The Blue Ocean Framework offers several tools for analyzing an organization's strategic context. The four tools which were used to develop a Blue Ocean Strategy for Jamaica's tourism sector were the Six Paths Framework, the Eliminate, Reduce, Raise, and Create (ERRC) grid, the Four Hurdles to Execution, and the Strategy Canvass.

Reconstructing the market boundary is the first and foremost principle in creating a Blue Ocean Strategy for a destination. The Six Paths Framework offers six basic approaches to break out of the known market boundaries, reconstruct those boundaries and move a destination out of red oceans into blue oceans. The six paths that the Ministry examined included the following: (1) comparisons across alternative industries to consider substitutes and alternatives to Jamaica's tourism offering, (2) comparisons across strategic groups within the regional tourism industry including competition from both upmarket and budget offerings, (3) examinations across buyer groups to determine how buying decisions are made, (4) comparisons across complementary product and service offerings to see what is purchased with a vacation to Jamaica, (5) examinations across the functional-emotional orientation of an industry to understand the emotional utility a buyer receives and (5) an examination across time to determine trends that might shape the tourism industry and the decisions of travellers. Some of the considerations are summarized below in Table 3:



Jamaica Carnival has grown to become an important annual event on Kingston's social and cultural calendar.

Table 3. Six Path Framework for Re-imagining Jamaica's Tourism Sector

Step	Red Ocean Strategy	Blue Ocean Strategy
Tourism Industry	<ul style="list-style-type: none"> • Cruise as an alternative to stopover vacations • Domestic offerings in source markets as an alternative to international offerings • Vacation cottages, timeshares and RVs in source markets reduce potential visitors 	<ul style="list-style-type: none"> • Offer vacationers new, unique and compelling experiences which can be found nowhere else but in Jamaica • Extensively utilize Jamaica's unique natural and cultural heritage and incorporate high-quality products and services • Make foreign ownership of vacation property in Jamaica attractive and convenient
Strategic Groups	<ul style="list-style-type: none"> • Other countries in the region offering "sun, sea and sand" • International hotel chains offering a standardized experience • All-inclusive hotels which provide the bulk of accommodation, food and entertainment to the visitors • A limited local offering of theme and adventure parks as well as adventure tourism • A limited local offering of parks, museums and monuments • A limited offering of theatres, cabarets, night clubs and restaurants 	<ul style="list-style-type: none"> • Expand offering of EP Hotels, villas, guesthouses and peer-to-peer accommodation. • Expand offering of heritage towns and villages, theme and amusement parks, national parks, museums and monuments • Expand offering of theatres, cabarets, night clubs and restaurants outside of hotels • Expand offering of fetes, stage shows, carnivals and festivals • Introduce Integrated Resort Developments which will offer casinos, dining, shopping and entertainment
Buyer Group	<ul style="list-style-type: none"> • Fully Independent Travellers (FIT) who buy a vacation either online or through a travel agent or tour operator • General tour operators who buy in bulk at a discounted rate to sell to individuals or groups • Traditional and online travel agents who sell a variety of travel products such as accommodation, flights and car rentals • Wedding parties and organizations who buy in bulk as part of MICE segment • Vertically integrated travel and tourism enterprises have economies of scale and control over information which give them market power • Government or state agencies that issue travel advisories that influence prospective travellers • Private rating and travel advisory sites that issue ratings and advisories that influence prospective travellers 	<ul style="list-style-type: none"> • Increase direct contact with fully independent travellers through the Internet when they are doing their online research • Increase contact with specialized tour operators who cater to niche groups. • Increase the use of social media and social media influencers • Increase exposure to Jamaica through the destination being used in film and television, e.g. New Zealand and Iceland • Increase the advertising of the destination in specialist media that cater to special travellers interested in natural and cultural heritage experiences • Build an online platform for the destination to support research and the booking of accommodation, attractions, tours or transportation that better supports local tourism enterprises
Scope of Product or	<ul style="list-style-type: none"> • Travel and tourism industries increasingly integrated both vertically and horizontally (accommodation + pre-travel 	<ul style="list-style-type: none"> • Increased immersion into Jamaica's natural and cultural heritage

Service Offering	<p>planning and logistics + transportation) to offer travellers convenience and competitive prices but possibly limit consumer choice</p> <ul style="list-style-type: none"> Minimal emersion into Jamaica's natural and cultural heritage Travellers are offered generic, destination-independent discounts and incentives after they leave the destination International tourism enterprises have significant market power and economies of scale over local tourism enterprises Accommodation sector has limited offering of complementary goods and services such as attractions, shopping, sports, and knowledge 	<ul style="list-style-type: none"> Start relationship between traveller and Jamaica before they arrive and maintain after they leave the destination Increase offering of locally produced complementary products and services outside resorts Offer comprehensive medical and travel insurance and health logistics to support the health and safety of visitors Strengthen linkages between accommodation and entertainment, sports, health/wellness, knowledge, shopping, and gastronomy networks. Differentiate or theme each regional Destination Area to encourage visitors to return for subsequent vacations Strengthen portside experiences and upgrade cruise port towns to encourage the majority of cruise visitors to become stopover visitors
Functional-emotional Orientation	<ul style="list-style-type: none"> On the functional side most travellers want a safe, easy, and convenient travel experience which has high utility for which travellers are willing to pay extra On the emotional side most travellers are offered a fairly similar experience by the travel and hospitality industry which has low to moderate utility that creates an expectation of low price 	<ul style="list-style-type: none"> Make travel to Jamaica a safe, secure and seamless experience Offer more travellers more personalized and memorable experiences Make travellers feel safe and welcomed and encourage them to immerse in authentic Jamaican experiences Increase the affinity of locals for tourism, promote traditional Jamaican hospitality but balance affinity with increased inclusiveness where benefits accrue to locals
Trends Across Time	<ul style="list-style-type: none"> Consistent growth in the number of tourists and dollar value of global travel and tourism industries Over-tourism and environmental damage in some destinations Weak linkages between tourism and the rest of the economy in many developing countries Low level of inclusiveness of locals in reaping the benefits of tourism The standardization and commodification of tourism products and services, especially through multinationals Travel and tourism industries increasingly integrated both vertically and horizontally 	<ul style="list-style-type: none"> Redistribute tourism assets and infrastructure more evenly across Jamaica to reduce the environmental footprint in traditional resort areas and increase the benefits that accrue to Jamaicans Increase linkages between tourism and the rest of the economy by integrating the tourism value chain into other value chains Increase inclusiveness of tourism industry by upgrading the local tourism value chain to expand tourism support and tourism supplying sectors

The Eliminate, Reduce, Raise, Create (ERRC) grid is another well-established tool that has proven to be successful in various industries including tourism. It has been used to identify initiatives which allow for the creation of new and uncontested market segments. The ERRC grid, in the context of the Jamaica tourism sector, has identified several areas for transformation and restructuring as follows:



- **Eliminate.** The Blue Ocean framework requires the elimination of factors in a destination that are not value-enhancing. Visitor harassment and poor solid waste practices have been long-standing stains on the destination and Brand Jamaica and are an example of what must be eliminated. This dimension of the Blue Ocean framework is encapsulated in Outcomes 1, 7 and 8 and an example of a strategy to address this problem includes the creation of a programme for re-socialization and skills upgrading of informal vendors, touts and vagrants and the implementation of such measures to empower them to earn a living in the formal economy.

- **Reduce.** The Blue Ocean framework requires the reduction of factors in a destination which are limited in their capacity to enhance value. Foreign exchange leakages and the environmental footprint of the sector are two factors which need to be reduced. The dimensions of the Blue Ocean framework related to reduced leakages are encapsulated in Outcomes 2, 3, 5, and 6, and an example of a strategy to address this is the Linkages Programme. The dimension related to the environmental footprint is encapsulated in Outcome 1, and an example of a strategy to address this are projects to reduce the volume of the waste stream by encouraging the stakeholders in Destination Areas to practice the 3-R's.
- **Raise.** The Blue Ocean framework requires the raising of existing factors in a destination that are value-enhancing. Human capital, innovation, and visitor satisfaction are three factors that are important to destination competitiveness. High-quality human capital is required to produce and deliver tourism products and services that meet the expectations of visitors; while high-quality tourism infrastructure is required to ensure the operational efficiency of tourism enterprises and destinations. The dimension of the Blue Ocean framework related to human capital is encapsulated in Outcome 4, and an example of a strategy to address this factor can be found in the ongoing work of the Jamaica Centre of Tourism Innovation (JCTI), which recently introduced a series of online courses to help tourism workers up-skill or resettle those furloughed as a result of COVID-19. The dimension of the Blue Ocean framework related to innovation is encapsulated in Outcome 5, and an example of a strategy to address this factor is the creation of a tourism incubator to nurture local entrepreneurs and raise the level and sophistication of innovation. The dimension of the Blue Ocean framework related to visitor satisfaction is encapsulated in Outcome 8, and an example of a strategy to address this factor is the ongoing development of the Destination Assurance Framework and Strategy. Destination Assurance is a propriety tourism quality assurance framework that will provide the institutional and governance systems to ensure that tourism enterprises and resort destinations meet requirements for quality, safety, security, business continuity, environmental sustainability and destination governance.

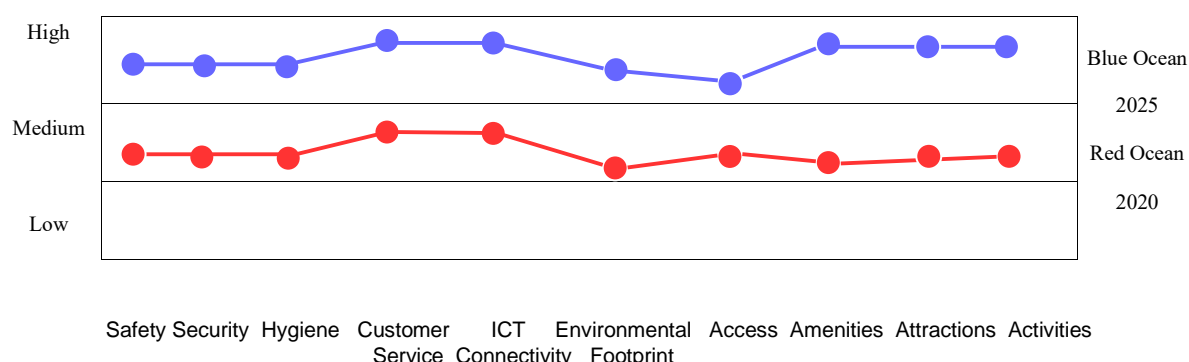
- **Create.** The Blue Ocean framework requires the creation of new factors in a destination that offer new sources of value. New products and experiences, especially those based on Jamaica's unique natural and cultural heritage, are factors which are critical to the creation of an uncontested market space and thus to destination competitiveness. These products and experiences will require targeted investments and they provide an opportunity to bring more Jamaicans into the tourism value chain as producers. The dimension of the Blue Ocean framework related to new products is encapsulated in Outcome 2 and an example of a strategy to address this is through the facilitation of investments in developing and constructing artisan villages, heritage towns and trails, parks, botanical gardens, nature reserves, community tourism experiences, managed public spaces for walking, and themed destination areas which seek to brand the unique attributes of different regions of Jamaica.

The Blue Ocean framework also requires strategies to overcome barriers to implementation and identify and leverage critical success factors that facilitate the efficient implementation of key programmes and projects. This involves:

- (a) the development and updating of policies and legislation to provide a road map for the Blue Ocean framework, guide decision-making and streamline processes and procedures;
- (b) the building of institutions and the capacity for governance, especially in Destination Areas;
- (c) the management of change to facilitate and achieve the successful implementation of the restructuring and transformation of the tourism sector; and
- (d) the creation of an enabling organizational culture that ensures a well-managed and world-class destination.

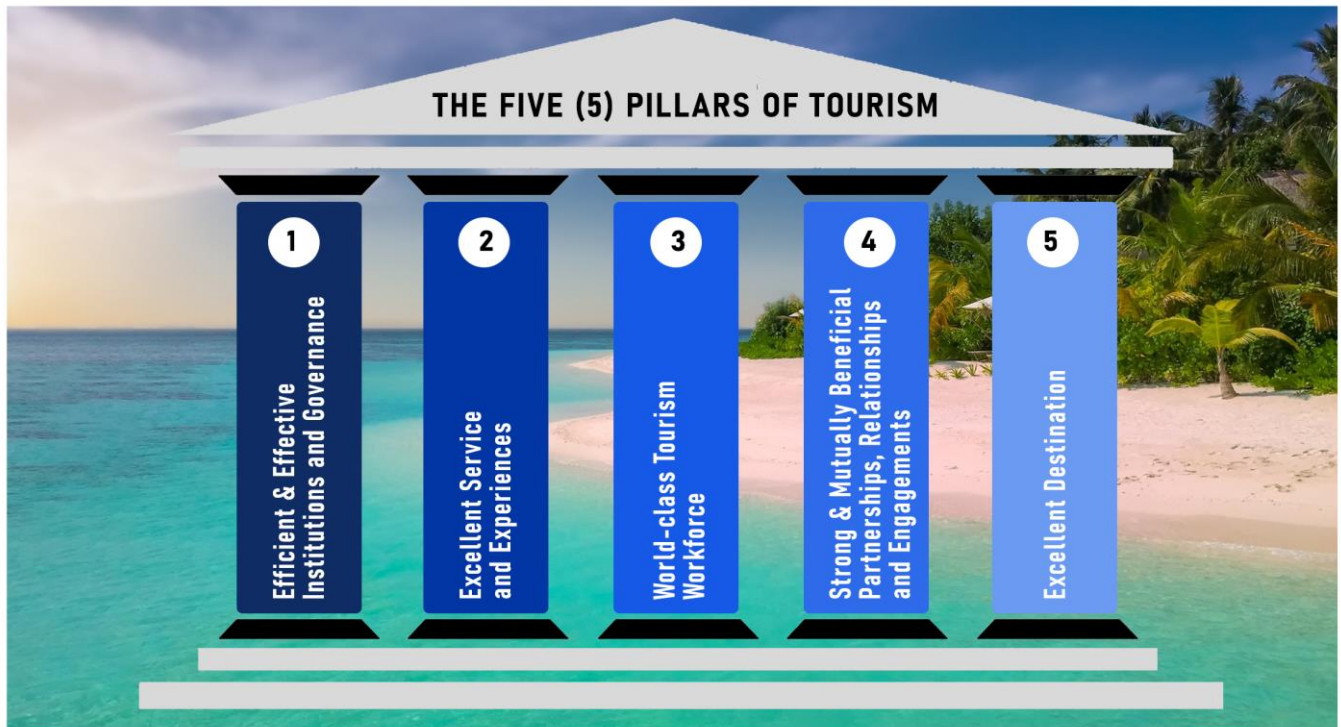
Below, in Figure 7, is a Strategy Canvas showing ten areas in which the Ministry of Tourism will seek to improve performance during the next medium-term planning cycle using the Blue Ocean framework. The red line represents Jamaica's current standards in these areas and the blue line represents where we would like to raise the standards to.

Figure 7. Strategy Canvas for Re-imagining Jamaica's Tourism



5.3 STRATEGIC PILLARS

Underpinning the entire strategic framework are five Strategic Pillars or Themes and 38 sub-pillars, which the Ministry of Tourism uses to anchor its strategy over the long term. This represents the third leg of the strategic framework. The Pillars of Tourism are cross-functional and cross-organizational in nature and represent relatively stable areas in which the destination must excel if it is to achieve its goals. The Pillars are based on a core set of internationally recognized and accepted elements which make destinations competitive, attractive to visitors and investors, and inclusive to the widest cross-section of tourism stakeholders. The Pillars also allow us to benchmark Jamaica against other destinations to identify areas of comparative strength and weakness. These Pillars of Tourism ensure that the Ministry's Blue Ocean Strategy for Re-imagining Jamaica's Tourism remains grounded in the generally accepted tourism principles and best practices that deliver a well-governed, resilient, sustainable, innovative and inclusive tourism sector. This four-year strategic plan includes 10 outcomes, and 25 objectives and many initiatives that will directly impact 21 of the 38 sub-pillars, for which responsibility will be distributed across the Ministry and its public bodies. It is important that these sub-pillars be continually strengthened or upgraded for the destination to remain globally competitive.



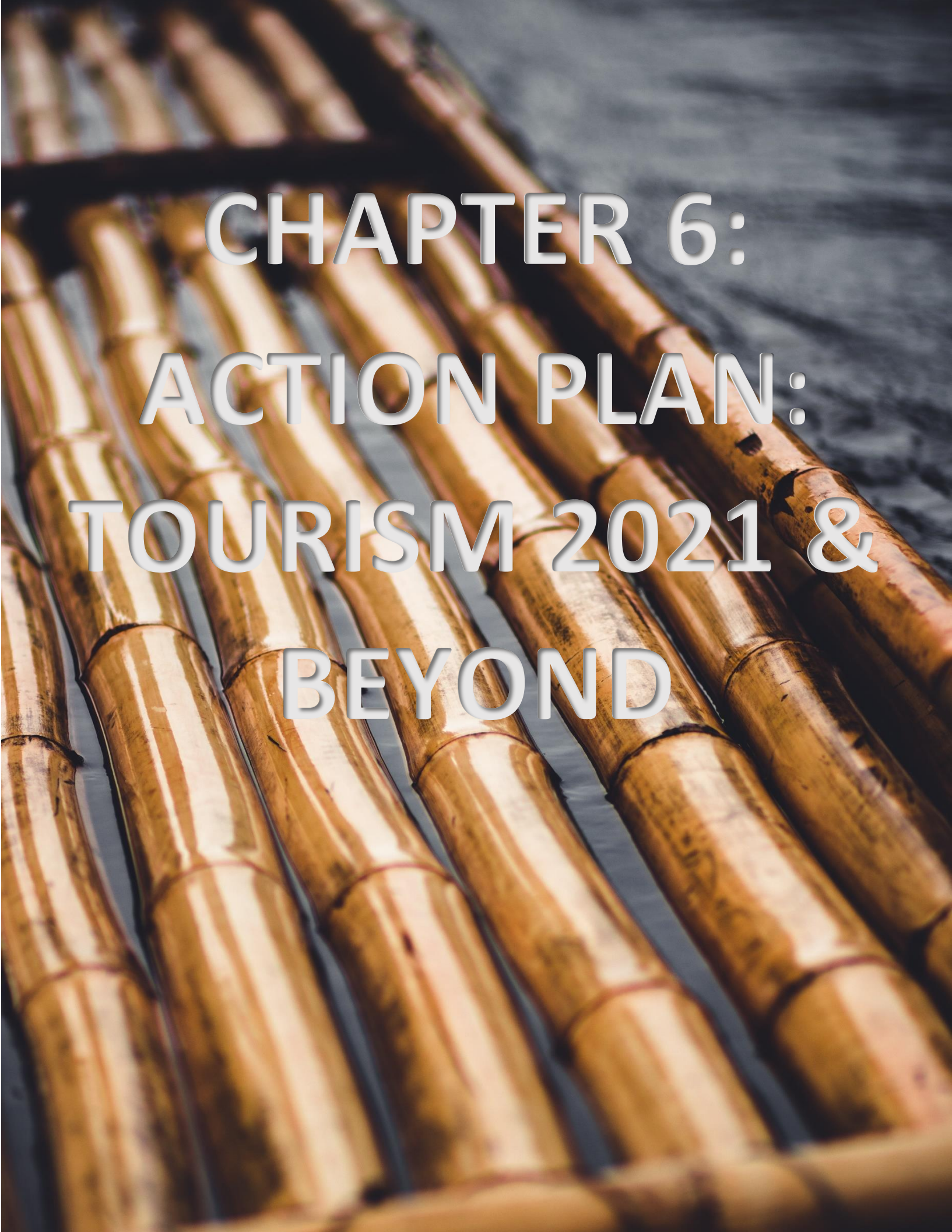
Below are definitions for each of the **5 Pillars of Tourism**:

- **Pillar 1: Efficient & Effective Institutions and Governance.** Jamaica will create an institutional framework for tourism that delivers a resilient destination that can weather the existing and emerging shocks and stresses that the tourism sector faces on an ongoing basis. A resilient destination must also be able to grow to support national development and offer investors a reasonable return on their investment. A resilient destination therefore requires effective, efficient and transparent government, and clear and enabling policies, that support broad-based, balanced and equitable social and economic development while protecting the environment, culture and natural heritage of Jamaica for future generations.
- **Pillar 2: World-class Tourism Workforce.** Jamaica will recruit, train and retain an efficient and motivated labour force that learns and adapts, demonstrates a strong work ethic with a customer service orientation, is proficient in the uses of information technology, innovative and entrepreneurial, and able to operate in a global and multi-cultural environment.

- **Pillar 3: Excellent Service and Experiences.** Jamaica promises to deliver to visitors a safe, secure and seamless experience, which will encourage visitors to return and recommend the destination to others.
- **Pillar 4: Strong & Mutually Beneficial Partnerships, Relationships and Engagements.** Collaboration among tourism stakeholders must take place in an environment of trust, transparency and accountability that delivers real value through the creation of mutual benefits that are equitably distributed.
- **Pillar 5: Excellent Destination.** Sound physical and tourism service infrastructure is indispensable for the development of an enjoyable, resilient, sustainable and smart tourism destination as a pillar of the economy. This will be achieved through ongoing comprehensive destination planning to ensure the availability and continuous improvement of quality infrastructure.

A complete diagram showing the 5 Pillars of Tourism and its various sub-components is attached as Annex B.

A destination's business model helps stakeholders understand the existing ways a destination does business and how its network of actors sustainably creates and captures value. It also helps stakeholders to conceive and document the strategic, innovative and entrepreneurial elements required to re-imagine the destination's framework for the creation and capture of value in the future as existing business models lose their competitive power. Jamaica's tourism business model for the first two decades of the 21st century could be described as investment driven and accommodation-focused, designed to provide high-quality accommodation to a globally growing market from which Jamaica benefitted. Our new business model will emphasize differentiation to set Jamaica apart from other warm-weather destinations. There will be differentiation in accommodation with a choice of styles and price points; there will be differentiation in attractions and activities based on innovative products and experiences built upon our natural and cultural heritage; there will be differentiation in shopping as more of what is offered for sale is designed and produced in Jamaica. To ensure that more of the benefits remain in Jamaica, the tourism value chain will be upgraded and the linkages to tourism supplying and support sectors will be strengthened.

A close-up, low-angle shot of several bamboo poles floating on a body of water. The poles are arranged diagonally from the bottom left towards the top right. They have a warm, golden-brown hue and show natural textures like nodes and slight imperfections. The water is dark and slightly rippled, providing a contrasting background for the light-colored bamboo. The overall mood is serene and natural.

CHAPTER 6: ACTION PLAN: TOURISM 2021 & BEYOND

“This plan is primarily designed to meet the requirements of the next four years of the government’s MTF for FYs 2021-2025. The plan will be executed in three phases: the first two phases fall within the MTF and address Bouncing Back in the short term and Re-imagining in the medium term; and the third phase looks at the long term and addresses Building Forward Stronger to take the sector up to 2030.”

6.0 ACTION PLAN: TOURISM 2021 & BEYOND

The Action Plan for Tourism 2021 and beyond will inspire and focus stakeholders to implement this strategic plan over the four years of the government's Medium-Term Strategic Planning Cycle (MTF).

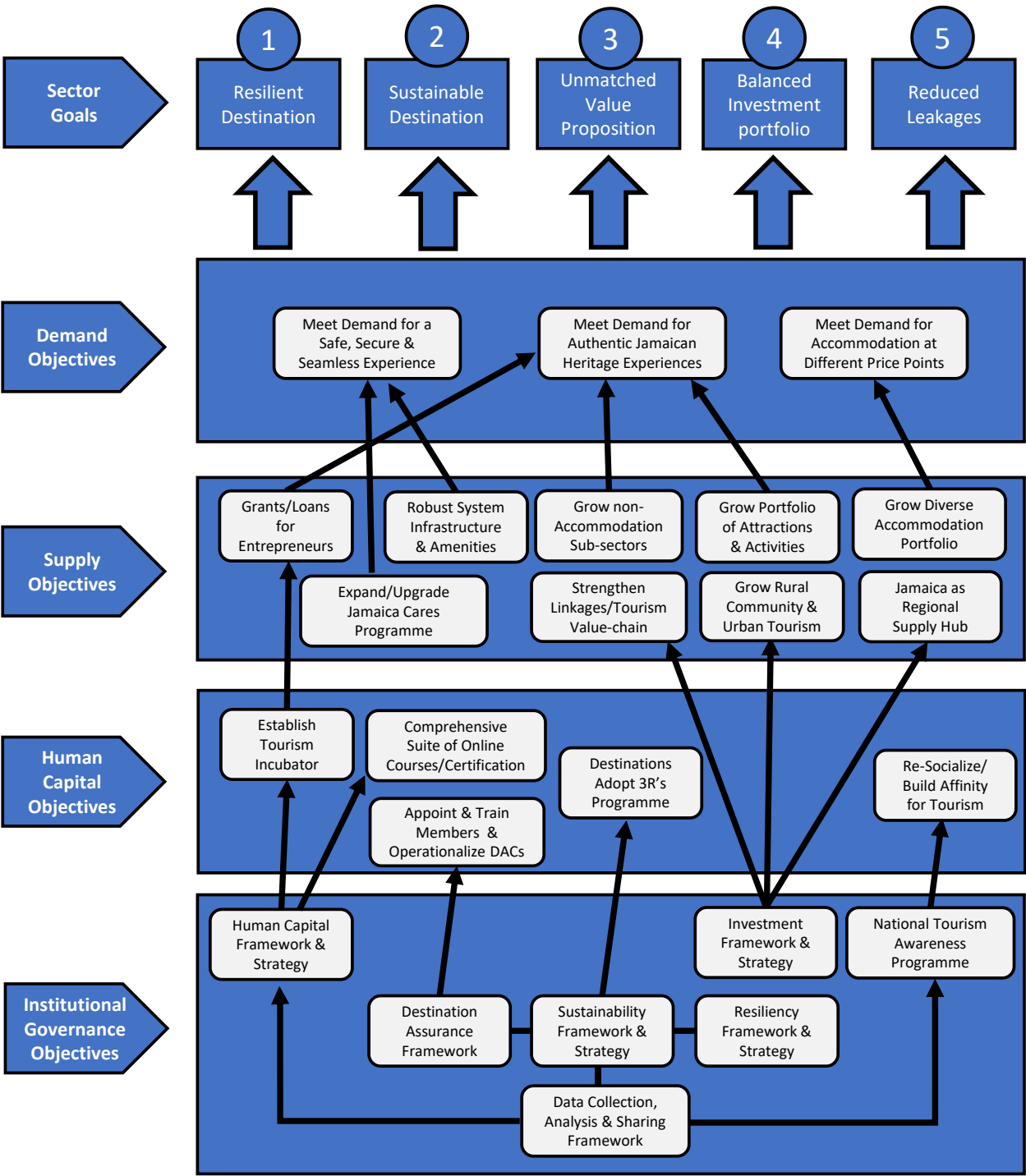
Short-term initiatives in years one and two focus on building back tourism to pre-COVID-19 levels of performance.

Medium-term initiatives in years three and four focus on the transformation of the tourism sector to offer innovative and differentiated products that provide unparalleled experiences to visitors. Key to this includes initiatives to upgrade the tourism workforce to serve visitors in an increasingly globalized and technologically driven paradigm, restructure the tourism value chain to create and capture more value through increased linkages between tourism enterprises and local tourism supply and tourism support sectors, and an expansion of tourism sub-sectors such as attractions, gastronomy, entertainment, education and sports.

The foundation laid during the MTF will facilitate the transformation of the destination in the long term, which will take place in years 5 and beyond up to 2030. It is during the long term that major new investments will take place that will reinforce Jamaica’s unique offerings and its status as the world’s leading warm-weather destination.

Below is the **Strategy Map**, which maps the four components of the **Strategic Framework** to the goals and objectives of the plan:

Figure 8. Strategy Map Linking Components with Strategic Objectives

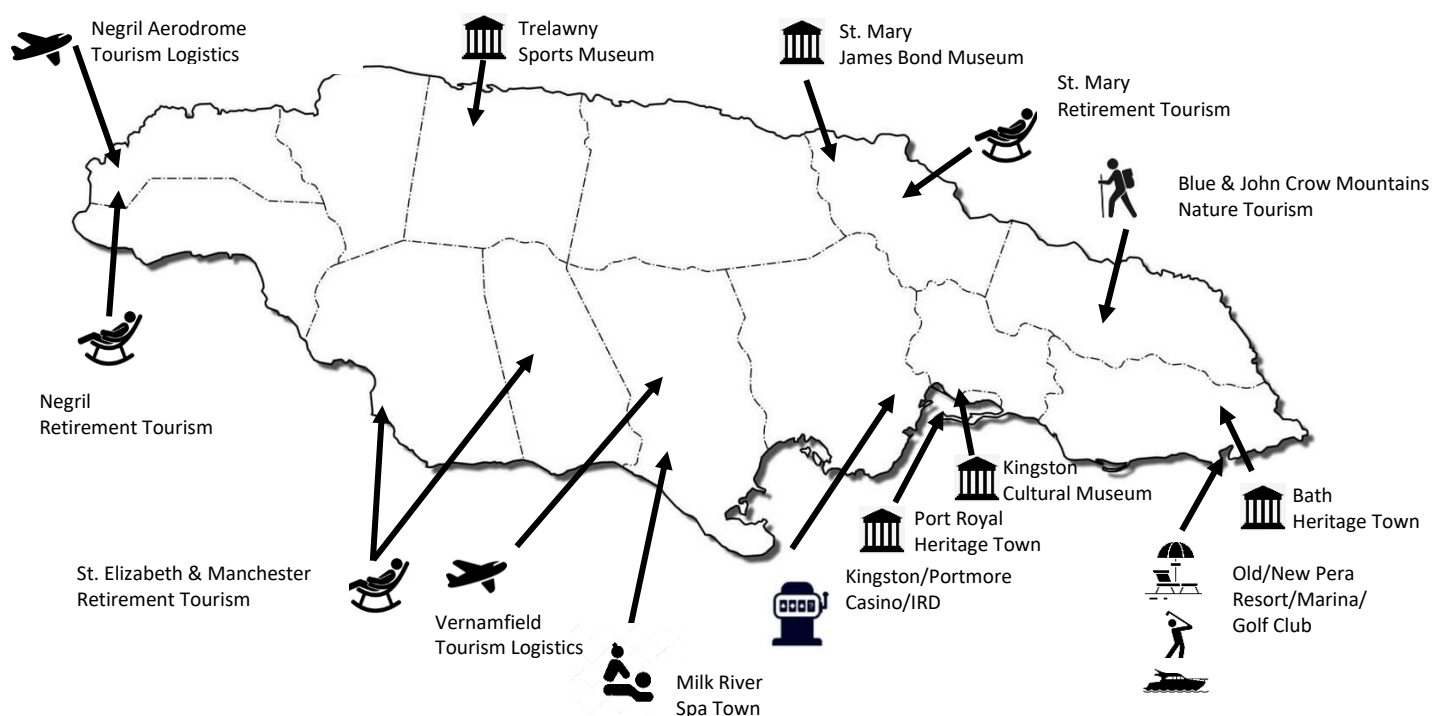


The Action Plan below sets out the objectives to be achieved in the short, medium and long term.

Objectives	Short-term Years 1 & 2	Medium-term Years 3 & 4	Long-term Years 5 to 10
DEMAND OBJECTIVES			
Meet demand for a Safe, Secure & Seamless Experience			
Meet Demand for Authentic Jamaican Natural & Cultural Heritage Experiences			
Meet Demand for Accommodation with Different Offerings at Different Price Points			
SUPPLY OBJECTIVES			
Provide Grants & Loans for Innovators & Entrepreneurs			
Robust System of Infrastructure & Tourism Amenities			
Expand & Upgrade Jamaica Cares Programme			
Linkages Network to Upgrade Value Chain			
Grow Portfolio of Attractions & Amenities			
Grow Non-Accommodation Tourism Sub-Sectors			
Grow Rural, Community, & Urban Tourism			
Grow Diverse Accommodation Portfolio			
Jamaica To become Regional Hub with Tourism Supplying & Tourism Support Sectors to become Leading Exporting Sectors			
HUMAN CAPITAL OBJECTIVES			
Establish Tourism Incubator			
Establish Comprehensive Suite of Online Tourism Courses & Industry Recognized Certification			
Appoint & Train Members & Operationalize the Destination Assurance Councils (DACs)			
Destinations to Adopt Systems and Practices for Reduce, Reuse, and Recycle			
Roll-out Programmes to Re-socialize Citizens to Reduce Harassment and Increase Affinity for Tourism			
INSTITUTIONAL & GOVERNANCE OBJECTIVES			
Develop & Implement Data Collection, Analysis & Sharing Framework & Strategy			
Develop & Implement Destination Assurance Framework & Strategy			
Develop & Implement Human Capital Framework & Strategy			
Develop & Implement Sustainability Framework & Strategy			
Develop & Implement Resiliency Framework & Strategy			
Develop & Implement Investments & Incentives Framework & Strategy			
Develop & Implement Tourism Awareness Framework & Strategy			

6.2 POSSIBLE LOCATION OF BLUE OCEAN INVESTMENT OPPORTUNITIES

Figure 9. Tourism Investment Map of Jamaica



6.3 BUSINESS CASE FOR FLAGSHIP BLUE OCEAN PROJECTS

Historically, cities were the main destination for travellers and today urban tourism is once again on the rise. Kingston is not currently a leading destination in Jamaica but it potentially has much to offer visitors. It is the political, cultural, and commercial heart of the country. Urban tourism offers visitors a broad and heterogeneous range of cultural, architectural, commercial, social and natural experiences and it is only likely to grow in importance as the world becomes more urbanized. Kingston offers museums and art galleries and other historic sites to visit; there are nightclubs and places to eat; there are craft markets and malls for shopping; there are churches and synagogues in which to worship; and there are plays, festivals, carnivals, and sporting events to attend throughout the year. Urban tourism has also become a major driver of urban renewal, beautification, and sustainable development. Urban tourism has the potential to positively impact the lives of Kingston's citizens as well as visitors through employment, improved

infrastructure and amenities, and urban redevelopment. Kingston has been selected as one of three locations for an Integrated Resort Development (IRD). Its proximity to the Norman Manley International Airport, the Kingston Harbour, and an improving network of highways make this logistically feasible. What Kingston lacks in space could possibly be compensated for by utilizing nearby land in Port Henderson. This 3.2-kilometer strip along Fort Augusta Boulevard could be developed into an IRD at scale with hotels, casinos, nightclubs, restaurants, shopping, and marinas, and it is adjacent to the causeway bridge, with relatively easy access to the Jamaica Conference Centre and the National Stadium. The location is also close to Jamaica's two largest population centres with over a million residents who could serve as both a ready workforce and a local market for tourism services.

Museums and historic sites are an important element in the supply side of a destination. Museums represent part of the patrimony of a community and contain cultural elements that are an important factor in differentiation and destination development. They allow a community to proudly display and preserve their history for both visitors and their posterity. Museums are a means of getting large numbers of visitors closer to the culture and heritage of a destination, they provide an effective means of education and learning, and they are a great family or group activity. Museums can facilitate urban redevelopment, serve as community centres and places for scholarship or professional development, and places to host shows, book signings or festivals.

Cultural tourism is a growing market segment and iconic, attractive, and informative museums can draw visitors who are interested in exploring a destination beyond the traditional resort setting. Jamaica has been criticized as lacking marquee attractions and museums could fill that need. Three museums have been proposed during extensive stakeholder discussions: a James Bond Museum in St. Mary, to showcase Jamaica's link to the fictional character, the author, and the movie franchise; a Sports Museum in Trelawny to showcase Jamaica's international successes in sports and the inspiring lives of our sportsmen and women who are some of our premier ambassadors; and a Music and Culture Museum in Kingston to showcase our capital as a UNESCO World Heritage Site for music and the birthplace of Reggae. These museums will not only be physically

and visually impressive but immersive and interactive. Visitors will be able to play cricket or netball, run against a hologram of Usain Bolt, Shelly-Ann Fraser-Pryce or Elaine Thompson-Herah, watch one of Bob Marley's concerts, or listen to Louise Bennet and Mutabaruka recite their poems.

Health and wellness tourism covers a range of activities that include wellness and spa tourism, convalescent and addiction treatment, retirement communities, and some alternative health services. Jamaica has a long relationship with the cultural, spiritual, and scientific aspects of health and wellness that make this form of tourism a good fit for the island. Jamaica is also blessed with numerous mineral springs, most famous among them being Milk River in Clarendon and Bath in St. Thomas. Health and wellness tourism is a growing segment of the international tourism business and Jamaica needs to formally and aggressively capture a share of this market. Health and wellness tourism also has the potential for lucrative synergies with the cosmetic, cosmeceutical, and nutraceutical industries which would strengthen Jamaica's manufacturing, research and development, and scientific sectors.

Jamaica has several locations for heritage towns, chief among them are Falmouth, Port Royal, and Bath in St. Thomas. Heritage towns normally have their own unique character and are therefore of special interest to visitors. Some heritage towns focus on history or culture, while others focus on unique local architecture. They may also be the site of a famous festival or a place for religious pilgrimage. The town of Bath in St Thomas was identified in the St. Thomas Tourism Destination Development and Management Plan as a potential Heritage Town because of its famous mineral spring, its historic botanical gardens, and it being home to the Giant Swallowtail Butterfly, the second largest butterfly in the world. Bath was for centuries a Spa Town for Jamaica's elite although in the 20th century it has unfortunately become a backwater. The botanical gardens are the oldest in the region and was the place Captain Bligh brought the breadfruit and Otaheite apple from Tahiti. Many of Jamaica's fruit trees entered Jamaica through this garden before entering into the country's gastronomic culture and cuisine. The project would entail building a gastronomy museum, a rest stop, a butterfly and reptile sanctuary, upgrading

the streetscape, developing heritage trails, and re-establishing the annual breadfruit festival.

One of the most innovative programmes is the reimagining by TEF of Jamaica's public beaches. This programme is already underway and will target 10 beaches over the next 3 – 4 years. This initiative involves adopting a new and more sustainable business model for the development and upkeep beaches that will see concessionaires granted to entrepreneurs to provide services to patrons. This model will generate funds for the maintenance of the facilities, stimulate local economic development, support community and rural tourism, and ensure free public access to the beach. The beaches will be substantially upgraded with parking facilities, security, change rooms and lavatories, playgrounds, picnic tables and benches, and gazebos. Each beach will be themed based on local characteristics, such as the geography or history of the region. Some of these beaches have been featured in films over the years which cements their place in popular culture. Where beaches possess a river, stream or other such natural feature, these will be integrated into facility to enhance the overall experience. These facilities will be accessible to both locals and visitors and it is expected that they will become memorable for sharing via postcards or social media.

Figure 10. Artist's rendition of a 'reimagined' beach with upgraded facilities and unique theme





CHAPTER 7: CONCLUSION

Flora and Fauna are an important part of Jamaica's natural heritage which will become an increasingly important part of the products and experiences offered to visitors. Jamaica is blessed with many endemic species that would excite researchers, naturalists, and conservationists. The destination also has several botanical gardens, and the Blue and John Crow Mountains National Park is a UNESCO designated World Heritage Site

7.0 CONCLUSION

The Tourism Beyond 2021 Strategic Plan is designed to help the Jamaican tourism sector to bounce back from COVID-19, reset to make it more resilient, sustainable and competitive, and build forward stronger to make it the world's premier warm weather destination, offering unique experiences. Building back will be achieved by the application of a Tourism Risk and Crisis Management Framework, and Re-imagining and Building Forward Stronger will be achieved by the application of the Blue Ocean Strategic Planning Framework. This plan aligns with the next four years in the government's medium-term strategic planning framework.

The first two years of the Ministry's plan covers the strategies and initiatives to build back tourism and return the sector to its pre-COVID-19 performance with arrivals and economic returns. This expectation is predicated on the international health and travel protocols that will support the resumption of global travel coupled with the pent-up demand and propensity to travel. The health and safety protocols and the Jamaica Cares programme are key elements of the rebuilding strategy. The third and fourth years cover the strategies and initiatives to reimagine the tourism sector on the path to sustained growth and for Jamaica to become the world's premier warm weather destination. This expectation is predicated on stronger partnerships between the Government of Jamaica and the private sector being formed to build out the destination's infrastructure and upgrade the attractions, amenities and aesthetics. During this period, the application of the strategy will also result in the restructuring of the value chain, through enhanced tourism linkages, to enable more local participation in higher value-added activities.

Over the next five (5) to ten (10) years, the tourism sector will diversify its offering to reposition the destination into an uncontested market space with unique products and experiences, which its competitors cannot duplicate. This will include the development of heritage towns and trails, museums and other cultural assets, community tourism attractions outside traditional resort areas, botanical gardens and nature reserves, and managed walkable spaces. This approach supports the growing trend for visitors to have multiple experiences in one visit and to seek experiences beyond the traditional vacation based on "sun, sea and sand."

Also, over the long term, a vital component of the blue ocean strategy will be to strengthen the systems for tourism zoning and theming, so that the unique characteristics of each of Jamaica's seven regional Destination Areas will be preserved and enhanced to support their own distinct brand appeal. The zoning initiatives will also facilitate the engagement of investors for both green-and-brown field investments for the expansion and diversification of accommodations and attractions. Finally, given the destination's experiences with pandemics and natural disasters, and the threats from climate change, the systems for risk and crisis management, resilience, and sustainability will be strengthened to make Jamaica's tourism sector viable into the distant future.

Therefore, the current medium-term strategic framework will create the world's premier warm weather destination. It will achieve this by being the most resilient and sustainable destination, by offering products and services that are unique and authentic, and assuring visitors to its shores that they will have a safe, secure and seamless experience from start to finish.

A vibrant tropical beach scene. In the foreground, a sandy beach curves along the bottom left. Several palm trees with lush green fronds are scattered across the left and center, their long, slender trunks leaning towards the right. The background features a clear, bright blue sky and a deep blue ocean with white-capped waves breaking near the shore. The overall atmosphere is serene and idyllic.

APPENDICES

APPENDIX 1: CONCEPTS AND DEFINITIONS

Resilience. According to Goodwin (2019), resilience means the ability of a system to recover quickly from shocks or stresses, to bounce back or recover from misfortune or disaster, and to retain their integrity as a system. Tourism enterprises and destinations face resilience challenges, and they need to be both proactive and adaptive. Some of the key sources of stress or shocks to tourism destinations include over-dependence on one source market or company, economic recession, over-dependence on tourism, epidemics and pandemics, extreme weather, earthquakes and tsunamis, climate change and rising sea levels, man-made and technological disasters, pollution, over-tourism, crime and terrorism.

Sustainability. According to the World Tourism Organization, sustainable tourism is “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities” Sustainable tourism destination should make optimal use of the environmental resources that constitute a key element in tourism development, respect the socio-cultural authenticity of host communities, ensure that tourism enterprises maintain viable, long-term economic operations, and tourism sector is inclusive and provides an equitable distribution of socio-economic benefits to all stakeholders.

Generation COVID (GEN-C). GEN-C travellers share the collective mindset of living through the COVID-19 pandemic. GEN-C travellers have expectations that have been shaped by the health and safety risks of the pandemic, the requirements for social distancing and enhanced hygiene, the requirements for testing, quarantines, and vaccines to travel, and the psychological impacts of lock downs which builds demand for escape and exploration. GEN-C travellers are eager to get back to exploring the world and are planning trips with a focus on the destinations that can help them navigate new travel requirements while also prioritizing their health and safety.

Jamaica Cares. Jamaica Cares is a destination-wide response to COVID-19 designed to assuage GEN-C concerns, instilling confidence for booking, and ensuring seamless implementation of Jamaica's extensive health protocols and safety measures.

Destination Assurance. According to the Destination Assurance Framework & Strategy, Destination Assurance is a brand promise to visitors that assures an authentic, safe and seamless experience which is respectful towards the community and environment.

BEST Cash. The Business Employee Support and Transfer of Cash (BEST Cash) was designed to aid eligible registered tourism entities with monthly payments for each employee retained after March 10, 2020 until December, 2020.

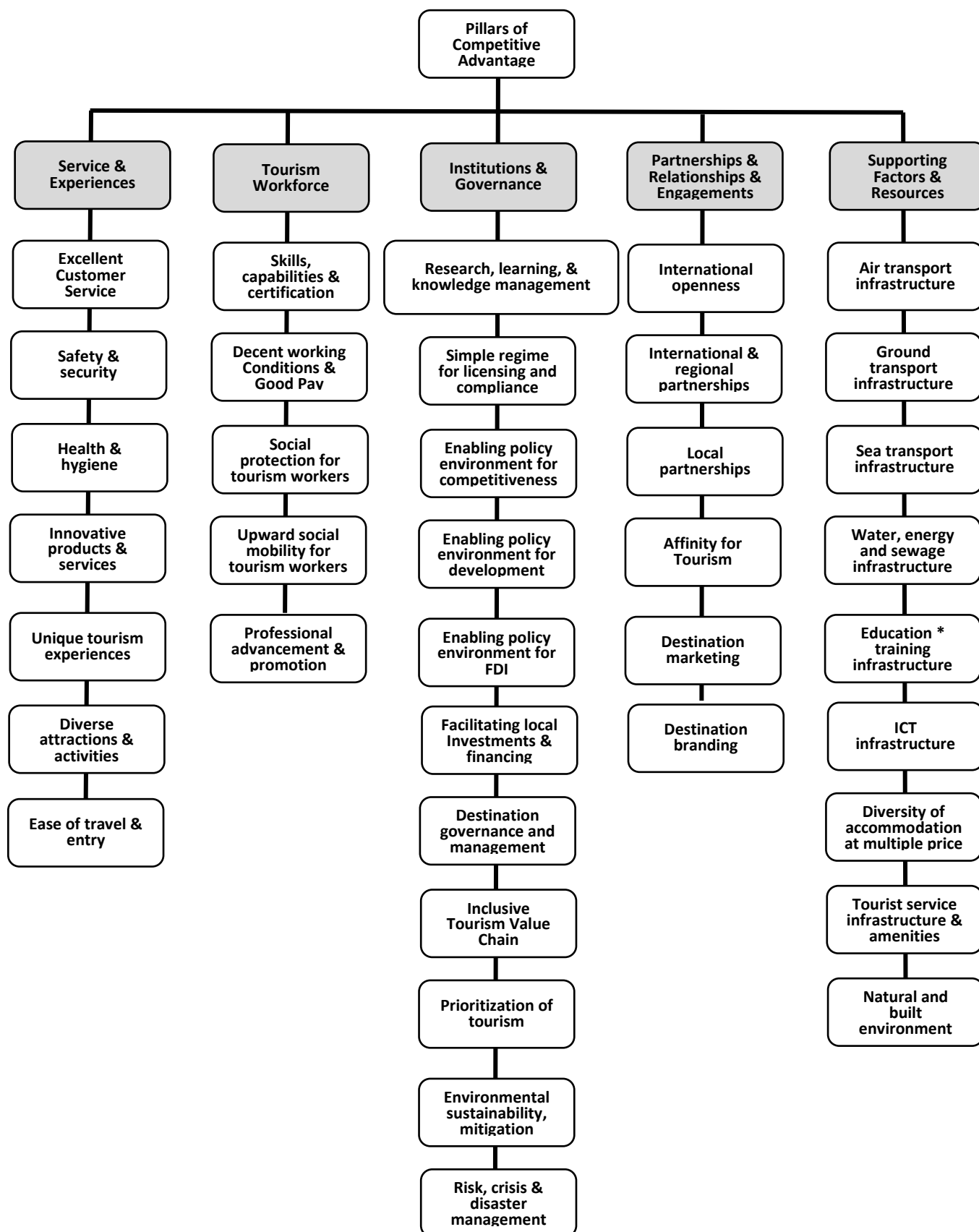
SET Cash. The Supporting Employees with Transfers of Cash (SET Cash) was designed to aid eligible tourism workers with monthly payments who were laid off after March 10, 2020 until December 2020.

General Grant. The General Grant was a one-off payment in 2020 to craft vendors and ground transportation providers.

Tourism Grant. The Tourism Grant was a one-off payment to JTB licensed small-and-medium tourism enterprises with a maximum annual revenue of J\$500 million, such as accommodation, attractions, tour companies, travel agencies, etc.

Small Business Grant. The Small Business Grant was a one-time payment to small businesses with a maximum annual revenue of J\$50 million, including tourism enterprises.

APPENDIX 2: DIAGRAM OF THE TOURISM PILLARS



APPENDIX 3: DETAILED ACTION PLAN

ACTION PLAN

Medium Term Strategic Framework for Fiscal Years 2021-2025

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
Increased Resilience of Tourism Sector	To implement a Resilient Tourism Framework & Strategy	A resilient tourism sector will be a key goal of the Ministry's strategy for the sector. The tourism sector is vulnerable to both natural and man-made	Ministry to develop and implement Resilient Tourism Strategy & Framework	% of tourism enterprises with Business Continuity Plans	Resilient Tourism Strategy & Framework completed	Environmental Conservation & Coastal Management Plan Developed for St Thomas	Environmental Conservation & Coastal Management Plan Developed for Ocho Rios	Environmental Conservation & Coastal Management Plan Developed for Montego Bay
	To implement a Sustainable Tourism Framework & Strategy	hazards that requires planning and preparation to mitigate the impacts. The tourism sector therefore needs a policy framework that encourages and facilitates tourism enterprises to address risks, reduce their exposure, and bounce back from disruptions.	Ministry to conduct Disaster Risk Assessments for each Resort Destination and help DACs develop local Disaster Management Plans.	% of Resort Destinations with disaster plans	Sustainable Tourism Strategy & Framework completed			
	To implement 3R's Programme across all Destination Areas	The tourism sector also has a significant impact on the natural environment and the natural environment is a key part of the product offering and experience. Visitors consume a greater amount of water and energy and produce more solid waste than locals and tourism development damages or	Ministry to assist tourism enterprises strengthen Business Continuity Planning	% of Resort Destinations with environmental plans	Online platform for risk management training and the preparation of BC plans developed and launched	Waste management & Vector Control strategy implemented in St Thomas	Waste management & Vector Control strategy implemented in Ocho Rios	Waste management & Vector Control strategy implemented in Montego Bay
			Ministry to develop and implement Sustainable Tourism Strategy & Framework	# of litres of water used per visitor	Risk/hazard assessment of St Thomas	Risk/hazard assessment of Negril	Risk/hazard assessment of Ocho Rios	Risk/hazard assessment of Montego Bay
			TPDCo to implement	# of Kwh of electricity used per visitor	Environmental Conservation & Coastal Management Plan developed for Negril	Risk/hazard plan for St Thomas implemented	Risk/hazard plan for Negril implemented	Risk/hazard plan for Ocho Rios implemented
				# of Kgs of waste produced per visitor				
				% of the waste stream recycled				

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
		puts a strain on natural ecosystems. Reef protection and management of coastal ecosystems are also an important component of any conservation plans and projects. The environmental footprint of tourism must be reduced to make the sector sustainable, resilient, and climate change proof.	Environmental Conservation Management Plans for each Resort Destination TPDCo to implement Waste Management & Vector Control Plans for each Resort Destination TPDCo to create an inter-agency framework for cooperation in planning and implementation of environmental projects		Waste Management & Vector Control strategy implemented in Negril			
Increased offering of natural & cultural heritage experiences	To establish a balanced portfolio of tourism attractions and activities by 2030 that utilize Jamaica's natural and cultural heritage To increase the number of licensed and	The quantity, quality, and variety of cultural and heritage experiences needs to be increased. Several of the natural and cultural heritage attractions should be world-class, marquee, and iconic and offered at scale. These attractions will include museums, artisan villages, heritage trails, parks and botanical gardens, and heritage towns.	TPDCo to create an inventory of all attractions and activities TEF to prepare a Business Case to determine the commercial viability of all attractions and activities TEF to employ	# of new natural and cultural heritage products commercialized by 2025 % of new tourism investment in Attractions, Activities, Sports & Entertainment Tourism Investment &	Launch of St Thomas programme Development plan for refurbishing Seville Heritage Park in St Ann produced Water Sports Policy completed	Bath Heritage Town Project Appraisal Wayfinding station established in Yallahs TPDCo to refurbish Seville Heritage	Bath Heritage Town established Refurbish Wailers house in Trench Town Wayfinding station established in Bath	Eco-tourism training facility established as part of Hayfield CTE & Cunha Heritage Trail Wayfinding stations established in

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
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	operational community tourism enterprises	Building out a portfolio of attractions and activities will require new investments. The quantity and quality of investments is a function of the attractiveness of the incentives and the simplicity of the investment processes and procedures, especially in the feasibility and pre-investment phase of the investment cycle. The quality of the feasibility and pre-investment process affects the investor's financial control, risk exposure, and level of confidence. A high quality feasibility and pre-investment process will make Destination Jamaica internationally competitive, enhance its responsiveness to market requirements, and improve transparency and accountability.	<p>IC/digital technologies to enhance visitor experience TPDCo to create the infrastructure and institutions to support the build-out of natural & cultural heritage tourism</p> <p>Ministry to develop a Tourism Investments & Incentives Framework and Strategy to guide the flow of investments in support of balanced regional development, economic inclusion, environmental management, and local retention of foreign earnings</p> <p>Ministry to work with partners to streamline and simplify the feasibility and pre-investment process</p>	Incentives Framework & Strategy	TEF to refurbish Rocky Point Beach in St Thomas	<p>Park in St Ann</p> <p>Devon House establishes Gastronomy Centre</p> <p>TEF to refurbish Harmony Beach in Montego Bay</p>	TEF to refurbish Murdock Beach	<p>Morant Bay & Port Morant</p> <p>TEF to refurbish Watson Taylor Park in Lucea</p>

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
			TEF to expand the range of activities and amenities through the upgrading of public bathing beaches					
Increased level of participation by tourists in activities connected to natural and cultural heritage	<p>To establish a balanced portfolio of tourism attractions and activities by 2030 that utilize Jamaica's natural and cultural heritage</p> <p>To increase the number of licensed and operational community tourism enterprises</p>	Natural and cultural heritage experiences will become the core of the product offering and experience under the Blue Ocean Strategy. The majority of visitors will be encouraged to participate in at least one such experience during their visit	<p>JTB to carry out Demand Study for Gen-C</p> <p>JTB to promote cultural and heritage tourism</p> <p>JTB to employ IC/digital technologies in improved marketing</p> <p>JTB to seek new markets in Asia & Africa</p>	<p>% of tourists that participate in at least one paid/commercialized natural or cultural heritage experience</p> <p>% of overseas visitors that originate in non-traditional source markets</p>	<p>Tourism Demand Study</p> <p>Develop and launch Visit Jamaica application</p> <p>Develop new markets in Asia & Africa</p>	<p>Heritage tourism publicity campaign</p> <p>Develop new markets in Asia & Africa</p>	<p>Heritage tourism publicity campaign</p> <p>Develop new markets in Asia & Africa</p>	<p>Heritage tourism publicity campaign</p> <p>Develop new markets in Asia & Africa</p>
Improved readiness of the tourism workforce for employment	<p>To establish through the JCTI a permanent comprehensive suite of online tourism courses that lead to certification</p> <p>To develop a</p>	There is a great need to improve the quality of human capital within the tourism sector. The quality of a tourism destination's products and services is determined to a large extent by the quality of its human capital. Human capital consists of the economic value of	JCTI to create an inventory of the knowledge, education, vocational qualifications, professional certifications, work-related experiences, and even the	<p>% of the tourism workforce that is trained and certified within industry recognized areas.</p> <p>% of supervisory and management positions in tourism enterprises that is</p>	<p>Online Tourism Academy developed & implemented</p> <p>Human Capital Strategy & Framework</p>	<p>Development of an online Tourism Jobsite</p> <p>Support the delivery of housing units in resort areas</p>	Support the delivery of housing units in resort areas	

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
	Human Capital Strategy & Framework	<p>employees' knowledge, habits, competences, motivation, enthusiasm and other personality attributes. Increasing the competitiveness of a tourism destination requires an effective framework and strategy for human capital management.</p> <p>In addition to training there is a need for this training to be accessed anywhere in Jamaica. The online training must lead to improved/market-ready skills and industry recognized certification. This online training should be offered regionally at a cost to generate revenue for the JCTI. There is also a great need for training programmes to include foreign language and cultural awareness skills and the ability for tourism workers to increasingly utilize technologies in their work.</p> <p>Human capital development must also be complemented by</p>	<p>competencies of your workforce.</p> <p>JCTI to determine the human capital needs of the tourism sector</p> <p>JCTI to create a publicly accessible register of tourism workers giving their training, certification, experience, and employment history.</p> <p>TEF to identify the housing needs and gaps of tourism workers within Resort Destinations</p>	<p>held by locals</p> <p>% of tourism workers who do not live in a formal housing solution</p>	<p>developed & implemented</p> <p>Support the delivery of housing units in resort areas – Grange Hill</p>			

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
		programmes to address social protection, working conditions, and terms and conditions of service.						
Increased rate of innovation in the tourism sector	<p>To establish, in partnership with UTech/UWI/JBDC/JAMPRO, a tourism incubator</p> <p>To establish a framework of grants and loans to support the development and commercialization of ideas generated from the incubator</p>	<p>Innovation & entrepreneurship will be critical to the pivot towards natural & cultural heritage experiences, and the serving of niche tourism markets. While many Jamaicans possess nascent entrepreneurial talent many lack critical business skills and competences that are necessary for developing, commercializing, delivering, and scaling-up authentic and innovative tourism experiences to visitors. The take-up of technology by entrepreneurs is also too low. A tourism incubator would train and develop a pool of innovators and entrepreneurs and facilitate access to grants and loans to help them bring their ideas to market.</p>	<p>TEF will establish a tourism incubator in Montego Bay. Supported by the requisite institutional and academic framework</p> <p>TEF will identify partners for the incubator who will provide grants and loans to the most promising ideas.</p>	<p># of new tourism products and experiences commercialized by graduates</p> <p>Tourism Incubator established</p> <p>Incubator grant/loan programme established</p>	<p>JCTI will develop a framework & strategy to guide and govern the operation of the tourism incubator</p> <p>JCTI to establish tourism incubator with appropriate training programme</p> <p>JCTI to identify partners for financing innovative projects</p>	JCTI to train & certify 20 participants	JCTI to train & certify 50 participants	JCTI to train & certify 100 participants
Increased share of tourism value chain produced and	To strengthen/upgrade the tourism value chain	The extent of the contribution of tourism to Jamaica's social and economic development is	TEF to strengthen and expand commercial networking	% share of value in the value chain captured by local tourism enterprises	Artisan Village in Falmouth opened	Artisan Village in Negril opened	Artisan Village in Ocho Rios opened	Artisan Village in Montego Bay opened

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
delivered by Jamaican businesses	To diversify the accommodation sector to offer different styles, price points and locations	directly linked to the structure of the tourism value chain, the local share of that value chain, and the elements of that value chain that are produced by Jamaican businesses. Economic development will also be impacted by how well other value chains – such as for tourism supplying sectors and tourism support services – integrate with the tourism value chain and reduce dependence on imports of tourism inputs or serve as the basis for exports.	opportunities through the Linkages Programme JAMVAC to work with appropriate partners to build out the systems, services, & facilities required for cruise ships to homeport in Jamaica	% of foreign exchange earned by the sector that is retained by the local economy	Framework & Strategy for Homeporting developed	Framework & Strategy for Homeporting implemented		
	To implement project that increase the contribution to GDP from non-accommodation tourism sub-sectors		TEF to work with appropriate partners to develop the institutional and commercial systems to expand the production and sale of local art and craft	% share of GDP which comes from the tourism supplying and tourism supporting services sectors	National Tourism Competitiveness & Export Framework & Strategy developed	National Tourism Competitiveness & Export Framework & Strategy implemented		
	To establish Jamaica as a regional hub for the tourism supplying and tourism support services sectors	Tourism policy should encourage & facilitate growth in non-accommodation sub-sectors such as entertainment, dining, sports, tours, transportation, art & craft, attractions and activities. There should also be strategies to encourage & facilitate local tourism enterprises to move up the value chain to capture productive activities of greater value.		# of berths that are homeported in Jamaica				
	To create an environment that increases the level and quality of tourism investments		The Ministry will develop and implement a National Tourism Competitiveness & Export Framework & Strategy to create the infrastructure, regulations and institutions to expand and					

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
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		Finally, tourism policy should facilitate the strengthening of and diversification of tourism related value chains such as those in the tourism supplying and tourism support sectors. The supplying sectors include agriculture and agro-processing, construction, manufacturing, and finance and insurance; and the support sectors include security and safety, risk management, marketing and promotion, quality management, information and intelligence, technical and vocational education and training, R&D and innovation, and information and communications technologies. An expansion and upgrading of these value chains will lead to increased tourism competitiveness and exports	strengthen the tourism and tourism related value chains and make Jamaica an export hub for the tourism supplying and tourism support sectors. These strengthened value chains will acquire, retain, add, create and distribute value to maximise local economic impact and reduce leakages. The National Tourism Competitiveness & Export Framework & Strategy will provide a blueprint for the development and competitiveness of tourism as a broad-based export sector					
Reduced level of harassment of tourists	To create a programme in each Resort Destination for the re-	Harassment is one of the greatest risks to the reputation of the destination and the safety and security of visitors.	TPDCo to partner with academics, social workers, and local community development	% of tourists who have been the subject of an incident of harassment	Comprehensive Anti-harassment Strategy &	Implement Anti-harassment Strategy &	Implement Anti-harassment Strategy &	Implement Anti-harassment Strategy &

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
	socialization and skills upgrading of informal vendors, touts, and beggars and the formalization of their activities	Harassment can have an out-sized negative impact on the perception of the level of personal safety in a destination. Some visitors, especially outside of resorts, are subject to harassment and high-pressured selling by informal vendors, transport operators, touts, and beggars. Harassment is notoriously difficult to address and what constitutes harassment is quite subjective. The level of harassment of visitors must be reduced; however, because of its relation to the informal economy, it cannot be addressed in a manner that compromised Tourism Inclusiveness	<p>organizations to create an Anti-Harassment Framework and Strategy</p> <p>TPDCo to partner with business development agencies to support (or start) employment initiatives that move marginalized people towards sustainable and formal income generation.</p> <p>TPDCo to partner with community development agencies to support initiatives to foster social inclusion & empowerment of marginalized individuals and groups</p> <p>TPDCo to utilize legacy, social media, and social influencers for advocacy against tourist harassment</p>	Formal Anti-harassment Strategy & Framework developed	Framework developed	Framework in Negril	Framework in Ocho Rios	Framework in Montego Bay

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
Increased satisfaction in the Jamaican tourism experience	To implement the Destination Assurance Framework & Strategy	The level in visitor satisfaction in Destination Jamaica is related to perceptions about levels of safety, security, hygiene, access, mobility, and customer service. Jamaica needs to improve on the delivery of these crucial areas of destination assurance. Efficiency, effectiveness, and high quality service needs to be embedded in all aspect of the visitor's experience.	To restructure the Tourism Product Development Company (TPDCo) to implement and monitor the DAFS.	# of DACs fully operational	JTB to complete establishment of Jamaica Cares Programme	TPDCo restructured	Environmental Management System developed & implemented	
				Restructuring of DACs completed		DACs restructured		
	To create the institutional capacity to administer the DAFS and to manage Resort Destinations		TPDCo to establish a functioning network of Destination Assurance Councils to oversee the effective and efficient management of Resort Destinations	# of DACs operational	Destination Assurance Framework & Strategy completed	Quality Assurance Framework developed & Implemented	Disaster Risk Management Framework developed & implemented	
				Restructuring of TPDCo completed				
	To meet the demand from visitors for authentic Jamaican heritage and cultural experiences			% of tourism enterprises that are licensed	TPDCo to undergo Organizational Review	Implementation of Service Level Agreements with other MDAs	Safety & Security Management Framework developed & implemented	
					DACs to undergo Organizational Review			
	To meet the demand from visitors for safe, secure, and seamless experience		TPDCo to create an inter-agency framework for cooperation in planning and implementation of the Inspections & Licensing Regime and for streamlining and simplifying compliance processes		DAFS Communication Strategy developed	DAFS Communication Strategy implemented		
	To meet the demand from visitors for a variety of accommodation styles at different price							

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
	<p>points</p> <p>To expand and upgrade the Jamaica Cares Programme</p> <p>To expand/upgrade the network of tourism infrastructure and amenities across Jamaica</p>							
Increased number of Jamaicans who perceive that tourism is making a positive contribution to social and economic development	To implement a national communication programme of tourism awareness	Tourism plays an important role in the social and economic life of Jamaica but this is not always appreciated by the majority of Jamaicans. To ensure the smooth implementation of tourism policy and the investment of scarce public resources in tourism investments requires broad-based public support which can only occur through sustained public education and the shaping of values and attitudes towards tourism. Studies of perceptions should become systematic and done at regular intervals.	This programme is built around four key components: a national public awareness programme, a high schools' tourism training programme, community tourism empowerment programme, MSMTE business development programme. This programme will employ a Public Will Campaign and communications, educational, and interactive activities to change minds.	% of Jamaicans who perceive that tourism is making a positive contribution to social & economic development	<p>National Tourism Communication Strategy & Framework developed & implemented</p> <p>Study of tourism values & attitudes</p>			Study of tourism values & attitudes

Outcomes	Objectives	Description	Strategies	Indicator	Medium Term Framework – Projects/Initiatives/Outputs			
					2021/22	2022/23	2023/24	2024/25
Increased use of evidence in decision making, policy, and strategy	To implement a framework for timely collection, analysis, reporting and sharing of data	The availability of up-to-date and accurate information can greatly improve the quality and timeliness of decision-making. This requires the systems and institutional arrangements for data collection, analysis, reporting, and sharing of information with all relevant stakeholders. A robust and effective data management framework must also include stakeholder and risk management. Such a framework requires a cultural shift towards evidence-based decision-making in policy and strategy	Develop a programme to guide the development of the framework for data capture, analysis, reporting, and sharing. Conduct research into areas of interest to tourism stakeholders and decision-makers. Create and foster a culture of evidence-based decision-making within the Ministry of Tourism	# of tourism reports completed % of key tourism stakeholders who read the tourism reports % of Ministry decisions that is supported by recommendations in a tourism report	TSAP completed	Tourism Social & Economic Impact Assessment initiated	Tourism Environmental Assessment initiated	Tourism Landscape Assessment completed
					Tourism Landscape Assessment completed		Strategic Management Scan of the Tourism Sector completed	Labour Market Study completed
					Labour Market Study completed	Strategic Management Scan of the Tourism Sector completed		Strategic Management Scan of the Tourism Sector completed
					Negril Destination Management Plan completed	Strategic Risk Assessment of the Tourism Sector completed	Strategic Risk Assessment of the Tourism Sector completed	Strategic Risk Assessment of the Tourism Sector completed
					One new destination management plan initiated			
					Tourism Value Chain Study completed			
					Strategic Management Scan of the Tourism Sector completed			
					Strategic Risk Assessment of the Tourism Sector completed			