NATIONAL DESTINATION ASSURANCE FRAMEWORK & STRATEGY

Ministry of Tourism



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LIST OF ACRONYMS

ACS	Association of Caribbean States
AMANDA	Application Management and Data Automation
BCMS	Business Continuity Management System
BEST Cash	Business Employee Support and Transfer of Cash
BREA	Business Research and Economic Advisors
BSJ	Bureau of Standards Jamaica
CARE	COVID-19 Allocation of Resources for Employees
CARPHA	Caribbean Public Health Agency
CB	Certification Body
CBT	Community-Based Tourism
CCFPN	Climate Change Focal Point Network
CSR	Corporate Social Responsibility
CTO	Caribbean Tourism Organization
DAC	Destination Assurance Council
DAFS	Destination Assurance Framework and Strategy
DMO	Destination Management/Marketing Organization
DRM	Disaster Risk Management
e-Gov	E-Gov Jamaica Limited
EHS	Environmental, Health, and Safety
EIA	Environmental Impact Assessment
EMS	Environmental Management Systems
EXIM	Export-Import Bank of Jamaica
FCCA	Florida-Caribbean Cruise Association
GCT	General Consumption Tax
GDP	Gross Domestic Product
GHG	Greenhouse Gas
GST	Goods and Services Tax
GSTC	Global Sustainable Tourism Council
GSTC-D	GSTC Criteria for Destinations
GSTC-I	GSTC Industry Criteria
HEART/-NTA	Human Employment and Resource Training/ National Training Agency
IDB	Inter-American Development Bank
IFC	International Finance Corporation
IMF	International Monetary Fund
ISO	International Organization for Standardization
ISPS	International Ship & Port Security
JAMPRO	Jamaica Promotions Corporation
JBDC	Jamaica Business Development Company
JCF	Jamaica Constabulary Force
JCTI	Jamaica Centre of Tourism Innovation
JFB	Jamaica Fire Brigade
JHTA	Jamaica Hotel and Tourist Association
JNHT	Jamaica National Heritage Trust
JTB	Jamaica Tourist Board
KPI	Key Performance Indicator
LEED	Leadership in Energy and Environmental Design
M&E	Monitoring & Evaluation
MDAs	Ministries, Departments and Agencies of Government
MNS	Ministry of National Security
MOHW	Ministry of Health and Wellness
MOT	Ministry of Tourism
MSME	Micro, Small and Medium Enterprises
MSS	Management System Standards
NATFATIP	National Taskforce against Trafficking in Persons
NCBJ	National Certification Body of Jamaica
NCRA	National Compliance and Regulatory Authority
NCVET	National Council on Technical & Vocational Training
NDC	National Determined Contributions
NDP	National Development Plan
NEPA	National Environment and Planning Agency
NVQ-J	National Vocational Qualification of Jamaica
ODPEM	Office of Disaster Preparedness & Emergency Management
OECD	Organisation for Economic Co-operation and Development
OHS	Occupational Health and Safety
OHSMS	Occupational Health and Safety Management System
PAJ	Port Authority of Jamaica
PESTELE	Political, Economic, Social, Technological, Environmental, Legal and Ethical
PFSP	Port Facility Security Plan
PSRA	Private Security Regulation Authority
QA	Quality Assurance
QC	Quality Control
RDMOs	Regional Destination Management Organizations
SDGs	Sustainable Development Goals
SMTE	Small and Medium-Sized Tourism Enterprises
STATIN	Statistical Institute of Jamaica
STZC	Sustainable Tourism Zone of the Greater Caribbean
SWOT	Strengths, Weaknesses, Opportunities and Threats
TBT	Technical Barriers to Trade
TEF	Tourism Enhancement Fund
TEMC	Tourism Emergency Management Committee
TEOC	Tourism Emergency Operations Centre
THiS	Tourism and Health Information System
THP	Regional Tourism & Health Program
TPDCo	Tourism Product Development Company Ltd
TTCI	Travel & Tourism Competitiveness Index
UCJ	University Council of Jamaica
UDC	Urban Development Corporation
UNFCCC	United Nations Framework Convention on Climate Change
UNWTO	United Nations World Tourism Organization
WEF	World Economic Forum
WTTC	World Travel & Tourism Council

PREFACE

Like many other destinations around the world, Jamaica has been significantly affected by the COVID-19 pandemic, which is arguably the greatest global health, social and economic emergency of our time. It has been one of the greatest threats to the growth of the travel and tourism sector – causing the industry to come to a halt and a new tourism to emerge, as countries began to slowly re-open.

Jamaica was very pro-active in our approach to this pandemic. We coined the term "Generation-C" or "GEN-C" to refer to the new generation of travellers and developed a Destination Assurance framework, which focused on attending to the specific needs of these visitors. We recognised that this generation transcends demographics and reflects the shared psychographic outlook of those living through the pandemic.

We understand that this new generation of travellers requires health security, safety and destination assurance that gives confidence, so that when they leave where they are and visit Jamaica, they will feel that they will have a safe and hassle free experience.

Destination Assurance prioritizes health and safety, while positioning Jamaica as the premiere holiday choice for sun, sea and everything in between. When the industry came to a halt, we used the period to strategize and I gave a charge to the Jamaica Tourist Board to shape and provide tourism strategies that will deliver on the Destination Assurance promise of a safe, secure and seamless visit.

This led to the development of an official Destination Assurance Strategy and Framework, which represents a national strategic response to increased international demand for quality tourism experiences. It serves as a guiding mechanism to inform the development, adoption and implementation of policies and strategies, which will increase visitor confidence in the quality of service and amenities available in Jamaica, improve visitors' impressions of Jamaica's tourism sector, and aid in delivering a safe, secure, seamless and satisfying experience during their stay in Jamaica.

Destination management consists of the coordinated administration of all the elements that make up a tourist destination. It takes a strategic approach to connect these oftentimes separate elements for the better management of the destination. Joined up management can help to avoid overlapping functions and duplication of effort with regards to promotion, visitor services, training, business support and identify any management gaps that are not being addressed.

Key to this process was the Tourism Product Development Company, which has served as the central facilitator, encouraging cooperation and collaboration among Government entities, the private sector and the non-governmental organizations.

Jamaica's reputation as a world-class tourist destination with numerous quality offerings enables us to compete effectively in the marketplace. Satisfied tourists are essential for the longevity and sustainability of a destination. To remain competitive, Jamaica must deliver exceptional experiences and services and provide high value to visitors across all sub-sectors of the industry.

Ultimately by prioritizing the assurance of quality, Jamaica can deliver better tourism products and services, have the enhanced ability to adapt to the evolving needs and desires of its visitors, and increase overall visitor satisfaction, all of which improves its competitiveness and attractiveness as a destination.

Finally, I would like to commend the members of our hard-working team in the Ministry of Tourism and its public bodies, who have worked diligently to develop this strategy document, while ensuring that our tourism partners are informed about the strategy and that it is enforced. Rest assured, together we will overcome the challenges posed by COVID-19 and fulfil our mandate to redefine tourism and create a more viable, diverse and inclusive sector that benefits all Jamaicans.

Hon. Edmund Bartlett, CD, MP
Minister of Tourism



EXECUTIVE SUMMARY

Tourism is a major economic sector in Jamaica. The World Travel & Tourism Council (WTTC) reports that tourism accounted for 31% of Jamaica's direct, indirect and induced gross domestic product (GDP) in 2019, as well as 33% of total employment and almost 57% of total exports[1]. Tourism's direct contributions to GDP and the labour force were 9.8% and 12.8% respectively according to the Statistical Institute of Jamaica (STATIN) 2019.[2] Tourism is a significant driver of economic growth and prosperity for Jamaica and leads all other sectors in terms of its contribution to GDP, job creation and production of foreign revenues. The country ranks 16th globally in terms of economic dependence on the tourism sector.[3]

Quality and sustainability are key factors of Jamaica's competitiveness as a tourism destination. They represent Jamaica's brand promise to visitors. To remain competitive, Jamaica must deliver exceptional experiences and provide a high value to visitors.[4] It must also minimise destination risks from emergencies, disasters and climate change while maintaining the integrity and long-term health of local destinations. To achieve this, Jamaica will need to establish an acceptable degree of quality and sustainability among all providers and local destinations in the value chain through common criteria and the convergence of mandatory requirements and self-regulation.

In June 2020, the Government of Jamaica, through the Ministry of Tourism (MOT), initiated the development of a national tourism Destination Assurance Framework and Strategy (DAFS). The DAFS will serve as a long-term blueprint to guide the MOT and its partners to strengthen, further develop and implement policies and strategies that will ensure continuous improvement in the delivery and management of quality throughout the tourism value chain.

For the purpose of the DAFS, *destination assurance* is defined as Jamaica's brand promise to visitors that assures an authentic, safe and seamless experience which is respectful towards the community and the environment. The ultimate goal of destination assurance is to increase visitor satisfaction. Jamaica recognises that visitor satisfaction is a critical factor in the long-term success of the tourism sector and benefits the industry, local communities and visitors[5]. A high level of satisfaction motivates travellers to visit again, tell their family and friends about the destination, and provide free promotion that may increase visitation.

The DAFS was developed through an extensive participatory planning process that engaged nearly 300 stakeholders from the public, private and third (civic) sectors and spanned eight months from June 2020 to January 2021.

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[1] *World Travel & Tourism Council. (2020, March) Jamaica 2020 Annual Research: Key Highlights. https://wttc.org/Research/Economic-Impact.*
[2] *Statistical Institute of Jamaica. https://statinja.gov.jm/ Tourism Satellite Accounts - National Income and Production Tables, 2019*
[3] *Mooney, H. (2020, Quarter 1). Jamaica: Caribbean Economies in the time of Coronavirus. Inter-American Development Bank. https://flagships.iadb.org/en/caribbean-region-quarterly-bulletin-2020-q1/jamaica.*
[4] *Varghese, B. (2016). Application of Standardized Quality Policy & Quality Assurance of Tourism Products. Regional Standards Conclave (Bangalore). https://www.researchgate.net/publication/313655981_Application_of_Standardized_Quality_Policy_Quality_Assurance_of_Tourism_Products.*
[5] *Foster, D. (1999). Measuring customer satisfaction in the tourism industry. Paper presented at The Third International and Sixth National Research Conference on Quality Management, Melbourne, February 8–10, 1999.*

A. Current Situation

A comprehensive review of the situation identified main strengths and weaknesses associated with the current national destination assurance system. Strengths and weaknesses were identified from a side-by-side analysis of Jamaica's current destination assurance system, and the global benchmark was derived from a review of global national quality assurance programmes and global and regional standards. An analysis of key political, economic, sociological, technological, legal and environmental factors influencing destination assurance in Jamaica was used to identify opportunities and threats. A summary of the main strengths, weaknesses, opportunities and threats (SWOT) is outlined in the table below.

Destination Assurance—Strengths, Weaknesses, Opportunities and Threats

STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
1. Prioritization of tourism including a fairly strong legislative framework	1. No focus on continuous improvement	1. Shift to an experience-based economy	1. Economic downturn and slow recovery
2. Compelling incentives offered to licensed tourism enterprises	2. Lack of destination stewardship guidelines for DACs	2. Tourism enterprises are forced to differentiate on service	2. Increasing crime and youth unemployment
3. Local destination quality assurance management mechanism exists	3. Complex licensing system requiring time and costs, contributing to low compliance levels across SMTEs	3. Product development and diversification	3. Increased competition and lack of regulation of the sharing economy
4. Inclusion of communities and SMTEs in tourism	4. Lack of automated system	4. International and regional funding for climate change	4. Vulnerability to hazards/ disasters such as natural disasters, vector-borne diseases, pandemics and climate change
5. Robust funding mechanisms for product development and SMTEs	5. Visitor satisfaction areas of concerns: variety of shops, variety of things to do, ease of finding way around, tourism information, beaches, attitude of people, water sports activities	5. Destination Assurance is a driver of tourism sustainability	5. Deteriorating environment
	6. Visitor safety and security		
	7. Gaps in tourism enterprise standards: community engagement and support; involvement of community; environmental sustainability; climate risk management; disaster risk management; digital distribution marketing; business development; monitoring and enforcement		

The SWOT identified eight priority issues to address. These issues were validated through stakeholder consultations.

1. Complex licensing system that is expensive in terms of time and costs
2. Fragmented coordination and lack of an automated system that allows MDAs to share information
3. Tourism enterprise-level visitor satisfaction areas of concern, including visitor safety and security
4. Gaps in tourism enterprise standards
5. No focus on continuous improvement in tourism enterprises and local destinations
6. Lack of resilience and sustainability planning at the tourism enterprise and destination levels
7. Lack of destination stewardship guidelines for Destination Assurance Councils
8. Destination-level visitor satisfaction areas of concern, including visitor safety and security

These issues were used to help guide the vision, goals and strategies for Jamaica's improved National Destination Assurance Programme.

B. Vision and Strategy

Vision Statement: Destination Jamaica meets and exceeds visitor expectations seamlessly throughout the total chain of experiences that a visitor has in Jamaica—from arrival to departure.

The Ministry of Tourism envisions that Jamaica's National Destination Assurance Programme will foster continuous improvement among tourism enterprises, tourism workers and local destinations. Jamaica's new National Destination Assurance Programme will inspire the advancement of stakeholder-vetted destination assurance principles and internationally recognised operating best practices, both of which are essential to creating safe and attractive local destinations and to providing innovative, diversified and authentic tourism products and services for visitors and residents. The adoption of best practices among tourism enterprises, tourism workers and local destinations will ensure that the integrity of Jamaica's natural and cultural assets are maintained and the well-being of residents guaranteed. The strategic framework for the National Destination Assurance Programme is outlined below.

Overview of Goals and Measure of Successful Implementation

GOALS	OBJECTIVES	PRIORITY ACTIONS
1. STREAMLINE THE TOURISM LICENSING SYSTEM	1.1 Establish an integrated inspection process and cadre of inspectors.	1.1.1 Form centralized and integrated cadre of inspectors. 1.1.2 Revise licensing process to accommodate the integrated inspectors.
	1.2 Synchronize duration of tourism licences and certificates/permits which require inspections.	1.2.1 Evaluate and harmonize the time horizon of licences and permits.
	1.3 Establish an automated system that will improve efficiencies.	1.3.1 Put in place an automated system for enterprises to upload operational compliance documents. 1.3.2 Automate document gathering process. 1.3.3 Automate field inspection process and reports.
	1.4 Encourage widespread compliance and consistent enforcement	1.4.1 Promote tourism licensing improvements and encourage compliance. 1.4.2 Ensure that the licensing programme has effective enforcement of compliance and quality requirements. 14.3 Ensure the licensing programme addresses systemic issues associated with enforcement of compliance.

GOAL 1 INDICATORS

1a. Percentage of enterprises that are licensed (overall, by sector)

1b. Percentage of enterprises that are lin compliance (overall, by sector)

1c. Percentage of enterprises with access to the automated platform

1d. Number of inspectors dedicated to compliance licensing and COVID certification

1e. Number of required inspections per year required for JTB licence (by sector)

1f. Estimated time period of application process to obtain/renew JTB licence (by sector)

GOALS	OBJECTIVES	PRIORITY ACTIONS
2. CREATE A DESTINATION ASSURANCE CERTIFICATION PROGRAMME THAT BUILDS ON THE EXISTING COMPLIANCE FRAMEWORK FOR TOURISM ENTERPRISES	2.1 Enhance all existing regulatory requirements for tourism enterprises.	2.1.1: Update regulatory and administrative compliance requirements for tourism licensing.
	2.2 Establish voluntary standards for developing a quality management system.	2.2.1: Establish a quality management standard for tourism enterprises.
	2.3 Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern.	2.3.1: Establish internationally recognised standards that focus on sustainable tourism best practices.
	2.4 Establish voluntary standards for product development.	2.4.1: Establish product development standards that address authentic and high-quality experiences and products.
	2.5 Develop Destination Assurance Certification Programme.	2.5.1: Establish a Destination Assurance Certification Programme Scheme.
	2.6 Build capacity of enterprises to adopt quality, sustainability and product development standards.	2.6.1: Provide online training that supports adoption of new standards. 2.6.2: Raise awareness of locals and visitors about health, safety and security best practices.

GOAL 2 INDICATORS

2a. Percentage of enterprises which have accessed the Quality Management System Standard & Training (overall, by sector)

2b. Percentage of enterprises which have accessed the Destination Assurance Standards & Training (overall, by sector)

2c. Percentage of enterprises which have accessed the Product Development Standards & Training (overall, by sector)

2d. Percentage of enterprises which have applied for certification (overall, by sector)

2e. Number of trainings, public awareness campaigns, and other engagement activities per year related to Destination Assurance

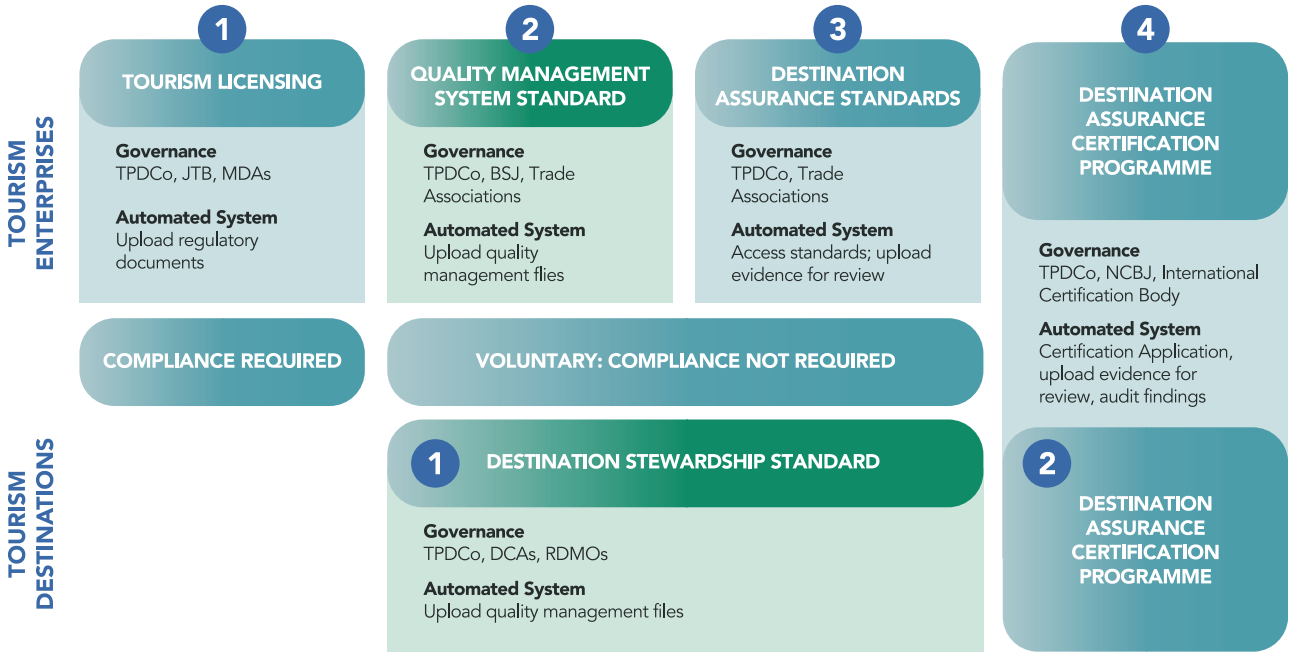
GOALS	OBJECTIVES	PRIORITY ACTIONS
3. ESTABLISH PERMANENT, REGIONAL MANAGEMENT OF DESTINATION ASSURANCE	3.1 Establish a destination stewardship standard.	3.1.1: Develop national destination stewardship standard.
	3.2 Establish regional destination management organisations.	3.2.1: Institutional strengthening of Destination Assurance Councils. 3.2.2: Establish regional destination management organisations.
	3.3 Expand the National Destination Assurance Programme to include certification of local destinations.	3.3.1: Develop Destination Stewardship Toolkit and Technical Assistance Programme. 3.3.2: Establish a destination certification system. 3.3.3: Promote widespread adoption of a destination standard.
GOAL 3 INDICATORS 3a. Number of RDMOs implementing the Destination Stewardship Standard 3b. Number of RDMOs certified 3c. Number of Destination Assurance initiatives put in place by RDMOs 3d. RDMOs are established, have dedicated budgets and core personnel		
4. ENHANCE SHARED MANAGEMENT AND MONITORING OF DESTINATION ASSURANCE	4.1 Establish automated coordination systems and build capacity of MDAs for shared management and monitoring.	4.1.1: Introduce an automated system for managing and monitoring destination assurance.
	4.2 Introduce a guidance document for the management of the National Destination Assurance Programme.	4.2.1: Define programmatic governance and operational management for Destination Assurance. 4.2.2: Establish mechanism for improved coordination and collaboration among co-managers and partners.
	4.3 Establish a monitoring system that will facilitate continuous improvement.	4.3.1: Develop a national level monitoring system for collecting visitor satisfaction from enterprises. 4.3.2: Develop a national level monitoring system for climate change.
GOAL 4 INDICATORS 4a. Number of TPDCo staff dedicated to managing Destination Assurance 4b. Visitor satisfaction indicators improving 4c. Repeat visitors indicators increasing 4d. Tourism revenue indicators increasing 4e. Tourism workforce indicators improving 4f. Quality of life indicators improving		

Jamaica's National Destination Assurance Programme will:

- Streamline the existing licensing process for tourism enterprises by establishing an integrated (unified) compliance conformity assessment process for on-site inspections, and by automating the system.
- Introduce a standard quality management system and standards for sustainability, to foster a culture of continuous improvement among tourism enterprises.
- Establish a certification programme that will verify the status of tourism enterprises' performance in meeting quality and sustainability standards. The certification programme can be managed internally (i.e., by a local entity) or externally (through partnerships with existing international certification programmes).
- Introduce a destination stewardship standard.
- Expand the certification programme for tourism enterprises to include verification of local destinations' performance against the standard.

An illustration of the overarching framework for Jamaica's National Destination Assurance Programme is provided below.

Jamaica's National Destination Assurance Programme Framework



C. Implementation

The DAFS presents a total of 27 priority actions that are required to fully develop the National Destination Assurance Programme. Partnerships will be critical for implementation. The Tourism Product Development Company Ltd. (TPDCo), as the lead agency for destination assurance, will need to strengthen and deepen partnerships with ministries, departments and agencies (MDAs) for tourism licensing, and will need to work with the private sector through their trade associations on the development and roll out of the quality management system and sustainability standards. The Destination Assurance Councils (DACs) will remain important partners at the local destination level.

National Destination Assurance Programme Implementation Plan

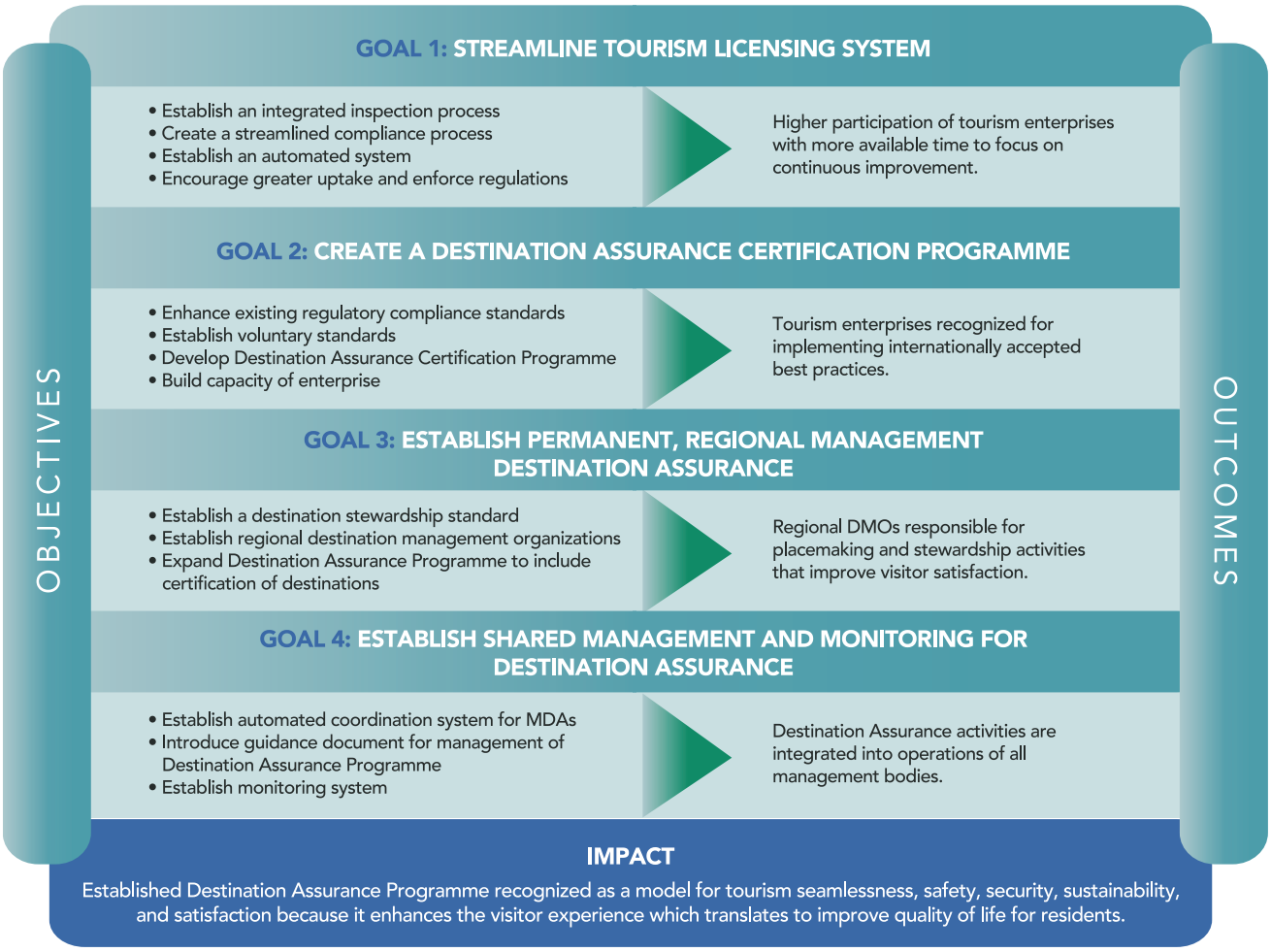
OBJECTIVES	PRIORITY ACTIONS	TIME HORIZON	LEAD	SUPPORTING PARTNERS	BUDGET (JAD / USD)
1.1 Establish an integrated inspection process and cadre of inspectors.	1.1.1 Form centralized and integrated cadre of inspectors.	Short Term (Years 1-3)	TPDCo	JCF, JFB, MOHW NEPA	$40 million / $266,666
	1.1.2 Revise licensing process to accommodate the integrated inspectors.	Short Term (Years 1-3)	TPDCo	MOHW, JCF, JFB, NEPA	$2.5 million / $17,000
1.2 Synchronize duration of tourism licences and certificates/permits which require inspections.	1.2.1 Evaluate and harmonize the time horizon of licences and permits.	Short to Medium Term (Years 1-6)	TPDCo	MOHW, JCF, JFB, NEPA	$1.5 million / $10,000
1.3 Establish an automated system that will improve efficiencies.	1.3.1 Put in place an automated system for enterprises to upload operational compliance documents.	Short Term (Years 1-3)	TPDCo	JTB, MOHW, JCF. JFB, NEPA, E-Gov	$153 million / $1.02 million
	1.3.2 Automate document gathering process.	Short Term (Years 1-3)	TPDCo	JTB, MOHW, JCF. JFB, NEPA, E-Gov	Cost presented in 1.3.1
	1.3.3 Automate field inspection process and reports.		TPDCo	JTB, MOHW, JCF. JFB, NEPA, E-Gov	$900,000 / $6,000
1.4 Encourage widespread compliance and consistent enforcement	1.4.1 Promote tourism licensing improvements and encourage compliance.	Short to Medium Term (Years 1-6)	TPDCo	SMTE's, JHTA and other trade associations, MDAs	$13 million / $86,666
	1.4.2 Ensure that the licensing programme has effective enforcement of compliance and quality requirements.	Short Term (Years 1-3)	TPDCo	SMTE's, JHTA, MDA partners	Cost presented in 1.3.1
	1.4.3 Ensure that the licensing programme addresses systemic issues associated with enforcement of compliance.	Short to Medium Term (Years 1-6)	TPDCo	MDA partners	No additional cost
2.1 Enhance all existing regulatory requirements for tourism enterprises	2.1.1 Update regulatory and administrative requirements for tourism licensing.	Short to Medium Term (Years 1-6)	MOT, JTB, TPDCo	MDA partners, NEPA, ODPEM	$3 million / $20,000
2.2 Establish voluntary standards for developing a quality management system	2.2.1 Establish a quality management standard for tourism enterprises.	Short Term (Year 1)	JTB, TPDCo	BSJ, JHTA and other trade associations, SMTs	$3 million / $20,000
2.3 Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern	2.3.1 Establish internationally recognised standards that focus on sustainable tourism best practices.	Short Term (Years 1-3)	MOT, JTB, TPDCo	MOT, JTB, BSJ, NEPA, Municipal Corporation, MDA Partners	$8.8 million / $58,666

OBJECTIVES	PRIORITY ACTIONS	TIME HORIZON	LEAD	SUPPORTING PARTNERS	BUDGET (JAD / USD)
2.4 Establish voluntary standards for product development	2.4.1 Establish product development standards that address authentic and high-quality experiences and products.	Short Term (Years 1-3)	TPDCo	JCTI, JNHT, UDC Craft Association	$7.3 million / $48,666
2.5 Develop a Destination Assurance Certification Programme	2.5.1 Establish a Destination Assurance Certification Programme Scheme.	Short Term (Years 1-3)	TPDCo	NCBJ, JTB, JCTI, JHTA and other trade associations	$9 million / $60,000
2.6 Build capacity of enterprises to adopt quality, sustainability and product development standards	2.6.1 Provide online training that supports adoption of new standards.	Short Term (Years 1-3)	TPDCo	JCTI, ODPEM, MOHW	$4.5 million / $30,000
	2.6.2 Raise awareness of locals and visitors about health, safety and security best practices.	Short Term (Years 1-3)	TPDCo	JCTI, ODPEM, JTB	$16 million / $106,666
3.1 Establish a destination stewardship standard.	3.1.1 Develop national destination stewardship standard.	Short Term (Years 1-3)	TPDCo	BSJ, GSTC, DACs, NEPA	$9 million / $60,000
3.2 Establish regional destination management organisations.	3.2.1 Institutional strengthening of Destination Assurance Councils.	Short Term (Years 1-3)	TPDCo	DACs	$79 million / $106,666
	3.2.2 Establish regional destination management organisations.	Medium to Long Term (Years 4-10)	TPDCo/ JTB	JTB, Attorney General, DACs, destination stakeholders	$142.8 million / $112,000
3.3 Expand the National Destination Assurance Programme to include certification of local destinations.	3.3.1 Develop Destination Stewardship Toolkit and Technical Assistance Programme.	Short to Medium Term (Years 1-6)	TPDCo	DACs, local consultants	$49.5 million / $330,000
	3.3.2 Establish a destination certification system.	Medium Term (Years 4 to 6)	TPDCo	NCBJ, international certification bodies	$7.5 million / $50,000
	3.3.3 Promote widespread adoption of destination standard.	Short to Long Term: (Years 1-10)	TPDCo	Ministry of Finance, Ministry of Industry and Commerce, TEF, Financial institutions such EXIM Bank, Jamaica National among others	$13 million / $86,666
4.1 Establish automated coordination systems and build capacity of MDAs for shared management and monitoring.	4.1.1 Introduce an automated system for managing and monitoring destination assurance.	Short Term: (Years 1-3)	TPDCo	See Goal 1	See Goal 1
4.2 Introduce a guidance document for the management of the National Destination Assurance Programme.	4.2.1 Define programmatic governance and operational management for Destination Assurance.	Short Term: (Years 1-3)	TPDCo	MOT, BJS	$6 million / $40,000
	4.2.2 Establish mechanism for improved coordination and collaboration among co-managers and partners.	Short Term: (Years 1-3)	TPDCo	MDA partners	$1.5 million / $10,000
4.3 Establish a monitoring system that will facilitate continuous improvement	4.3.1 Develop a national level monitoring system for collecting visitor satisfaction from enterprises.	Short to Medium Term (Years 1-6)	JTB	JTB, JHTA and other trade associations	$6 million / $40,000
	4.3.2 Develop a national level monitoring system for climate change.	Short to Medium Term (Years 1-6)	TPDCo	JTB, JHTA, NEPA, MEGJC	$6 million / $40,000

D. Expected Outcomes

The expected outcomes of the overall DAFS are outlined in the diagram below. The Ministry of Tourism envisions that the National Destination Assurance Programme will ensure seamless delivery of quality and sustainability throughout all components of the tourism value chain, ultimately improving visitor satisfaction and community well-being.

Overview of Expected Outcomes of Jamaica's National Destination Assurance Programme for Tourism Enterprises and Destinations





INTRODUCTION

A. Background

Jamaica is highly dependent on the success of the tourism sector to support the national economy. Tourism accounts for nearly one-third (31%) of all economic activity (World Travel & Tourism Council, 2019). It is therefore a national imperative to ensure continuous improvement and long-term competitiveness of the tourism sector. According to the Statistical Institute of Jamaica, in 2019, the tourism sector outgrew the local economy fourfold and outgrew other industries by 5.7%. Additionally, the tourism sector outgrew the local economy for nine of the last ten years. The tourism sector directly contributes 9.8% to GDP and directly contributes 12.6% to the labour force (STATIN, 2019). The Government of Jamaica (GOJ) acknowledges the strategic importance of ensuring that all governance, management and operational frameworks for tourism are effective and coordinated in order to support visitor confidence and satisfaction.

The Ministry of Tourism—through its agencies, TPDCo, and the Tourism Enhancement Fund (TEF)—is actively engaged in efforts to continuously improve visitor satisfaction levels by enhancing the tourism product. These efforts, along with those of other key MDAs, are integral to ensuring that Destination Jamaica lives up to and exceeds its brand promise. The Ministry of Tourism and its agencies recognize, however, there are still opportunities to improve the visitor experience by inspiring higher levels of compliance, helping tourism enterprises adopt quality and sustainability standards and encouraging local destinations to improve destination stewardship.

The GOJ, through the MOT, seeks to develop a tourism DAFS as a guiding mechanism for these efforts. A strong DAFS will support the strengthening, development and implementation of policies and strategies which will increase visitor confidence in the quality of tourism services and amenities available in Jamaica, improve visitor impressions of Jamaica's tourism sector, and ensure delivery of a seamless and satisfying visitor experience. The DAFS will provide a clear policy framework to guide the MOT and its public and private sector partners.

The COVID-19 pandemic has crystallized the importance of the DAFS as a means to assure visitors of a safe, authentic and secure experience. Stopover and cruise visitor arrivals fell by 67% and 71% respectively in 2020 when compared to 2019 (STATIN). The primary drivers for this drop were the global pandemic and its associated travel restrictions, and visitor apprehension about health and safety during travel and arrival in their chosen destinations. In the context of a pandemic and the ongoing importance of growing Jamaica's tourism sector, a rebound in the industry and visitor confidence can only be enhanced by an effective DAFS policy implementation framework.

The MOT identified several initial themes to help frame the DAFS. These themes include visitor safety and security, standards and quality control, disaster risk management, climate change adaptation, environmental management and protection, compliance and institutional capacity.

B. Rationale

The process of assuring visitors that Destination Jamaica will meet and exceed their expectations involves many stakeholders: MDAs that govern and manage the tourism sector, small and medium tourism enterprises (SMTEs) that provide services to the sector, trade associations that represent SMTEs, workers employed directly by the sector, managers at the local destination level and visitors themselves. An overarching strategic framework is needed to articulate a common vision with clearly defined goals and strategies. This framework will guide the development, implementation and monitoring of a new and improved National Destination Assurance Programme that includes all key stakeholders and drives change throughout the tourism value chain. Since destination assurance in Jamaica currently focuses only on compliance, the DAFS will need to serve as a blueprint for expansion beyond compliance to encourage the adoption of international quality and sustainability standards. The new quality and sustainability standards will foster continuous improvement among tourism enterprises and local destinations. Continuous improvement is imperative for maintaining competitiveness.

The DAFS will ensure that Jamaica's tourism sector meets international best practices and guidance by:

- Strengthening the adoption of relevant ISO standards for the industry;
- Complying with key United Nations frameworks that support standards and guidelines for the key areas of focus within destination assurance; and
- Supporting the achievement of the universal 2030 Agenda for Sustainable Development and the Sustainable Development Goals by embracing the UN World Tourism Organisation's (UNWTO) 'Tourism 4 SDGs' Agenda.

Furthermore, important destination assurance principles such as authenticity, inclusion and sustainability, which have been prioritized by tourism stakeholders, must form an integral part of the DAFS.

The management of destination assurance is a shared responsibility that requires strong intragovernmental and public-private coordination and collaboration. The DAFS can help to strengthen shared management and monitoring of destination assurance by articulating priority issues and strategies for addressing them. The DAFS implementation plan will identify priority actions and the resources needed for implementation, so GOJ can more easily incorporate these into the strategic plans, budgets and monitoring frameworks of the MOT and its Agencies as well as the MDAs that support tourism. The DAFS will inform the approaches and legislative reforms required by the Jamaica Tourist Board (JTB) and will identify the new partnerships needed between TPDCo and the private sector and third sector to effectively implement the new National Destination Assurance Programme. This guidance will enable TPDCo and other stakeholders to incorporate new partnerships and other related priority actions into their annual operational plans.

Communicating the goals, objectives, strategies and initiatives is critical to the successful launch of the new National Destination Assurance Programme. A clear communications strategy that increases the awareness of stakeholders, engenders buy-in at all levels of the country and informs visitors will be instrumental in ensuring that the DAFS is fully adopted.

The DAFS is expected to inspire the seamless delivery of quality and sustainability throughout the entire tourism value chain, resulting in improved visitor satisfaction and repeat visitation that will ensure the long-term sustainability and competitiveness of Destination Jamaica.

C. Definitions

The term *destination assurance* was first coined in 2017 by the Minister of Tourism, Hon. Edmund Bartlett, who recognised the need to strengthen the programmes that facilitate visitor satisfaction in a more deliberate manner. This term is unique to Jamaica; the widely used industry term is *quality assurance*.

The UNWTO defines a *quality assurance system* (in Jamaica's case, a *destination assurance system*) as "a company's or destination's activities, procedures, processes and resources, with the view to installing and managing quality". In other words, quality assurance involves the integration of quality across all aspects of a tourism enterprise or destination in order to satisfy visitors' and other stakeholders' requirements. It also involves verification (and certification) that tourism enterprises and destinations are meeting and exceeding these requirements.

In more general terms, a tourism *destination* is defined as the place visited that is central to the decision to take the trip. The term *assurance* is defined as "a positive declaration intended to give confidence; a promise" (Oxford Dictionary, 2013).

In Jamaica's context, the working definition of Destination Assurance is Jamaica's brand promise to visitors that they will enjoy an authentic, safe, and seamless experience which is respectful towards the community and environment. Destination assurance is operationalized through excellence in quality delivery; excellence in assurance of the health, safety and security of visitors; and excellence in the resilience and sustainability of destinations. 'Visitor Confidence and Satisfaction: Our Commitment' captures the essence of the working definition and can serve as a slogan for destination assurance.

The *National Destination Assurance Programme* refers to Jamaica's national tourism quality and sustainability certification programme, which supports tourism enterprises and local destinations in consistently delivering tourism products, experiences and services that ensure visitor satisfaction throughout the entire tourism value chain, enhance the local economy and well-being of local residents, and minimise the negative social and environmental impacts of tourism. Since *destination assurance* is a term unique to Jamaica, there is an opportunity to strategically position it as part of the establishment of the national quality and sustainability certification programme.

The guiding principles of Jamaica's National Destination Assurance Programme are outlined below.

GUIDING TENETS	DESTINATION ASSURANCE
Visitor Satisfaction	… is Jamaica's brand promise to visitors that ensures safety and security, sanitation and health, accessibility, adequate infrastructure, public amenities and services, and authenticity.
Seamlessness	… ensures visitor satisfaction through the total chain of experiences that a visitor has in Jamaica—from arrival to departure.
Continuous Improvement	… builds the capacity of tourism enterprises and local destinations to meet and exceed visitor expectations through delivery of quality tourism products, services and experiences. … supports tourism enterprises and destinations to operate and grow sustainably and enhance their resiliency through a blend of mandatory requirements, voluntary guidelines and consistent enforcement.

GUIDING TENETS	DESTINATION ASSURANCE
Social Responsability	... builds the capacity of tourism workers to grow and move into higher quality jobs in the sector.
Inclusion, innovation and authenticity	… enables inclusion of SMTEs and product innovation through adaptability of standards and systems. … supports development and delivery of authentic products and services. ...supports economic benefits to SMTEs and communities
Respect towards the community and environment	… promotes the sustainable management of tourism enterprises and local destinations through actions that balance their needs with benefits to the local community and protection of cultural and natural heritage.
Shared management	… facilitates the shared management of compliance and continuous improvement through an integrated system of management, monitoring and evaluation at the national and local levels that fosters greater communication, cooperation and collaboration among entities.

The guiding tenets are operationalized through the implementation of best practices that are categorized into the following Destination Assurance Pillars:

Quality

Health, Safety and Security

Resilience

Sustainability

Below are example best practices for each pillar for enterprises and destination managers.

DESTINATION ASSURANCE PILARS	EXAMPLE ENTERPRISE BEST PRACTICES	EXAMPLE DESTINATION BEST PRACTICES
Quality	• Leadership Commitment • Communication Protocols • Operations Manuals • Workforce Training • Performance Monitoring	• Regional destination management organizations or destination stewardship standard • Stakeholder Engagement • Strategic Plan • Planning Regulations • Performance Monitoring
Health, Safety and Security	• Compliance • Workforce Welfare • Visitor Welfare • Access to Medical Services • Secure Facilities • Transparent Reporting of Crime	• Health, Safety, and Security Assessments Public Health Regulations and Guidelines • Tourism Security Plan • MDA Coordination
Resilience	• Risk & Resilience Assessment • Emergency Response • Disaster Recovery • Climate Adaptation • Business Continuity	• Land Use Regulations • Tourism Regulations • Social Safety Nets
Sustainability	• Natural & Cultural Heritage Preservation • Environmental Resource Conservation • Economic Benefits to Community • Engagement, Education, Experiences • Equity, Inclusion, Accessibility	• Asset Protection • Visitor Use Management • Heritage Regulations • Environmental Regulations • Placemaking

D. Objective

A main goal of the overall strategy of the MOT and its agencies is to assure a high level of quality and authenticity in tourism products and services. Therefore, the overarching objective of the DAFS is to improve tourism compliance and establish a quality and sustainability certification programme for tourism enterprises and local destinations. The new National Destination Assurance Programme that will be directed and managed by TPDCo will improve the quality of Jamaica's total tourism product over time, ultimately increasing visitor satisfaction and repeat visitation.

E. DAFS Document

This DAFS presents a long-term strategic blueprint for integrating quality and sustainability in all components of Jamaica's tourism value chain. It provides direction and guidance to the MOT and TPDCo for developing and implementing a comprehensive national certification programme guaranteeing the quality and sustainability of tourism enterprises and local destinations, which will ensure that Destination Jamaica maintains its competitiveness.

The DAFS includes a comprehensive analysis of Jamaica's existing tourism licensing system as well as a review of global quality assurance systems. It identifies key issues, opportunities and challenges. A shared vision for destination assurance and realistic goals and objectives are outlined, along with practical strategies and priority actions for development and implementation of a new National Destination Assurance Programme.

The DAFS was developed through a participatory planning process that engaged nearly 300 stakeholders and spanned eight months, from June 2020 to January 2021. The main elements of the DAFS incorporate public and private stakeholder insights and feedback. Stakeholders were organised into three main categories:

- Co-managers of the tourism licensing system (MOT, TPDCo, JTB and other MDAs);
- Users of the existing tourism licensing system (tourism enterprises from all the subsectors regulated and the trade associations that represent these subsectors); and
- Local destination-level decision-makers and managers (TPDCo Destination Managers and DACs).

The planning process involved the MOT and its portfolio agencies, the DAFS Steering Committee—which is composed of MDAs involved in the shared management of the current tourism licensing system—and private sector stakeholders through numerous focus groups and visioning and planning workshops. One-on-one interviews with key public and private sector leaders provided feedback about and insights into destination assurance issues, challenges, and opportunities. Additionally, two surveys were deployed to gather insights from tourism enterprises about their perspectives as users of the current programme, and Destination Assurance Councils (DACs) as important actors in destination management.

Adequate representation from all key stakeholder groups was ensured throughout the planning and consultation process. Stakeholder representation was organised by stakeholder type (public, private, and third sectors) and by stayover or cruise tourism, and tourism enterprises were sampled based on their geographic location to ensure representation of all Resort Areas, enterprise sizes, and subsectors—accommodations, attractions, shopping (including crafts), tour operators, transportation, water sports, and ports of entry. The table below provides details on the type and total number of stakeholders and organisations engaged in the process.

METHOD	LEVEL OF ENGAGEMENT	DESCRIPTION OF STAKEHOLDERS
Tourism Enterprise Survey	111 Respondents Distributed to 400-500 tourism enterprises across all Resort Areas	Sample of tourism enterprises based on TPDCo's database of licensed tourism operators cut across all key subsectors: accommodations, attractions, shopping including crafts, tour operators, transportation, water sports.
DAC Self-Assessment Survey	39 Respondents Distributed to 150 DAC members across all seven DACs	DAC Chairs, DA Managers, DAC members from public and private sectors.
One-on-One Interviews	13 MDAs and other co-implementers of the DA programme	MDAs: Bureau of Standards Jamaica (BSJ), Jamaica Tourist Board (JTB), Kingston and St. Andrew Municipal Corporation (KSAMC), Linkages Council, Ministry of Economic Growth and Job Creation (MEGJC), Montego Bay DAC, Ministry of National Security (MNS), Ministry of Health (MOH), National Environmental Planning Agency (NEPA), Passport, Immigration, and Customs Agency (PICA), Port Authority of Jamaica (PAJ), Tourism Enhancement Fund (TEF), and Tourism Product Development Co. Ltd. (TPDCo)
	9 users of the DA programme, mainly industry associations and a few tourism enterprises	Industry associations, accommodation providers, tour operators, DMCs, transportation providers.
Focus Group Sessions	17 MDAs that co-implement national destination assurance programme	MDAs: TPDCo, TPDCo DA Managers, Ministry of Culture, Gender, Entertainment & Sport (MCGES), MEGJC, Ministry of Industry, Commerce, Agriculture & Fisheries (MICAF), Meteorological Service, Ministry of Finance (MOF), Ministry of Transport & Mining (MTW), Water Resources Authority (WRA), Jamaica Vacations Limited (JAMVAC), Jamaica Constabulary Force (JCF), Jamaica Social Investment Fund (JSIF), Planning Institute of Jamaica (PIOJ), National Compliance and Regulatory Authority (NCRA), and others.
	20 tourism enterprises and trade associations	Private Sector: industry associations, accommodations, attractions, tour operators, transportation, and other tourism enterprises.
	48 tourism workers	Tourism Workers: hotel staff from two all-inclusive properties and one tour operator.
Executive Meetings	9 DAFS Steering Committee members	MDAs involved in co-implementation of national destination assurance programme
	Honorable Minister of Tourism and the Tourism Executive team - 24 persons	Representatives from MOT, JTB, TPDCo, TEF, JAMVAC, MBCC, Milk River Bath, Devon House
	5 Linkages Council Network Chairs	Council Chairman, Network Chairs for Agriculture, Entertainment/ Sports, Gastronomy, and Shopping
Visioning & Planning Workshops	50 tourism stakeholders - implementers and users of the DA programme 9 DAFS Steering Committee members	Everyone that was invited or participated in a one-on-one interview or focus group session was invited to attend a visioning and planning workshop.

The DAFS document is organised into several chapters, as detailed below.

Chapter 1: Situation Analysis

Chapter 2: Vision

Chapter 3: Strategy

Chapter 4: Implementation Plan

Chapter 5: Legislative & Policy Framework

Chapter 6: Monitoring & Evaluation Framework

Chapter 7: Communication Plan



CHAPTER 1

SITUATION ANALYSIS

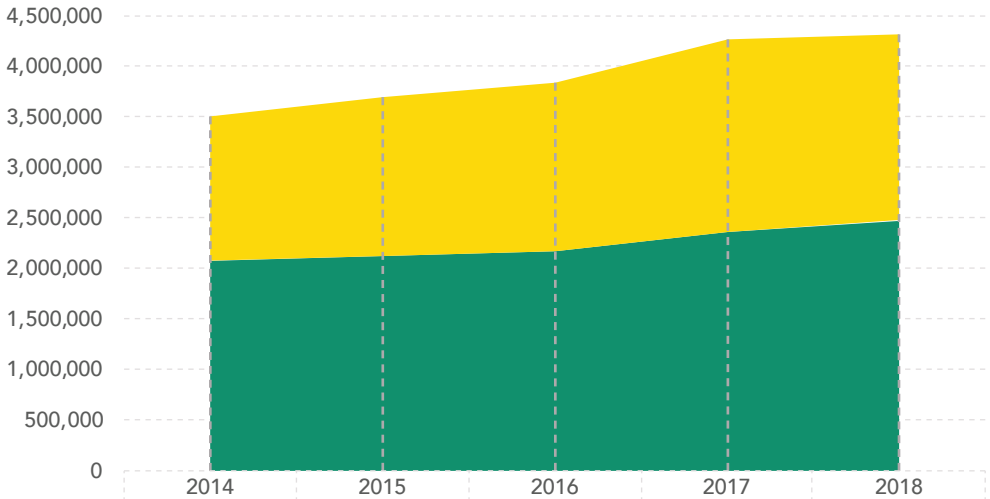
This chapter presents a comprehensive analysis of the current situation. It assesses the existing tourism licensing system, introduces tourism quality concepts, assesses trend lines in visitor satisfaction and repeat visitation, outlines main findings from a global review of quality assurance systems, examines the political, economic, social, technological, environmental and legal factors that influence tourism and destination assurance, and identifies strengths, weaknesses, opportunities and threats.

1. INTRODUCTION

Tourism is a major economic sector in Jamaica. The WTTC reports that tourism accounted for 31% of Jamaica's 2019 GDP, 33% of employment and almost 57% of total exports.[8] Tourism is a significant driver of economic growth and prosperity for Jamaica and leads all other sectors in terms of its contribution to GDP, creation of jobs, and production of foreign revenues. The country ranks 16th globally in terms of countries' economic dependence on the tourism sector.[9]

In 2018, Minister Edmund Bartlett called tourism "our most resilient sector expanding by 36% over the last 10 years compared with total economy growth of 6%, accounting for over 8.4% of GDP and employing over 106,000 directly or 1 in every 4 Jamaicans".[10] Over the 15-year period from 2004 to 2018, annual visitor arrivals increased by nearly 72%, and over the five-year period from 2014 to 2018, annual visitor arrivals increased by over 23%.[11] Figure 1 shows the growth of stopover and cruise passenger arrivals to Jamaica from 2014 to 2018 based on the most recent available data from the Jamaica Tourist Board (JTB).

Figure 1: Growth in Visitor Arrivals to Jamaica 2014–2018



	2014	2015	2016	2017	2018
Cruise Passengers*1	,424,047	1,569,342	1,656,151	1,923,274	1,845,873
Stopovers2	,080,181	2,123,042	2,181,684	2,352,915	2,472,727

Source: Jamaica Tourist Board
*Cruise Passengers includes armed forces on naval vessels

8World Travel & Tourism Council. (2020, March) Jamaica 2020 Annual Research: Key Highlights. https://wttc.org/Research/Economic-Impact.

9 Mooney, H. (2020, Quarter 1). Jamaica: Caribbean Economies in the time of Coronavirus. Inter-American Development Bank. https://flagships.iadb.org/en/caribbean-region-quarterly-bulletin-2020-q1/jamaica.

10 Ministry of Tourism. (2018, March 14). The Ministry of Tourism's Five- Year Strategic Vision for Tourism Development in Jamaica [Press release]. https://www.mot.gov.jm/speeches/ministry-tourism's-five-year-strategic-vision-tourism-development-jamaica.

11 Annual Travel Statistics 2018. (2019, December 3). Research and Market Intelligence Unit – Jamaica Tourist Board. https://www.jtbonline.org/report-and-statistics/annual-travel/.

By the end of 2019, Jamaica's tourism industry was on target to become the country's fastest growing economic sector, and was recording the fastest growing stopover arrivals and earnings out of all Caribbean destinations.[12] Growth was projected to continue and exceed 2016's five-year targets of 5 million visitors, US$5 billion in earnings, and 125,000 in total direct employment by 2021.[13] The COVID-19 pandemic will greatly impact these growth projections. The International Monetary Fund (IMF) estimated in May 2020 that Jamaica's economy will retract by 5.3% and tourist arrivals are expected to recover only gradually over the 2020–2021 fiscal year.[14] Tourism had initially been projected to earn US$4.25 billion for the 2020–2021 fiscal year, which was reduced to US$3.69 billion in early March 2020.[15]

The impacts of COVID-19 on Jamaica's economy are anticipated to be even more significant than early projections. As of November 2020, a minimum of 50,000 employees directly employed in the tourism industry have been laid off as a result of the pandemic.[16] Total layoff numbers are likely even higher considering the indirect impacts of the tourism sector. Jamaica's real GDP is expected to decrease by 9% in 2020.[17] Since Jamaica reopened its borders on June 15, 2020, the JTB recorded just over 211,000 visitors to the island from June to September 2020. This translated to tourism earnings of US$231.9 million for this period.[18] The JTB also noted that hotel occupancy rates are slowly increasing and anticipates a 40% increase in arrivals over the winter 2021 season compared to the preceding periods of downturn due the pandemic.

The quality of Jamaica as a tourism destination is a key component of its competitiveness. Satisfied tourists are essential for the longevity and sustainability of a destination. To remain competitive, Jamaica must deliver exceptional experiences and services and provide high value to visitors across all sectors of the industry.

By prioritizing quality and the assurance of quality, Jamaica can deliver better tourism products and services, have greater ability to adapt to the evolving needs and desires of its visitors, and increase overall visitor satisfaction, all of which enhances its competitiveness and attractiveness as a destination.

To better understand how satisfied tourists are with their experience in Jamaica, the JTB publishes annual Visitor Opinion Survey Reports by conducting randomized visitor exit surveys from the Norman Manley and Sangster International Airports throughout the year.

On average, 63% of exit survey respondents stated that they were very satisfied and 24% were satisfied with their experience in Jamaica between 2015 and 2019. The year-on-year levels of satisfaction have fluctuated considerably as can be seen in Figure 2.

12 Hines, H. (2019, December 30). Jamaica records best tourism numbers – Bartlett. Jamaica Observer. http://www.jamaicaobserver.com/news/jamaica-records-best-tourism-numbers-bartlett_183331.

13 Tourism sector on track to exceed growth targets. (2019, November 7). Jamaica Observer. http://www.jamaicaobserver.com/news/tourism-sector-on-track-to-exceed-growth-targets_179048.

14 International Monetary Fund. (2020, May 10). Jamaica: Request for Purchase Under the Rapid Financing Instrument – IMF Country Report No. 20/167. https://www.imf.org/~/media/Files/Publications/CR/2020/English/1JAMEA2020001.ashx.

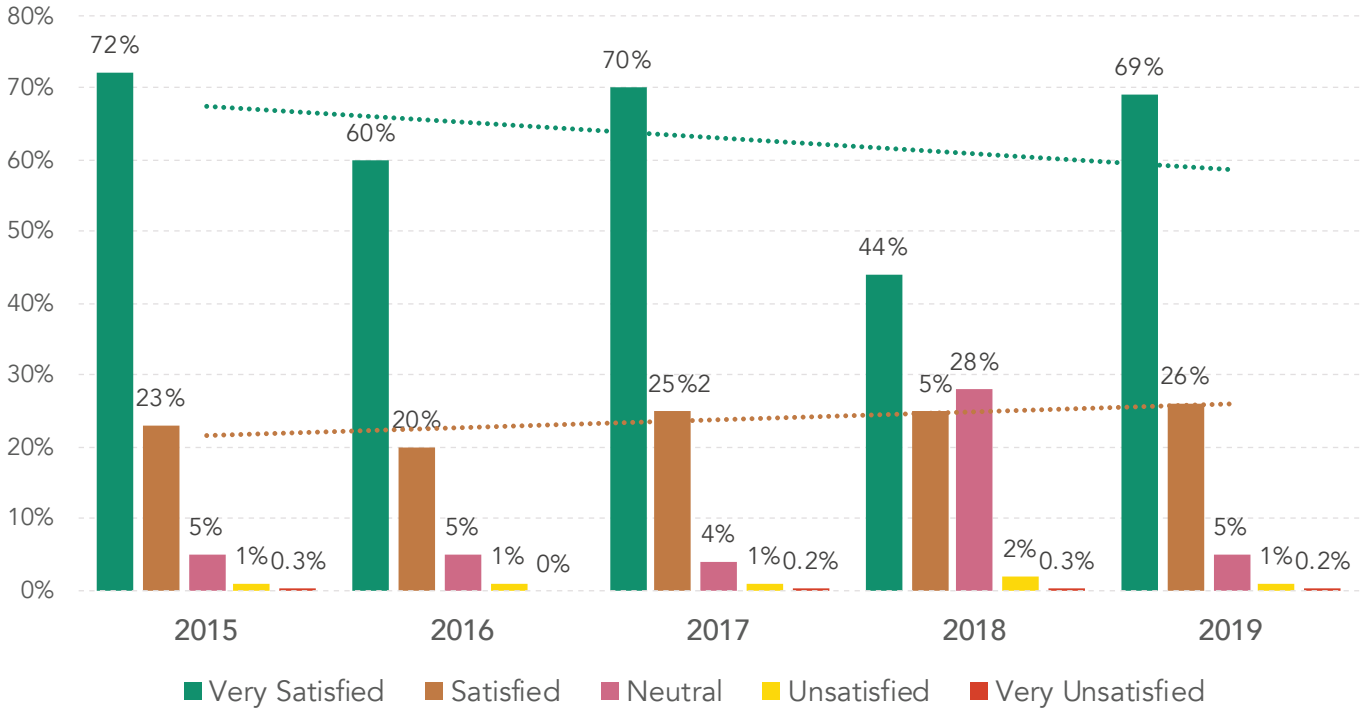
15 Campbell, E. (2020, March 4). Tourism Fallout – Sector Forecast to Shed J$76 Billion As Coronavirus Causes Plunge in Revenue Projections. The Gleaner. http://jamaica-gleaner.com/article/lead-stories/20200304/tourism-fallout-sector-forecast-shed-j76-billion-coronavirus-causes.

16 Cucagna, M. E. & Johnson, S. (2020, November 17). Return to paradise: A poverty perspective on Jamaica's COVID-19 recovery response. World Bank Blogs. https://blogs.worldbank.org/latinamerica/return-paradise-poverty-perspective-jamaicas-covid-19-recovery-response.

17 Ibid.

18 Bartlett says tourism must get back on track. (2020, November 9). Jamaica Observer. http://www.jamaicaobserver.com/latestnews/Bartlett_says_tourism_must_get_back_on_track.

Figure 2: Level of Satisfaction with Jamaica 2015–2019



Source: Jamaica Tourist Board

On average, 1.4% of respondents stated that they were either very unsatisfied or unsatisfied with their experience. Respondents noted a variety of reasons as to why they would not revisit Jamaica. Recurring reasons included that they:

- Had a better experience elsewhere
- Found the destination to be unclean
- Thought the overall trip was too expensive
- Experienced issues with immigration officers
- Dealt with harassment and other safety issues
- Found the infrastructure and roads to be of poor quality

These findings reflect different aspects of destination quality that impact the overall visitor experience.

While the majority of visitors to Jamaica are very satisfied with their overall experience, visitor experiences can differ greatly depending on the level of development, hospitality, and overall quality of the attraction, accommodation, experience, and destination itself, which can vary greatly. Since quality relates to a visitor's total experience in Jamaica, just one bad experience at the airport, a restaurant, a beach or a hotel can do irreparable damage to visitor perceptions and the reputation of the entire destination.

This chapter of the DAFS consists of a situational analysis of the existing quality assurance system, a gap analysis of Jamaica's tourism quality assurance strategies compared to global standards and programmes, and an assessment of the legislative and institutional framework for Destination Assurance in Jamaica.

The development of the DAFS is imperative given today's realities. The COVID-19 pandemic has brought additional pressure on the sector's goal of destination assurance. The need to reassure visitors that their experience in Jamaica will be safe in the midst of and after a pandemic requires new and augmented approaches for destination quality assurance.

2. TOURISM DESTINATION QUALITY

This section of the Situation Analysis provides an overview of the main concepts associated with tourism destination quality. It defines the concept of quality in tourism, discusses quality in tourism as a factor of competitiveness, explains Destination Assurance, outlines models of standardization of tourism quality and discusses visitor satisfaction as an outcome of destination quality.

A. The Concept of Quality in Tourism

Jamaica's tourism product consists of a mix of everything and every person that a visitor comes in contact with during their time in the country. It is more than just an accommodation or attraction. The tourism product is primarily the experience.

Quality relates to the total experience that a visitor has in Jamaica. The visitor considers the experience in the destination as a whole: the chain of experiences that span from arrival at the airport to transportation, accommodation, dining and entertainment, attractions and tours, as well as the providers that are a part of it.

Visitors value and demand quality, and as is illustrated in Figure 3 they determine **their level of satisfaction with the destination is based on the cumulative sum of their experience with each component of the value chain.**

Figure 3: Quality and the Tourism Value Chain



The World Tourism Organization (UNWTO) defines the quality of a tourism destination as "the result of a process which implies the satisfaction of all tourism product and services needs, requirements and expectations of the consumer at an acceptable price, in conformity with mutually accepted contractual conditions and the implicit underlying factors such as safety and security, hygiene, accessibility, communication, infrastructure and public amenities and services. It also involves aspects of ethics, transparency and respect toward the human, natural and cultural environment".[19]

[19] *World Tourism Organization. (2017). Practical Guidelines for Integrated Quality Management in Tourism Destinations – Concepts, Implementation and Tools for Destination Management Organizations. http://www.e-unwto.org/doi/epdf/10.18111/9789284417988.*

The UNWTO definition identifies several underlying factors associated to the quality of a destination:

- Safety and security
- Hygiene
- Accessibility
- Communication
- Infrastructure
- Public amenities and services
- Community well-being
- Respect of nature and culture

Based on UNWTO's definition, quality shouldn't be measured solely on the perspective of customer satisfaction. It should also be assessed in terms of the social, economic and environmental impacts of tourism. Sustainability is therefore an attribute of quality.

The main attractions of Jamaica are its natural and cultural heritage, living culture and people. Maintaining the long-term health of Jamaica's tourism industry is a shared responsibility. Providers should help to maintain the integrity of Jamaica's natural and cultural assets and ensure the well-being of its residents. Providers that demonstrate social responsibility, environmental stewardship and an attitude of respect toward the community and environment are sure to garner the social licence to operate, thrive and grow in the long term.

While tourism enterprises play a key role in ensuring safety and security, accessibility, and public health, the UNWTO definition underscores implicitly the role that the (subnational) destination plays in enabling and supporting quality, especially as it relates to policies, regulations and initiatives that ensure safety and security, hygiene, and accessibility, as well as infrastructure and public amenities and services.



B. Quality and Competitiveness

Quality is a key factor of Jamaica's competitiveness as a destination. It represents Jamaica's brand promise to visitors. To remain competitive, Jamaica must deliver exceptional experiences and provide a high value to visitors.[20] To achieve this, Jamaica will need to meet an acceptable degree of quality among all providers in the value chain by establishing common criteria and the convergence of mandatory requirements and self-regulation.

At the destination level, quality has a variety of benefits, most of which are most noticeable in the long term. This includes improvement of a destination's image and positioning, increase in capacity to compete against other destinations, greater negotiation opportunities with operators, improvements to overall management and planning, support for implementation of legislation, and streamlining of implementation and monitoring costs over time.[21]

For tourism enterprises in Jamaica, quality is equally important in a highly competitive global marketplace. Quality is not just meeting visitor expectations, but exceeding them. Providers throughout the tourism value chain must expend constant effort to limit deficiencies and failures. They must ensure that they get it right the first time. Achieving excellence in service delivery and offering good value for money to visitors does not occur automatically. It requires planning and management, and a culture of caring, innovation and excellence—all focused on continuous improvement over time. In Japan, successful businesses apply a philosophy known as Kaizen, which translates to "change for the better". The concept focuses on the gradual and methodical continuous improvement of all business functions and involves every employee from entry level staff to the CEO. This concept can be useful to adopt when seeking to improve the quality of products and services.

By focusing on quality, businesses will be able to design and deliver better products and services, have greater ability to adapt to evolving needs of customers, and increase customer satisfaction, all of which enhances competitiveness.[22] Additionally, ensuring quality will help tourism enterprises improve the workplace environment, increase efficiency, and strengthen their negotiating position within the value chain, since "quality, when certified, constitutes a complementary instrument for promotion and marketing".[23]

The World Economic Forum (WEF) Travel and Tourism Competitiveness Index (TTCI) published in 2019 ranked Jamaica's overall performance as 76th out of 140 countries with an average score of 3.7 (1 being the worst, and 7 the best; Spain ranked number 1 with a score of 5.1).[24] In 2019, Jamaica scored exceptionally well in the area of Prioritization of Travel and Tourism—second in the world—due to government prioritization, spending, and effectiveness in tourism marketing.

As seen in Table 1, Jamaica's overall TTCI competitiveness ranking and score has not shifted since 2015. Between the 2017 and 2019 assessments there were slight improvements in areas of Health and Hygiene, Prioritization of Tourism & Travel, Price Competitiveness, Ground and Port Infrastructure, and Tourism Services Infrastructure. Unfortunately, within that same time frame Jamaica's score decreased in the areas of Natural Resources and Environmental Sustainability. All other factors remained relatively stable over the two-year period.[25]

Table 1: World Economic Forum TTCI Assessment Overall Results—Jamaica 2015–2019

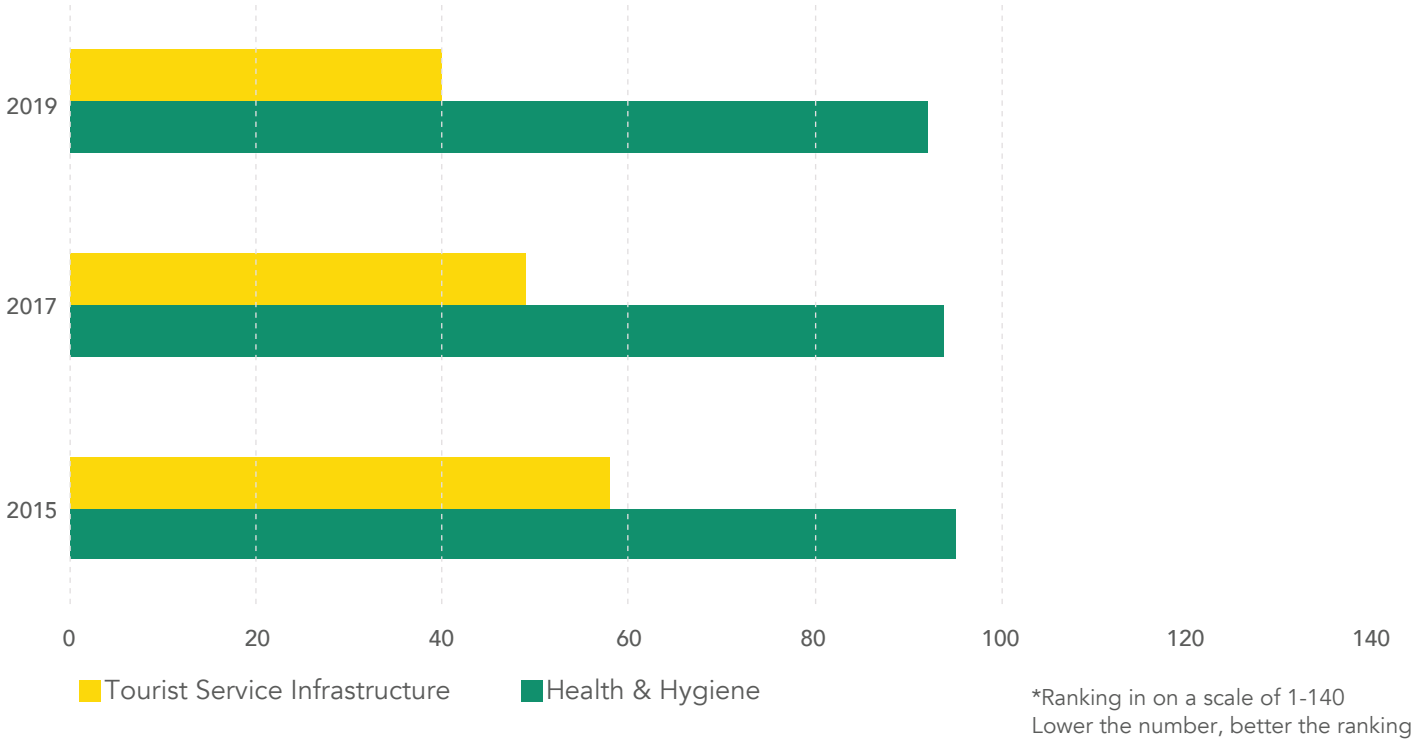
PAST PERFORMANCE			
Travel & Tourism Competitiveness Edition	2015	2017	2019
Rank	76/*141*	69/*136*	76/*140*
Score	3.6	3.7	3.7

Source: World Economic Forum, 2019

20 Varghese, B. (2016). Application of Standardized Quality Policy & Quality Assurance of Tourism Products. Regional Standards Conclave (Bangalore). https://www.researchgate.net/publication/313655981_Application_of_Standardized_Quality_Policy_Quality_Assurance_of_Tourism_Products.
21 World Tourism Organization. (2017). Practical Guidelines for Integrated Quality Management in Tourism Destinations: Concepts, Implementation and Tools for Destination Management Organizations. http://www.e-unwto.org/doi/epdf/10.18111/9789284417988.
22 UNWTO, Practical Guidelines.
23 UNWTO, Practical Guidelines.
24 Calderwood, L. U. and Soshkin, M. (2019). The Travel & Tourism Competitiveness Report 2019: Travel and Tourism at a Tipping Point. World Economic Forum. http://www3.weforum.org/docs/WEF_TTCR_2019.pdf.
25 World Economic Forum. (2019). Jamaica Travel & Tourism Competitiveness Index 2019 edition. http://reports.weforum.org/travel-and-tourism-competitiveness-report-2019/country-profiles/#economy=JAM

As seen in Figure 4, Jamaica has steadily improved in Health & Hygiene and Tourist Service Infrastructure from 2015 to 2019. In Health & Hygiene, the improvements are largely due to the increase in physician accessibility and access to sanitation and water sources. Jamaica also ranked in the top third of countries for Tourist Service Infrastructure (40) in 2019, thanks to its high scores for quality of tourism infrastructure (10), port infrastructure (33) and air transport infrastructure (35). In Tourist Service Infrastructure, the improvements are largely due to improvements in the quality of tourism infrastructure category. Jamaica's ranking in this category has improved from number 54 in 2015 to number 10 in 2019.

Figure 4: Jamaica Competitiveness Index Improvements 2015–2019: Health and Tourist Infrastructure



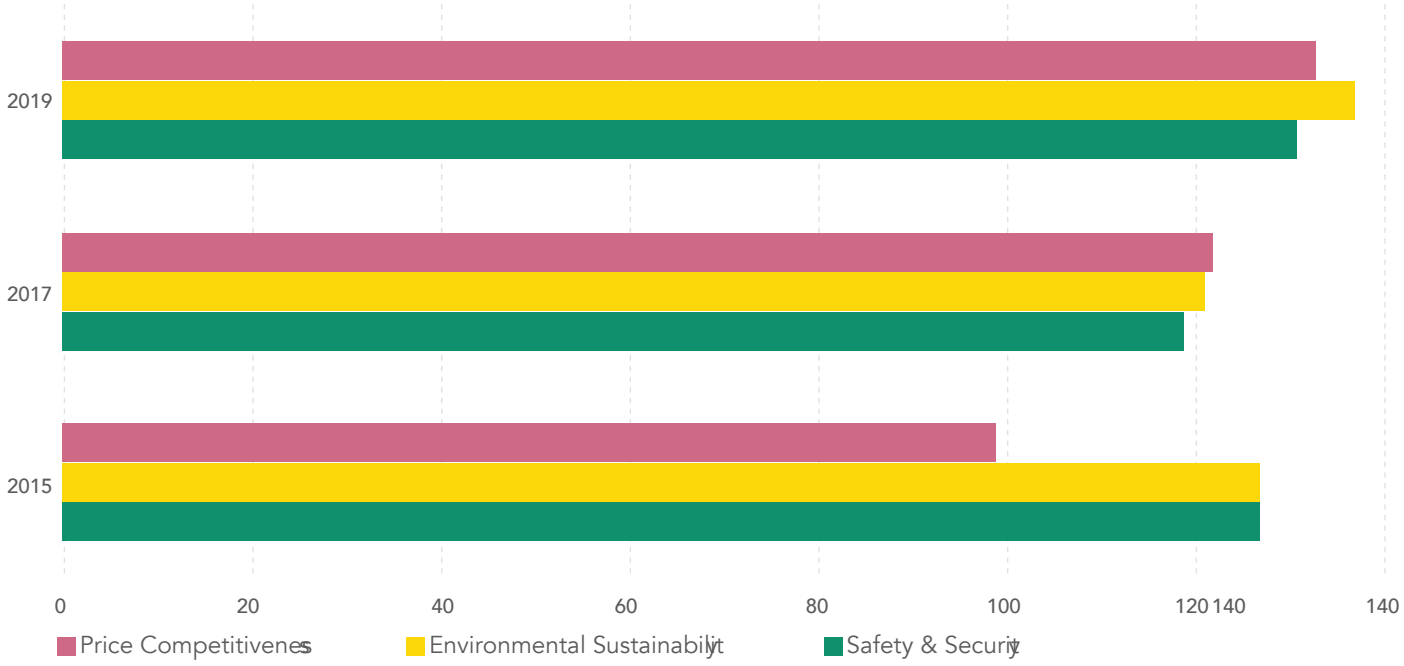
Source: World Economic Forum, 2019

Unfortunately, as seen in Figure 5, Jamaica ranked poorly and has continued to decline in the areas of Environmental Sustainability, Price Competitiveness, and Safety & Security, which are all important areas of destination quality. Safety & Security has shown a continuous negative shift since 2015. In 2019, the most recent year for which ratings are available, Safety & Security remained a problem due to low scores for homicide rate (137), business costs of crime and violence (135), and reliability of police services (103).

Since 2015, Jamaica's Environmental Sustainability has declined the most in global ranking, largely due to threatened species and baseline water stress. That said, within the Environmental Sustainability category, Jamaica has improved its rankings in Stringency of Environmental Regulations (from a 2015 rank of 91 to a 2019 rank of 78) Enforcement of Environmental Regulations (2015 rank 96, 2019 rank 78), and Sustainability of Tourism Industry Development (2015 rank 40, 2019 rank 35).

Jamaica's Price Competitiveness ranking has continued to decline from 99 in 2015 to 133 in 2019, due to taxes, airport charges, fuel price, and purchasing power parity. These index rankings flag important aspects of destination quality such as safety, security, price competitiveness and environmental sustainability that require a strategic response.

Figure 5: Jamaica Competitiveness Index Declines 2015–2019: Safety and Security, Environmental Sustainability, Price



*Ranking in on a scale of 1-140
Lower the number, better the ranking

Source: World Economic Forum, 2019



C. Tourism Quality Assurance

Maintaining an adequate, uniform and stable level of quality is central to managing the quality of a destination, which in turn impacts the overall visitor experience. Quality among all providers in the value chain in a destination is often achieved by conformance to criteria and standards and the convergence of mandatory requirements and self-regulation.

The UNWTO defines the term *quality management system or quality assurance system* as "a company's or destination's activities, procedures, processes and resources, with the view to installing and managing quality".[26]

Quality management systems ensure that a product or service is consistently delivered. It incorporates both quality assurance and quality control. Quality assurance aims to prevent issues from arising, and is focused on the continuous process of evaluating, monitoring and improving the quality of products and services. Quality control aims to detect whether a product or service is working properly, and therefore is focused on the end product and on filling quality requirements. In essence, a quality management system or quality assurance system consists of a set of policies, processes, and procedures that a tourism enterprise establishes to ensure quality, operational efficiency, environmental performance, and health and safety in the workplace.

Quality needs to be managed to reach desired objectives and outcomes, and a typical approach is adherence to standards. Standards can help to ensure specific outcomes in similar circumstances by implementing uniform criteria. Destinations often administer standards officially in order to create a reference point for tourism providers and guests (domestic and international) by standardizing processes, products and services on a voluntary or mandatory, internal or external basis, so as to validate and assure their quality and protect guests, public health and the environment. The extent to which the standard may be mandatory or voluntary is often contingent on how critical the consequences of poor performance can be to the protection of guests. For instance, having a food hygiene system is critical to good sanitation and may be a basic mandatory requirement, whereas standardizing the quality of the services offered at the restaurant is not.



26 World Tourism Organization. (2017). Practical Guidelines for Integrated Quality Management in Tourism Destinations – Concepts, Implementation and Tools for Destination Management Organizations. http://www.e-unwto.org/doi/epdf/10.18111/9789284417988.

D. Standardization of Tourism Quality

Destination quality assurance systems are often structured according to components of the tourism value chain, i.e. accommodation providers, tour operators, transportation providers, etc., and aim to:

- Identify possible differences between visitor expectations and quality provided by each of the processes and service that comprise the value chain
- Take a critical look at the causes of the deficiencies
- Implement an improvement plan

Table 2 outlines three main models of systematizing tourism quality. Currently, Jamaica uses standardization for a wide range of subsectors in the tourism value chain, including but not limited to tours, attractions, transportation and restaurants, as well as categorization for hotels. Both of these systems are mandatory and supervised by TDPCo, a portfolio agency of the Jamaica Ministry of Tourism. The comprehensive analysis of Jamaica's existing National Destination Assurance Programme follows in Section IV of this chapter.

Table 2: Differences Between Standardization, Certification and Categorization[27]

STANDARIZATION	CERTIFICATION	CATEGORIZATION
• Mandatory/self-regulated; • Defines operational or product specifications; • Generally a participatory process; • Market needs oriented; and • Public service/market oriented.	• Generally voluntary; • Supported by a standard; • A form of recognition that confirms whether a tourism enterprise, product, or process meets the standard; • Market oriented; • Externally, independently validated; • Commercial orientation; and • Associated with a brand.	• Mandatory; • Administrative requisite; • Supported by a standard; • Exclusively technical approach; • Organizational purpose; and • Supervised by a public entity.

Source: UNWTO, 2017

[27] *World Tourism Organization. (2017). Practical Guidelines for Integrated Quality Management in Tourism Destinations: Concepts, Implementation and Tools for Destination Management Organizations. http://www.e-unwto.org/doi/epdf/10.18111/9789284417988.*

E. Visitor Satisfaction

Visitor satisfaction is indicative of destination performance. Visitor satisfaction is a critical factor in the long-term success of a destination, and it brings benefits to the industry, local communities and visitors.[28]

The six main competitive advantages that tourism enterprises accrue from ensuring visitor satisfaction are illustrated in Figure 6.

Figure 6: Six Competitive Advantages through Customer Satisfaction[29]



Source: Sheth, 2001

Destination-level visitor satisfaction studies find that a high level of satisfaction motivates travellers to visit the destination again in the future, tell their family and friends about the destination, and provide free promotion of the destination that may help to increase visitation.30 It is therefore important that destinations understand the level of visitor satisfaction, and identify the drivers of satisfaction and causes of dissatisfaction in order to inform strategic decisions about tourism development, experience development and delivery and management of quality through the tourism supply chain.

[28] *WFoster, D. (1999). Measuring customer satisfaction in the tourism industry. Paper presented at The Third International and Sixth National Research Conference on Quality Management, Melbourne, February 8–10, 1999.*

[29] *Sheth, J. N. (2001). Competitive Advantages through Customer Satisfaction. BMA Review. 2(1), 13–25.*

[30] *Sheth (2001); Kozak, M., & Rimmington, M. (2000). Tourist satisfaction with Mallorca, Spain, as an off-season holiday destination. Journal of Travel Research, 38(3), 260–269; Yu, L., & Goulden, M. (2006). A comparative analysis of international tourists' satisfaction in Mongolia. Tourism Management, 27(6), 1331–1342.*

3. REVIEW OF GLOBAL QUALITY ASSURANCE SYSTEMS

This section of the Situation Analysis provides a comprehensive review of global quality assurance systems and standards in order to respond to the following questions:

- How are global tourism quality assurance systems structured?
- What are the criteria and best operating practices that tourism quality standards cover?
- Are there international standards for tourism enterprises and destinations?

A thorough review of global standards was conducted to gain an understanding of universal themes related to quality assurance/management systems, and to determine if and how those best practice procedures relate to the main components of Jamaica's Destination Assurance framework.

The research team identified and reviewed 45 published global standards applicable to Quality Assurance, Tourism Enterprises and Tourism Destinations. Further categorizing of standards created groupings which covered: Quality Management, Quality Control, Quality Assurance Standards; Health & Safety Standards; Security Standards; Risk Management Standards; Sustainability Standards; Tourism Standards; Compliance Auditing Standards; and Governance Standards.

Three main standard developers were identified: International Organization for Standardization (ISO), Global Sustainable Tourism Council (GSTC) and International Finance Corporation (IFC). It is important to underscore that ISO standards MSS provide the baseline standard and other standard developers follow the ISO model.

ISO. The ISO is recognized as the go-to global resource for management system standards (MSS). According to the ISO MSS website, "MSS are the result of consensus among international experts with expertise in global management, leadership strategies, and efficient and effective processes and practices". Through their MSS, ISO aims to "help organizations improve their performance by specifying repeatable steps that organizations consciously implement to achieve their goals and objectives, and to create an organizational culture that reflexively engages in a continuous cycle of self-evaluation, correction and improvement of operations and processes through heightened employee awareness and management leadership and commitment".[31]

Furthermore, one of the fundamental principles of the ISO's work is that the full suite of standards can work together. For example, a quality management system initiated using the ISO 9001 standard can integrate the ISO 14001 environmental management standard without disrupting those existing systems. To date, ISO has published more than 80 standards.

The strength of the ISO framework is evident in the adoption of their management systems framework. The Bureau of Standards Jamaica (BSJ) has adapted several ISO standards. In fact, the Jamaican Government implements the ISO 9001 Quality Management System Standards in the public sector and encourages the private sector to adopt them as well.

The GSTC was formed in 2007 as an organization responsible for fostering increased awareness of sustainable tourism and the adoption of universally accepted best practices. It is supported by the UNWTO, and with extensive global multi-sectoral stakeholder input the organization has developed two standards: the GSTC Industry Criteria (GSTC-I) and the GSTC Criteria for Destinations (GSTC-D). The GSTC also oversees a global accreditation programme for certification bodies who use the GSTC-I and GSTC-D to certify businesses and destinations. The criteria, certification procedures and accreditation requirements all follow ISO MSS for conformity audits, ecolabelling, and quality management systems.

[31] *International Standards Organization. (2020, January 23). Management system standards. https://www.iso.org/management-system-standards.html.*

The IFC Performance Standards and World Bank Environmental, Health, and Safety (EHS) Guidelines define IFC client responsibilities for the management of environmental and social resources. They act as an international benchmark for environmental, health, safety, and social risk assessment and management. These standards are applied during the construction phase of large-scale IFC-funded projects and are expected to remain in place throughout the life of the investment. While the IFC Performance Standards and World Bank EHS Guidelines define specific management procedures and management system processes, in most cases they refer to other ISO standards for content-specific best practices.

Global standards were reviewed primarily through in-depth examination of the content provided on the website of various standard setting bodies. The findings were distilled and organised into four areas:

- Purpose for the standard
- Users who typically uses the standard
- Expected Outcomes from adopting a standard
- Contents (primary themes and practices)

A table summarizing the detailed findings of the global review of standards is included in the DAFS Situation Analysis Report given to the Ministry of Tourism in March 2020.

This review of global standards will establish a benchmark which will help identify gaps and inform strategic recommendations for the scope, process and enhancements of the DAFS.



A. Structure of International Quality Assurance Systems

Table 3 presents the recurring themes and priority areas identified from the comprehensive review of global quality assurance systems. Based on the findings, an ideal quality assurance system should encompass a management system that focuses on three P's: Planning, Procedures and Performance.

Table 3: Main Structure of International Quality Assurance Systems

THEMES	PRIORITY AREA	OVERVIEW OF PRIORITY AREAS
1. PLANNING	Leadership and Management Oversight	Including senior management in the development and oversight of standards and management systems to determine strategic objectives; defining stakeholder outcomes; and assigning roles, responsibilities and authority to appropriate staff
	Scope	Providing specific parameters for what will be covered in the management system
	Compliance	Providing expectations of compliance to all international, national, and local regulations as well as organisational policies, standards and voluntary best practices
	Communication	Defining structured communication protocols for chain of command, emergency response, and stakeholder engagement and management
	Risk Management	Conducting risk assessments to identify potential impacts and the level of severity, defining management controls to avoid risk and/or mitigate impacts, and monitoring controls and incidents for continuous improvement
	Emergency Response	Developing a management system to plan for and respond to incidents, emergencies and security crisis situations, including communication protocols, procedures, and training
	Training	Capacity building for all stakeholders related to emergency response, operational procedures, improved quality assurance and control
2. PROCEDURES	Operations	Typically, operational management procedures are prescriptive actions supported by a management system that covers all aspects of the business's operations. They provide specific implementation steps that are connected to quality control, management controls for risk avoidance and mitigation, and operating above and beyond compliance. • Occupational Health and Safety • Customer Health and Safety • Environmental Management • Tourism Services

THEMES	PRIORITY AREA	OVERVIEW OF PRIORITY AREAS
3. PERFORMANCE	Framework Evaluation	Monitoring and evaluation approach that reviews all aspects of the management system and associated processes to determine its effectiveness and make changes as necessary.
	Performance Monitoring	Systematic, data-driven programme which establishes key performance indicators, monitoring protocols, and evaluation measures for numerous aspects of the management system including (but not limited to): compliance, training, risk assessments, emergency response, operational procedures, environmental sustainability, and stakeholder engagement.
	Continuous Improvement Plan	Based on a full evaluation of the management framework, key performance indicators, and stakeholder inputs, management system users create and implement a continuous improvement plan to guide further enhancements of the framework.

The users of quality management systems reflect the diversity of industries and business sectors worldwide. They include micro-sized businesses, global supply chain aggregators and Fortune 100 corporations.

The BSJ manages the development, implementation and enforcement of ISO standards through its firewalled arms- the National Certification Body of Jamaica (NCBJ), the Jamaica National Agency for Accreditation (JANAAC) and its enforcement arm, the National Compliance and Regulatory Authority (NCRA). The implementation of the ISO9001 Quality Management Standards falls under the direct remit of the NCBJ.

On the domestic front, the BSJ has adapted several ISO standards. These include standards applicable to quality (JS ISO 9000), environmental management (JS ISO 14001), and tourism services (JS 338/ISO 13009).[32] ISO 9001 is a driving force behind changes in most public and private institutions, organizations and businesses to facilitate the socio-economic transformation of the Jamaican society to achieve global competitiveness. Several MDAs are ISO 9001 certified. The Ministry of Industry, Commerce, Agriculture, and Fisheries; the National Health Fund; Jamaica North South Highway Company; the University Council of Jamaica (UCJ); the Coffee Industry Board of Jamaica; Transjamaican Highway Limited; and the Caribbean Maritime Institute have all developed a quality management system and had their efforts audited by a third party to show full compliance with the best practices. Other ISO systems standards such as ISO 17025, ISO 14000, ISO 22000 and ISO 50000 are used by various public and private entities in Jamaica.

Numerous local tourism enterprises have been third-party certified to a sustainability standard recognized by the GSTC. These include Sandals and Grand Palladium, certified by EarthCheck, and several other businesses certified by Green Globe, Travelife, and others. Blue Flag as well as other health and safety global certification programmes should be considered for promotion within the tourism sector.

[32] *Bureau of Standards Jamaica. (2019, June). Published Standards – March 2019. http://jbs.org.jm/articles/published-standards-march-2019.*

Table 4: Jamaican Entities and Tourism Enterprises That Have International Certification

CERTIFICATION BODY	STANDARD	JAMAICAN BUSINESSES CERTIFIED BY THIS STANDARD
GREEN GLOBE	GSTC-I	• Half Moon • HEART College of Hospitality Services • Hyatt Ziva and Hyatt Zilara Rose Hall • Jamaica Inn • Rockhouse Hotel • Royalton Blue Waters – Montego Bay • Royalton White Sands Resort • Sunset at the Palms • The Tryall Club
EARTHCHECK	GSTC-I	• Grand Palladium Jamaica Resort & Spa and Grand Palladium Lady Hamilton Resort and Spa • Green Grotto Caves • Sandals Royal Caribbea
TRAVELIFE (for tourism operators)	GSTC-I	• Caribic Group of Companies (partner status)
ISO	9001 – quality management	• Caribbean Maritime Institute • Coffee Industry Board of Jamaica • Jamaica North South Highway Company • Ministry of Industry, Commerce, Agriculture, and Fisheries • National Health Fund • Transjamaican Highway Limited • University Council of Jamaica (UCJ)

The major cruise lines operating in Jamaica also use international standards. Carnival, MSC Cruises, and Royal Caribbean Cruises Ltd. have gone through the rigorous process to have their fleet of ships certified to the ISO 14001 environmental management standard. Additionally, there are specific ISO standards for ship and marine technology that must be adhered to.

Cruise lines operate an extensive supply line with a diverse group of vendors that include shore excursion providers. Shore excursions are a vital part of the cruise experience. In most cases, the shore excursion operators are third-party tour operators offering services to cruise lines. To ensure these operators are offering a safe environment, Carnival Cruise Line requires shore excursion operators to submit a Health and Safety Management Plan following the structure of a quality management system. Royal Caribbean Cruises Ltd. has an ongoing Sustainable Shore Excursion Program that recognizes the importance of shore excursion operations to the overall experience of their guests and potential environmental impacts to the destination's natural and cultural environment. Royal Caribbean set a corporate social responsibility goal to have 50% of their excursions offered by tour operators who are third-party certified to a sustainability standard, to ensure a higher level of sustainability assurance through their excursions.

B. International Tourism Quality Standards

Of the 45 international quality standards, 23 standards were shortlisted for further research as the most highly regarded, widely implemented, and relevant to tourism quality assurance. This second phase of the research involved analysis of the contents of each standard, specifically the criteria and indicators that described process and prescriptive best practices.

These standards were grouped into Enterprise and Destination standards, to emphasize the primary user. Additionally, users within specific sectors of the tourism value chain were identified.

Most of the selected standards are process oriented and focus on management systems for a specific activity (e.g. risk management). This is true for both enterprise and destination standards. However, the GSTC-I and GSTC-D standards both address prescriptive best practices for managing tourism activities—an additional, proven quality assurance intervention for operational management. Therefore, when considering Jamaica's DAFS, it is important to consider how tourism enterprises can implement specific best practices within a destination-level quality management system.

Table 5: Shortlisted Enterprise and Destination Standards

	STANDARD	EXPECTED OUTCOME	TOURISM SUBSECTOR
ENTERPRISE STANDARD			
1.	ISO 9001 – QUALITY MANAGEMENT CERTIFICATION STANDARD	• Provide confidence in an organization's products and services and the organization's ability to achieve sustained success • Encourage the systematic improvement of the organization's overall performance through identification of risks • Increase in efficiency, productivity and profit while improving customer retention and satisfaction	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
2.	ISO 9004 – QUALITY ASSURANCE MANAGEMENT SYSTEM	• Provide guidance in managing for the long-term success of an organization • Provide guidelines for success by considering the quality of an organization • Address the improvement of the organization's overall performance	• Accommodations • Attractions
3.	ISO 14000 - ENVIRONMENTAL MANAGEMENT	• Identify, control, and improve the environmental performance of an organization's activities, products or services • Help implement a systematic approach to setting, achieving, and demonstrating environmental objectives • Provide assurance on environmental issues to the external stakeholders such as customers, community and regulatory agencies	• Accomodations • Attractions • Dive Operations • Tour Guides • Tour Operators • Transportarion
4.	ISO 31000 - RISK MANAGEMENT	• Increase the protection of an organization's assets • Increase competitive advantage by adopting a globally accepted risk management standard • Increase awareness and understanding of the organization's risks • Improve the reduction, mitigation and/or elimination of those risks • Help organizations see both the positive opportunities and negative consequences associated with risk • Improve an organization's governance and performance	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation

	STANDARD	EXPECTED OUTOCOME	TOURISM SUBSECTOR
ENTERPRISE STANDARD			
5.	ISO 45000 - HEALTH & SAFETY	• Improve employee safety by identifying and reducing risks • Foster management involvement and accountability	• Accomodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
6.	ISO 26000 - CORPORATE RESPONSABILITY	• Maximize organizations' contribution to sustainable development • Provide guidance on translating social responsibility principles into effective actions • Refine best practices that have already evolved and disseminate the information worldwide for the good of the international community	• Accommodations • Attractions • Tour Operators
7.	ISO 21401 - SUSTAINABLE ACCOMMO-DATIONS	• Direct accommodations establishments on the requirements of a sustainability management system covering environmental, social and economic dimensions of a tourism accommodation • Provide better-quality services to clients • Improve relationships with employees, suppliers, guests, local community, and local government	• Accommodations
8.	ISO 20611 – SUSTAINABLE TOUR OPERATIONS	• Provide requirements and recommendations for adventure tourism activity providers on good practices for sustainability • Outline how adventure tourism is directly linked with community development • Help support the sustainable development of tourism all over the world, creating more, and better, jobs	• Attractions • Tour Operators
9.	ISO 21101 - ADVENTURE TOURISM - SAFETY SYSTEMS	• Enhance safety performance • Meet expectations for participant and staff safety by demonstrating safe practice • Specify the minimum requirements for safety management systems and communication to participants	• Attractions • Dive Operators • Tour Guides • Tour Operators
10.	ISO 21102 – ADVENTURE TOURISM – GUIDE TRAINING	• Specify the minimum levels of training to ensure competence of adventure tourism activity leaders	• Attractions • Dive Operators • Tour Guides • Tour Operators
11.	ISO 21103 - ADVENTURE TOURISM - VISITOR COMMUNICATION	• Specify the minimum information that should be communicated to participants and potential participants before, during and after the activity to ensure safety	• Attractions • Dive Operators • Tour Guides • Tour Operators
12.	ISO 13009 - TOURISM - BEACH OPERATIONS	• Help beach operators make better-informed decisions about managing the beaches using a consistent approach based on best practice • Provide guidance for both beach operators and users regarding the delivery of sustainable management and planning, beach ownership, sustainable infrastructure and service provision needs, including beach safety, information and communication, cleaning and waste removal	• Accommodations • Attractions

	STANDARD	EXPECTED OUTOCOME	TOURISM SUBSECTOR
ENTERPRISE STANDARD			
13.	IFC PERFORMANCE STANDARDS & GUIDELINES	• Provide a framework for managing environmental and social performance through an outcomes-based approach • Provide detailed guidelines on: - Assessment and Management of Environmental and Social Risks and Impacts - Labour and Working Conditions - Resource Efficiency and Pollution Prevention - Community Health, Safety, and Security - Land Acquisition and Involuntary Resettlement - Biodiversity Conservation and Sustainable Management of Living Natural Resources - Indigenous Peoples - Cultural Heritage	• Accommodations • Attractions
14.	WORLD BANK ENVIRONMENTAL HEALTH AND SAFETY (EHS) GUIDELINES	• Provide detailed guidance for stakeholders to identify EHS project hazards and associated risks • Prioritize risk management strategies to help eliminate the cause of the hazard • Improve EHS performance through ongoing monitoring	• Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
15.	GLOBAL SUSTAINABLE TOURISM CRITERIA FOR INDUSTRY (GSTC-I)	• Develop a sustainability management system for tourism enterprises using universally accepted best practices which include: - Effective sustainability planning - Maximizing social and economic benefits for the local community - Enhancing cultural heritage - Reducing negative impacts to the environment	• Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
DESTINATION STANDARDS			
16.	ISO 9001 - QUALITY MANAGEMENT CERTIFICATION STANDARD	• Provide confidence in an organization's products and services and the organization's ability to achieve sustained success • Encourage the systematic improvement of the organization's overall performance through identification of risks • Increase in efficiency, productivity and profit while improving customer retention and satisfaction	• Destination Management Organization • National Tourism Offices
17.	ISO 31000 - RISK MANAGEMENT	• Increase the protection of an organization's assets • Increase competitive advantage by adopting a globally accepted risk management standard • Increase awareness and understanding of the organization's risks • Improve the reduction, mitigation and/or elimination of those risks • Help organizations see both the positive opportunities and negative consequences associated with risk • Improve an organization's governance and performance	• National Tourism Office • Municipalities • Destination Management Organizations
18.	ISO 22320 - SECURITY AND RESILIENCE, EMERGENCY MANAGEMENT	• Provide basic components of incident management including process and structure, which focus on roles and responsibilities, tasks and management of resources • Improve decision-making skills during crises • Provide guidance on command and control structure • Provide principles to communicate the value and explain the purpose of incident management • Enhance skills to manage complex and stressful events	• National Tourism Office • Municipalities • Destination Management Organizations

STANDARD		EXPECTED OUTOCOME	TOURISM SUBSECTOR
DESTINATION STANDARDS			
19.	ISO 37000 - GUIDANCE FOR THE GOVERNANCE OF ORGANIZATIONS	• Helps to reflect the identity, mission or purpose of the organization with respect to society and its stakeholders • Aims to provide guidance on: • Clarifying the distinction between the governance realm and the management realm • Supporting compliance frameworks within existing national legislation, regulation, or organizational policies • Facilitating the setup of a clean and complete design of the governance of an organization, as a system	• Destination Management Organizations
20.	ISO 37101 - SUSTAINABLE DEVELOPMENT IN COMMUNITIES	• Help communities define their sustainable development objectives and put in place a strategy to achieve them • Define the broad principles of what a community may wish to achieve with a sustainable development strategy • Emphasize the wide variety of players that need to be involved in the management of real-life projects in cities and communities	• National Tourism Office • Municipalities • Destination Management Organizations
21.	ISO 13009 - TOURISM BEACH OPERATIONS	• Help beach operators make better-informed decisions about managing the beaches using a consistent approach based on best practice • Provide guidance for both beach operators and users regarding the delivery of sustainable management and planning, beach ownership, sustainable infrastructure and service provision needs, including beach safety, information and communication, cleaning and waste removal	• Municipalities • Destination Management Organizations
22.	ISO 20858 - PORT FACILITY SECURITY	• Address the execution of marine port facility security assessments, marine port facility security plans and the skills and knowledge required of the personnel involved • Assist in the implementation of the International Maritime Organization's International Ship & Port Security (ISPS) Code • Ensure that the completed work meets the requirements of the ISPS Code • Specify the necessary competence of personnel to conduct a marine port facility security assessment	• Port Authorities • Destination Management Organizations
23.	GLOBAL SUSTAINABLE TOURISM CRITERIA FOR DESTINATIONS (GSTC-D)	• Build capacity among destination stakeholders in the principles of sustainable tourism and sustainable destination management • Gain practical tools to compare sustainability performance across the major areas of destination sustainability • Improve destination governance, policymaking, stakeholder engagement, and performance in the areas of sustainability management, economic development, community and cultural well-being, and environmental conservation • Prioritize urgent, important, and achievable next steps to address the destination's sustainability risks • Develop a baseline for sustainability monitoring	• Municipalities • Destination Management Organizations

C. Regional Tourism Quality Standards

Three regional (Caribbean) quality assurance programmes and standards were identified as part of the review of international standards. These standards are managed by regional tourism associations.

The Hospitality Assured (Caribbean) certification programme is a temporarily funded short-term programme aimed to significantly improve service quality standards and build a culture of service and business excellence in the region's SMTEs by considering all aspects of the customer's experience. The programme takes a quality management system approach using rigorous process-oriented standards for service quality and business excellence. It is an ongoing process which includes indicators that the business can use to continually measure its performance. The programme considers all aspects of service from the customer's point of view. It is an ongoing process that provides a series of performance indicators an organisation can continually judge and measure itself against, covering nine key areas: Customer Research; The Customer Service Promise; Business Leadership & Planning; Operational Planning & Standards of Performance; Resources (people, equipment, facilities); Training & Development; Service Delivery; Service Recovery; and Customer Satisfaction Improvement. The Hospitality Assured service quality framework meets the requirements of the European Foundation for Quality Management Excellence Model.

The Regional Tourism and Health Program (THP) is managed by the Caribbean Tourism Organization (CTO) in partnership with the Caribbean Public Health Agency (CARPHA). This unique programme uses a multi-faceted and multi-sectoral real-time early warning and response system for a Tourism and Health Information System (THiS) that consists of regional guidelines for managing public health issues associated with cruise and stayover visitors. This multi-pronged approach stimulates a rapid and coordinated response to public health threats, including COVID-19. The ultimate goal is to improve the health, safety, quality and sustainability of the Caribbean tourism industry and thereby contribute to the industry being more competitive, sustainable and profitable.

The Association of Caribbean States (ACS) established the Sustainable Tourism Zone of the Greater Caribbean (STZC) in 2001 and defined sustainability indicators for destinations in 2005. The STZC seeks to assist destinations in balancing tourism growth while ensuring the well-being of the community and protection of the environment. The Regional Sustainable Tourism Indicators that have been agreed to by ACS member states serve as guidelines to evaluate and help improve sustainability of tourism destinations. The Resort Area of Ocho Rios was one of the destinations that participated in the pilot project in 2006. It is not clear if the destination assessment resulted in any concerted multi-sectoral destination-level sustainability efforts.

These regional programmes illustrate the diversity of ways an organisation can implement quality management systems. From customer service and satisfaction to managing public health, a well planned and implemented quality management system can meet regulatory, customer, and organisational objectives while also improving effectiveness and efficiency on a continuous basis.

Table 6: Shortlisted Regional Standards

	PROGRAMMES	THEMES OF EXPECTED OUTCOMES	TOURISM SUBSECTOR
ENTERPRISE STANDARD			
1.	HOSPITALITY ASSURED	• Improved service quality standards • Well-developed service ideals, values and principles that support a culture of excellence • Increase in customer satisfaction and loyalty • Increased market share • Improved staff morale • Great public relations and a strong marketing tool • Recognition by peers in the industry • Benchmarking data provided for comparison purposes • Continuous improvement through recertification every two years	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
2.	REGIONAL TOURISM & HEALTH PROGRAM (THP)	• Healthier, safer populations; strengthened adherence to International Health Regulations, improved regional and global health security • Enhanced capacity for disease surveillance and response, to mitigate against travel-related health, safety and environmental threats, to guide public health interventions • Real-time health tracking system for timely alerts and rapid response to travel related illness • Complement and strengthen CARPHA's syndromic surveillance, increasing their ability to detect communicable diseases (CD) outbreaks and other emerging public health threats in the Caribbean • Reduction in the risk posed to people in the Region by CD outbreaks and public health emergencies • Strengthened preparedness for emerging diseases and public health emergencies • Strengthened multi-sectoral collaboration and partnerships for addressing travel related illnesses	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
DESTINATION PROGRAMMES			
3.	SUSTAINABLE TOURISM ZONE OF THE GREATER CARIBBEAN (STZC)	• "To achieve the establishment of the Sustainable Tourism Zone of the Caribbean (STZC) as a geographically determined cultural, socio-economic and biologically rich and diverse unit, in which tourism development is based on the principles of sustainability, integration, cooperation and consensus."[33] • Provides "tangible and practical tools for selection and evaluation of tourism destinations to become part of the STZC".[34] • Programme indicator themes: - Policy and planning - Environmental management systems - Sustainable management of energy, waste, water, and pollution - Cultural heritage - Equality and employment - Community engagement - Economic impacts - Safety and security - Hospitality	• Destination Management Organization • Nationttal Tourism Office

[33] *Association of Caribbean States. (2017). Sustainable Tourism. http://www.acs-aec.org/index.php?q=sustainable-tourism.*
[34] *Association of Caribbean States. (2017).*

D. National Quality Assurance Programmes – International Case Studies

Twelve national quality certification programmes were reviewed to gain an understanding of the management, governance, and organisational functions of successful quality and sustainability assessment programmes for tourism enterprises and local tourism destinations. Desktop research included scholarly articles, government documents, and national programme websites.

Research was conducted into programmes administered by countries similar to Jamaica, including Caribbean destinations and Small Island Developing States. However, the research produced few results. Some documentation was found on quality certifications used in Costa Rica, Mexico, and the Seychelles, but information was quite limited, and there was either no actual programme or in the case of Belize, the programme is nascent.

Country programmes reviewed were administered by Australia, Canada, England, Ireland, Malaysia, Morocco, New Zealand, Norway, Slovenia, South Africa, Switzerland and Thailand. Quality assurance programmes were assessed in the context of:

1. Programme goals
2. Governance and organizational structure of a programme
3. Scope of a programme's certification schemes including mandatory and voluntary components
4. Operations and management of a programme
5. Sustainability of a programme including funding and participant uptake

A detailed table summarizing key findings for all twelve destinations is included in the DAFS Situation Analysis Report held by the Ministry of Tourism.

Six national programmes were shortlisted for further research. Interviews were conducted with programme managers from these programmes in order to gain a deeper understanding of programme implementation and use, management challenges, metrics of success, and unique qualities of each programme that might be applied to the DAFS. The shortlisted programmes are shown in Table 7.

Table 7: Shortlisted National Quality Assurance Programmes

	COUNTRY	PROGRAMME
TOURISM ENTERPRISES	AUSTRALIA	Australia Quality Tourism Framework
	ENGLAND	Visitengland Quality Schemes
	NEW ZEALAND	Qualmark
	SOUTH AFRICA	Tourism Grading Council of South Africa Quality Assurance Programme
TOURISM DESTINATIONS	NORWAY	Innovation Norway Sustainable Destination Standard
	SLOVENIA	Green Slovenia Scheme

An in-depth discussion of the main findings follows.

Programme Goals

Quality assurance programmes are created with the ultimate goal of enhancing visitor satisfaction. Quality and sustainability programmes are leveraged by national tourism offices and **Destination Marketing Organizations (DMOs) to improve a destination's competitiveness and help local tourism enterprises meet customer expectations. These programmes exist to provide potential customers with the confidence that the hotel, tour, or experience they are choosing will meet a widely accepted level of quality.** For example, in England the first quality assurance programme was created by the Automobile Association in the early 1900s as a way of providing car owners with the confidence of the association's recommendations of lodging options available along popular travel routes. This sector level certification programme was eventually expanded to other subsectors and rolled out at the national level, growing from a review of accommodations only to later include other tourism enterprises such as attractions and tour operators.

As global trends towards sustainability have grown, quality assurance programmes too have increasingly promoted the adoption of sustainability practices. All of the six programmes assessed include sustainability criteria and good practices for tourism enterprises in various ways. Sustainability-oriented standards include criteria and best practices for tourism enterprises across management systems, socio-economic factors, and environmental stewardship.

Over the past decade there has been a growing movement to respond to the changes, often negative, occurring in destinations due to uncontrolled growth in tourism. The GSTC was one of the first organizations to develop a global standard for destination sustainability. In r**ecent years, countries such as Norway and Slovenia have established national standards and certification programmes for their local destinations.** These programmes are dedicated to the measurement and promotion of sustainability at a local destination level. For example, Innovation Norway Sustainable Destination Standards consists of over 100 criteria covering environmental, social, economic and managerial factors [35]

Overall, **quality assurance programmes exist to inspire and support continuous improvement of a tourism enterprise and destination, with the intended goal of providing visitors with a high degree of satisfaction.**

Governance

In most cases, national quality assurance programmes for tourism enterprises have shared ownership and management. **The government usually owns the brand and the actual standards of the programme through the national tourism board, and will often license out the programme to industry trade associations who manage certification for tourism enterprises.** Quality assurance programmes operated through associations provide certification at the individual business level, and focus on providing businesses with advice and guidance for improvements. It is important to underscore that **quality certification programmes are voluntary and do not focus on compliance with regulations. Mandatory requirements and standards (fire and safety, health and hygiene, permits and licences) are managed by regional and local government entities such as states, provinces or municipalities,** and require a degree of coordination between the quality assurance programme and the correct government entity. Though certification programmes will make note of whether a business has completed legal requirements, this does not tend to preclude their participation in a quality assurance certification programme. To the degree possible, programme operators rely on municipal and provincial entities to monitor and manage mandatory requirements for tourism enterprises.

Tourism boards also own the brand and national standard for local destinations. In many cases the **Tourism boards also manage the destination sustainability certification programme.** Destination sustainability certification programmes are all voluntary. The national tourism board coordinates assessments and advisory functions through DMOs at either a provincial or municipal level. The certification process oftens spans two or three years.

Scope

The vast majority of **national quality assurance programmes are voluntary for participants to join, and uphold principles of continuous improvements of businesses.** Some programmes do require businesses to meet basic licensing requirements to earn an entry-level grade and be considered for higher accolades/certifications in the programme. Programmes with this entry-level requirement exist in Australia, Ireland, Thailand, Canada, and Morocco.

[35] *Global Sustainable Tourism Council. (2018). Innovation Norway Sustainable Destination Standard is Now a GSTC-Recognized Standard. https://www.gstcouncil.org/innovation-norway-sustainable-destination-standard-is-now-a-gstc-recognized-standard/.*

There are a few different approaches for the standardization of tourism quality among tourism enterprises. All the programmes assessed include a categorization and certification scheme for hotels, organizing them based on levels—the most popular being star ratings or medal awards (gold, silver, bronze). Certification schemes for other tourism sectors such as tour operators, attractions and restaurants are also voluntary and have their own standards, which focus on continuous improvement of performance. Renewed on an annual basis, tourism enterprise schemes generally assess a range of criteria including physical spaces, health and safety requirements, visitor interactions, and quality of services provided. **Shortlisted programmes that focus specifically on tourism enterprises have faced persistent challenges in generating interest in and incorporating sustainability standards within their existing quality assurance programmes.** New sustainability standards can require businesses to invest more capital, resources, and staff time without a significant increase in the value of the certification, star-rating or award, especially if the standards are part of a voluntary programme.

Programmes at the destination level measure quality through sustainability criteria that include all key pillars of sustainability: economic viability, community involvement, social needs, culture, and the environment. For example, Innovation Norway has enrolled over 35 destinations to implement and monitor 45 sustainability criteria and 108 indicators. With the involvement of many stakeholders, the process for destinations to become certified is longer, generally two or three years. As with tourism enterprises, the process for a destination begins with an application and assessment. However, once an initial assessment is completed, destination municipalities and associated tourism enterprises are required to make an official commitment to begin the implementation of projects to address the sustainability criteria. Destinations are required to monitor concurrently with project implementation, and provide a report to be evaluated for potential certification at the end of the implementation phase.

Programme Operations and Management

Regardless of whether the programme is operated from the Tourism Board (Tourism Grading Council of South Africa) or licensed out to trade associations (VisitEngland schemes run by the Automobile Association), **most national quality certification programmes have automated the quality management system.**

At the tourism enterprise level, the process often starts with tourism enterprises conducting a self-assessment as part of their initial application, and a database system creating a report for an assessor to review and use as the basis for their on-site visit. Programme managers indicated that having an automated system is helpful in reducing human error, increasing efficiency, and facilitating the flexibility needed to add in new schemes or standards (e.g. new COVID-19 health- and safety-related certifications). Most enterprise programmes require an annual renewal of certification and include an on-site visit by a trained assessor (this includes scheduled and mystery visits).

Assessors play an essential role within the assurance programme for tourism enterprises. It is common practice to have a third-party company or contracted individuals provide the actual assessment services. Assessors are generally well-trained, seasoned industry professionals with years of experience assessing various accommodations and other tourism enterprises. **Not simply there to "check a box", assessors provide the greatest value in providing business owners and operators with specific recommendations and sharing best practices gleaned from seeing other business operations over many years.**

For destination-focused programmes, the process begins with an assessment of the viability of the destination to participate in the programme. In the case of Norway, after a destination is chosen, Innovation Norway supports the destination through a series of implementation and monitoring processes. **The municipal council is pivotal in the success of implementing and monitoring standards, and must commit to the development of sustainable tourism.** Tourism enterprises within the destination provide similar commitments. After commitments are made, the implementation of standards begins, which includes a range of projects touching on areas such as energy saving initiatives, food and culture, wayfinding, and transportation. Monitoring and evaluation of these various projects is essential to the long-term success of the standards and is conducted concurrently with implementation.[36]

Key performance indicators for both tourism enterprise and destination programmes are generally quantitative, although quality is recognized as equally important. **Primary indicators include the numbers of businesses or destinations enrolled and retained in the programme. Additionally, some tourism boards recognize that the destination's brand and competitiveness can also be considered indicators of success, though much harder to demonstrate.**

[36] *Global Sustainable Tourism Council (2018).*

Programme Sustainability

Based on findings from interviews with six diverse quality/sustainability accreditation programmes, **all programmes face challenges in enrollment and retention of participating businesses**. Additionally, despite participation fees, all programmes are subsidized to some degree.

Tourism enterprise–focused programmes appear to be most appealing for new businesses who are just getting started or have reached a development threshold where they need business advice from industry experts. **Business advice from seasoned professionals is the number one incentive of programmes. Marketing support on behalf of the bourism board is the second largest incentive for businesses, though this is only applicable to some programmes.** Competitive fees, discounts, and special access to suppliers have also proven to be an incentive for participants to join and continue within a programme.

Online rating platforms such as Tripadvisor have caused significant disruptions to traditional quality assurance programmes. Developers and managers of quality assurance programmes are looking for creative ways to continue to provide value and be more flexible to meet business needs as a way to compete with online rating platforms. **Increasingly, quality assurance programmes are being framed less as a way to organise businesses according to levels of quality (level 1, 2, 3, etc.), and are focused more on providing tourism enterprises with advice and resources to meet their own goals and contribute to the success of a destination overall.**

For destinations, sustainability and quality standards programmes are an integral part of a tourism board's success in marketing the national tourism brand and improving a destination's competitive standing. For example, Green Slovenia's programme has been essential in the development and promotion of emerging destinations while simultaneously elevating the overall brand of Slovenia as a quality destination. In a July 2020 interview, Albert Salaman of Green Destinations said that the success of the programme has driven more destinations across the country to enrol in the programme and implement sustainability standards within their municipalities and tourism enterprises, and has put new destinations within Slovenia on the map. As with tourism enterprise programmes, guidance and knowledge-sharing from industry and sustainability experts is a prime benefit to DMOs, municipal councils, and tourism operators. The assessment of a destination's needs and the length of time dedicated to implementation of projects that help to meet sustainability criteria provides incomparable opportunities for improvement and capacity building to a range of stakeholders throughout the destination.



E. National Tourism Quality Standards – International Case Studies

The national quality assurance programmes assessed consisted of a set of standards designed for specific subsectors of the tourism industry. These standards focus on the criteria or areas of good practice that each programme has deemed most important to ensure customer satisfaction, and on continuous improvement of tourism enterprises and destinations.

As seen in Table 8, four of the six programmes primarily focused on tourism enterprises (England, South Africa, Australia, and New Zealand), and two programmes measured quality assurance at the destination level (Norway and Slovenia).

All national quality assurance programmes have specific criteria for accommodations, and most include separate criteria for other entities such as attractions, tour operators, or venues. At the destination level, both Norway's and Slovenia's programmes have received GSTC's "GSTC-Recognized"37 standard status, demonstrating a commitment to holding destinations across their nations accountable to nationally recognized standards of sustainability in tourism management, culture, economics, and the environment.

Table 8: Shortlisted National Quality Assurance Programme Standard Themes

	PROGRAMME	THEMES (Criteria)	TOURISM SUBSECTOR
TOURISM ENTERPRISE STANDARDS			
1.	VISITENGLAND QUALITY SCHEMES	• Cleanliness • Bedrooms • Bathrooms • Services and efficiency • Food quality • Hospitality and friendliness • Dining room and restaurant • Exterior • Public Areas	Accomodations: hotels, B&Bs, self-catering properties, hostels, serviced apartments and caravans
		• Cleanliness • Reception and reception services • Park facilities (shops, bar, clubs, restaurants and takeaways, launderette and drying room) • Recreation, sport and leisure • Park grounds • Toilet and washing facilities	Accomodations: holiday parks, camp sites and glamping sites
		• Pre-Arrival (online presence, leaflet/brochure) • Arrival (car park, first impressions, layout and entropy, visitor information and signage) • The Attraction (layout, visitor information, grounds, buildings) • Cleanliness • Toilets • Catering • Retail • Staff (appearance, admissions, guides, volunteers, gardeners, catering, retail)[38]	Visitor Attractions: museums, art galleries, safari parks, gardens, historic houses, theme parks and more

[37] GSTC-Recognized means that a sustainable tourism standard or system has been deemed equivalent to the GSTC Criteria for sustainable tourism and is administered by a standard/system owner that meets GSTC requirements. See https://www.gstcouncil.org/certification/achieve-gstc-recognized/.

	PROGRAMME	THEMES (Criteria)	TOURISM SUBSECTOR
TOURISM ENTERPRISE STANDARDS			
2.	Tourism Grading Council of South Africa Quality Assurance Programme[39]	• Exterior • Bedrooms • Bathrooms • Public Areas • Food and Beverage Facilities • General Services and Service • Housekeeping	Accommodations: formal, boutique, guest
		• Exterior • Bathrooms and ablutions • Sculleries and camp kitchens • Laundry and drying areas • Caravan/camping sites • Reception and public areas • Housekeeping • Communal braai areas and bomas • Recreational facilities • Shops, bars, bottle stores and/or takeaways • Services offered	Accommodations: self-catering, caravans, campgrounds, backpackers and hostels
		• Exterior • Venues/rooms and event support areas • Public areas • Dining and refreshment facilities • Services	Venues
3.	AUSTRALIA QUALITY TOURISM FRAMEWORK[40]	• "Quality Tourism Essentials: Development of minimum quality and safety standards for customers…. Signifies quality assurance and the delivery of quality tourism experiences." • "Sustainable Tourism: High quality visitor experience development…. Minimum environmental standards for activities in protected areas. Prerequisite: Quality Tourism Accreditation." • "Digital Distribution Marketing Essentials. Encourage industry to ensure they are meeting best practice standards relating to digital experience of the customer throughout the visitor journey. It will develop businesses to better understand the impacts of digital on their current operations and encourage them to have a high level of understanding of digital marketing, distribution and technology, allowing them to be fast followers in terms of adoption of new technologies." • "Trade Marketing Boost will assist businesses to identify appropriate markets, develop their product to meet their target market's needs and expectations and to implement business practices required to work within the travel distribution system." - Niche Modules - EcoStar Accreditation - Camps and Adventure Accreditation - International Ready Accreditation - Marine Tourism Accreditation - Star Ratings Accreditation - China Ready Accreditation - Visitor Centre Accreditation - Australian Tourism Awards - COVID19 Business Recovery - COVIDCLEAN Practicing Busines	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation

[38] *VisitEngland. (2020). VisitEngland Quality Schemes. https://www.visitengland.com/plan-your-visit/visitengland-quality-schemes.*
[39] *Tourism Grading Council of South Africa. (2020). Grading Criteria Booklet. https://www.tourismgrading.co.za/assets/Uploads/10031125-TGCSA-Grading-Criteria-Booklet-REV-20.pdf.*

	PROGRAMME	THEMES (Criteria)	TOURISM SUBSECTOR
TOURISM ENTERPRISE STANDARDS			
4.	NEW ZEALAND QUALMARK	• Economic - Operations manual/standard operating procedures - Marketing plan - Reservations and payments - Business information - Business planning - Asset register/maintenance plan	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
		• Social and People - Job management - Service standards and product knowledge - Staff training - Customer feedback - Team culture - Community engagement/social licence - Industry engagement • Environment and Culture - Energy and resource - Discharge and waste - Customer engagement/involvement - Staff engagement/involvement - Investment and enhancement of operating environment - Hosting other cultures - Cultural interpretations and integration - Embracing manaakitanga • Health, Safety and Wellness - Reporting and recording - Investigating and improving - Staff engagement, participation and training - Leadership - Staff wellness	• Accommodations • Attractions • Dive Operators • Tour Guides • Tour Operators • Transportation
DESTINATION STANDARDS			
5.	INNOVATION NORWAY SUSTAINABLE DESTINATION STANDARD	• Ecotourism Norway: "Awarded to businesses and operators that hold a high international level in ecotourism. Over 100 strict criteria on environmental performance, host-role, local community integration, and purchasing must be met and often improved." • The ecolabel Nordic Swan: "Indicates that they satisfy strict demands within energy efficiency, materials, and chemicals, all the way from raw materials to end product and waste management." • "Eco-Lighthouse enterprises work towards satisfying requirements and implementing environmental measures on a systematic and ongoing basis in order to create more environmentally friendly operations and safer work environments." • Green Key: "Global ecolabel, recognized by GSTC, for hotels, small accommodations, campsites, and attractions. Certified businesses must meet strict criteria for waste, energy, water, procurement, green areas, CSR, and staff involvement."	Businesses, Municipalities, and Destination Management Organizations

[40] *Australian Tourism Industry Council. (2020). Quality Tourism Programmes – Accreditation. https://qualitytourismaustralia.com/home/accreditation/.*

PROGRAMME		THEMES (Criteria)	TOURISM SUBSECTOR
DESTINATION STANDARDS			

		• "ISO 14001 is given to enterprises that have a high-quality environmental management system for organizational performance."
		• Blue Flag: "Global, prestigious award based on a series of stringent environmental, educational, safety-related and access related criteria to be met and maintained, aimed at beaches, marinas and sustainable boating tourism operators."
		• Destination Standards:
		  - Designed to measure, manage, and direct change
		  - All-in-one management and monitoring framework
		  - Process becomes as important as the results
		  - Supportive of the process with funding and capacity"[42]	

6.	GREEN SLOVENIA SCHEME	• Destination management • Nature and scenery • Environment and climate • Culture and tradition • Social well-being • Business and hospitality[43]	• Municipalities • Destination Management Organizations



[41] *New Zealand Qualmark. (2020). How Qualmark Works. https://www.qualmark.co.nz/en/learn-about-us/how-qualmark-works/*
[42] *Innovation Norway. (2020). Visit a more sustainable destination. https://www.visitnorway.com/plan-your-trip/green-travel/sustainable-destinations/.*
[43] *Green Slovenia (2020). Green Destination Standard 1.4.2. http://greendestinations.org/wp-content/uploads/2017/11/Green-Destinations-Standard-1.4.2.pdf.*

4. Assessment of Jamaica's Destination Assurance

Jamaica refers to its national tourism quality assurance programme as Destination Assurance. Throughout this framework and strategy, the term Destination Assurance is used interchangeably *with a tourism quality assurance system.* The term—Destination Assurance—is neither common nor widely used in the tourism industry at a global level. This provides Jamaica with a unique opportunity to trademark the term and promote it as its brand for the evolving national tourism quality programme.

Jamaica's National Destination Assurance Programme aims to deliver a total experience that meets or exceeds what has been marketed, and what visitors expect, in brand Jamaica. Its main goals are to ensure the safety, security and seamlessness of the Jamaican tourism product.

To inform the findings, more than 30 documents were reviewed, tourism legislation, policies, programmes, plans, tourism compliance requirements. There was also a review of frameworks that support seamlessness, monitoring and governance arrangements and conducted a preliminary interview with TPDCo.

This section of the Situation Analysis provides an in-depth look at the evolving governance and organizational structure for Destination Assurance, the complex legislative framework for quality assurance, the existing standards and licensing requirements, and compliance.

A. Governance

The overarching legislative framework for tourism quality management is complex and dynamic. While Jamaica's Tourist Board Act (1955) is the primary legislation for quality assurance in the tourism industry, there are supporting laws in areas such as health, planning, security, environmental management, financial incentives, labour and workforce protection, and tourism development as well as regulations that empower parish councils to oversee development.

The JTB is responsible for administering the Tourist Board Act. The main functions granted to the JTB are licensing, product development, and marketing and promotion. In 1996, through subsequent amendments to the Tourist Board Act (1955), the TPDCo became an executing agency of the JTB. The primary responsibilities assigned to TPDCo are product development, management of the licensing process, product quality assessment and standards development.[44]

Prior to 2017, TPDCo managed and monitored product quality in the tourism resort areas through advisory groups composed of industry representatives and known as resort boards. The resort boards were charged with determining the main issues relevant to product development and licensing for their respective region and working with TPDCo to address them. The resort board programme of work was decentralized and operated with secretarial support from TPDCo.

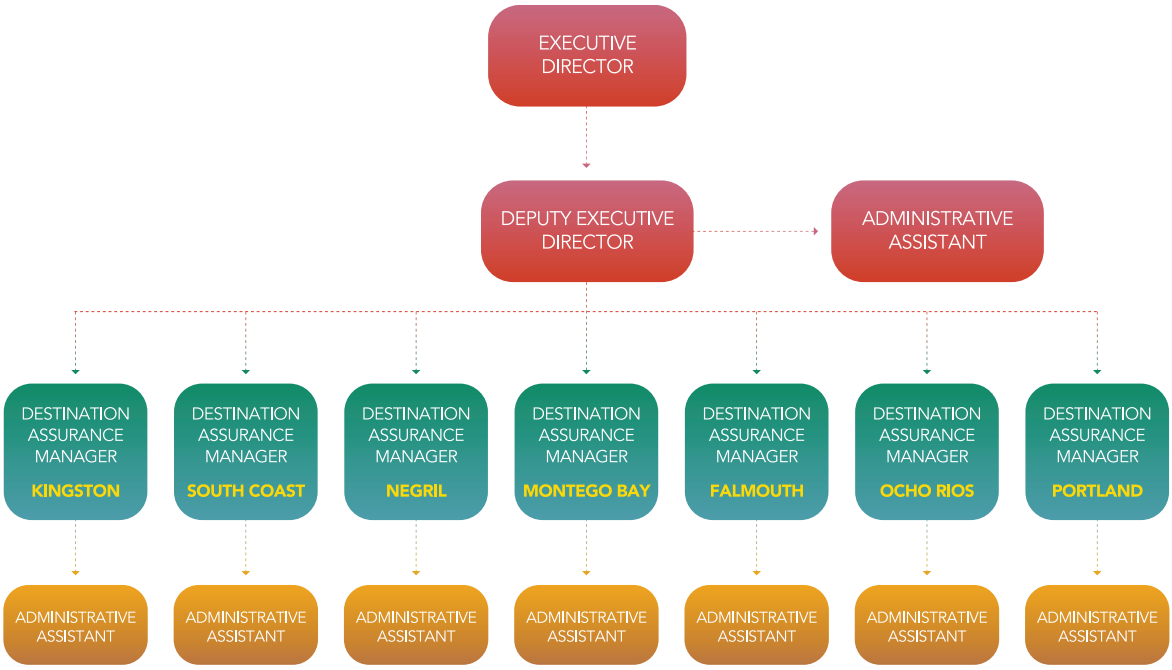
TPDCo is the agency which issues licences to operate for all regulated tourism entities and is the chief implementing agency of the quality assurance system. It is mandated by the Tourist Board Act (1955) to license and assess entities to ensure that quality standards required for licensing are being met, and to implement the directives of the Ministry of Tourism which seek to develop and maintain the integrity and quality of the tourism product.

In 2017, as a result of sustained growth in tourism and notable emergent issues that presented tremendous risks to destination reputation, the Minister of Tourism, Hon. Edmund Bartlett, in his 2017/2018 sectoral budget presentation highlighted issues surrounding sustainable tourism and juxtaposed concerns raised about the state of resort towns.[45] The issues ranged from poor collection of garbage and poor aesthetics to a lack of coordination among critical state agencies and poor consultation processes. To respond to these emergent issues, Minister Bartlett announced the establishment of DACs in the main towns to replace the resort boards. The DACs are charged with:

[44] *Ministry of Tourism. (2020). Changes to the Jamaica Tourist Board Act (January 2019).*

- Providing oversight for the development of each resort area by facilitating coordination and collaboration among public and private stakeholders.
- Monitoring and ensuring that operators are in compliance with standards and licensing requirements.
- Sharing responsibility for the management of the resort area as a sustainable tourism destination in order to maintain integrity of the tourism product.
- Implementing programmes that reduce the levels of visitor harassment in resort areas, especially in cruise ports, to improve visitor safety and visitor satisfaction.
- Developing local tourism activities that are accessible and appealing to Jamaicans.

Figure 7 illustrates the current governance framework for Destination Assurance in Jamaica.



Source: TPDCo

The DAC members consist of leaders who represent the public and private sectors, such as the mayor, and representatives of the Health Department, the National Water Commission, the Fire Brigade, the National Environment and Planning Agency (NEPA) and all agencies needed to secure the integrity of the destination. Members provide technical, financial, human or in kind resources that put into action solutions that address priority issues. Each council is led by a chairman who is appointed by the Minister of Tourism. According to the Terms of Reference for the DAC, through its Chair, it is accountable to the Minister of Tourism. The Council shall submit to the Minister through TPDCo's Destination Manager a written report immediately following the meeting of the Council.

Furthermore, each DAC is assigned a Destination Manager at TPDCo who provides administrative support and coordinates the work of private, non-governmental and governmental agencies on the ground.[46] The TPDCo destination manager is the most direct link to the DACs (Figure 8). The DACs are designed to achieve faster resolution of issues with fewer meetings.

[45] *Ministry of Tourism. (2018). Concept Paper towards the development of a Destination Assurance framework and Strategy.*
[46] *TPDCo. (2015). Destination Assurance Councils. https://www.tpdco.org/dac.*

Figure 8: Governance Framework for Destination Assurance Council



ource: Jamaica Ministry of Tourism



B. Legislative Framework for Destination Assurance

Jamaica's quality assurance management framework is governed by laws, policies, plans and programmes that relate to the tourism sector as well as by those that are not tourism specific but that provide guiding standards and systems which create a quality management and monitoring framework for effective management of all supporting sectors and systems.

A comprehensive listing and description of the laws, policies, plans and programmes that enable tourism quality assurance in Jamaica is included in the DAFS Situation Analysis Report held by the Ministry of Tourism. These all serve to guide development and delivery of the tourism product, ensure visitor safety and security as well as protect tourism workers.

This section presents the main takeaways from the comprehensive review of laws, policies, plans and programmes that enable tourism quality assurance in Jamaica.

Quality Assurance Management

The National Development Plan (NDP) Jamaica – Vision 2030 is an overarching plan for development of Jamaica and provides a strategic road map to guide the country to achieve its goals of sustainable development and prosperity by 2030. Outcome #12 of the plan supports growth of industry structures, one of them being tourism.

The Vision 2030 Tourism Sector Plan affects all tourism enterprises, as it seeks to provide opportunities for inclusion and participation in the tourism sector by Jamaicans; fill more positions in tourism with suitably qualified and skilled Jamaicans; foster an economically viable and integrated sector that can drive economic growth; diversify the tourism product and showcase the unique cultural character of Jamaica and provide a safe, secure and sustainable tourism product.

There are strong implementation and monitoring frameworks in place for Vision 2030. Various programmes implemented directly by the MOT and its agencies also support quality assurance management for the sector. These include product development, product enhancement and sustainable tourism programmes.

It is important to note that Jamaica's Tourism Master Plan for Sustainable Development is currently being updated. The updated version of this plan, the Tourism Strategy and Action Plan, will continue to provide a blueprint for the development of tourism in Jamaica and will have guidance for product development and quality assurance.

The Ministry of Tourism's Programme Structure for 2020 provides an institutional framework for planning and management of the growth of tourism.

The Micro, Small and Medium Enterprises (MSME) and Entrepreneurship Policy of 2017 seeks to increase the participation of SMTEs and improve their viability through assistance in improving productivity, competitiveness, financing, and business development and meeting international standards.

The Tourist Board Act is the primary legislative and governance framework for the tourism industry that establishes the Tourist Board and charges it with the duty of developing the industry. The Tourist Board Act is supported by the Bureau of Standards Act which promotes and supports standardisation for tourism services, the Public Health Act which facilitates permits for food establishments in tourism and also regulates sanitation, water quality and other parameters, and the Town and Country Planning Act which regulates tourism development and standards for building. The Spirits Licence Act is also important, as it regulates the sale of alcohol, grants licences to sell, and determines standards for locations where alcohol is consumed such as tourist establishments which serve alcohol.

The National Quality Policy clarifies the role of the BSJ and describes strategies for achieving a culture of quality, developing a national quality management system, and establishing an infrastructure for its implementation. This new direction has resulted in BSJ focusing on its standards development and on provision of quality support services roles. Hence, accreditation services are now provided by the Jamaica National Agency for Accreditation (JANAAC), certification services are provided by National Certification Body of Jamaica (NCBJ), and regulatory functions are now offered by National Compliance and Regulatory Authority (NCRA). The changes were influenced by feedback from some industry stakeholders and experts that there were conflicting interests between the BSJ's regulatory and technical assistance roles as well as requirements under the World Trade Organization Technical Barriers to Trade (TBT) Agreement.

The Public-Private Partnership Programme for the Government of Jamaica Policy 2012 establishes a partnership between public and private entities to develop, fund and build infrastructure and other capital investment intensive assets that have a long-term horizon. This has implications for plans for the development of infrastructure in resort areas. In addition, the Draft National Investment Policy 2018 aims to attract increased investment in Jamaican businesses which will help to increase the carrying capacity in many of the resort areas and conduct necessary infrastructure improvements.

Standards Development

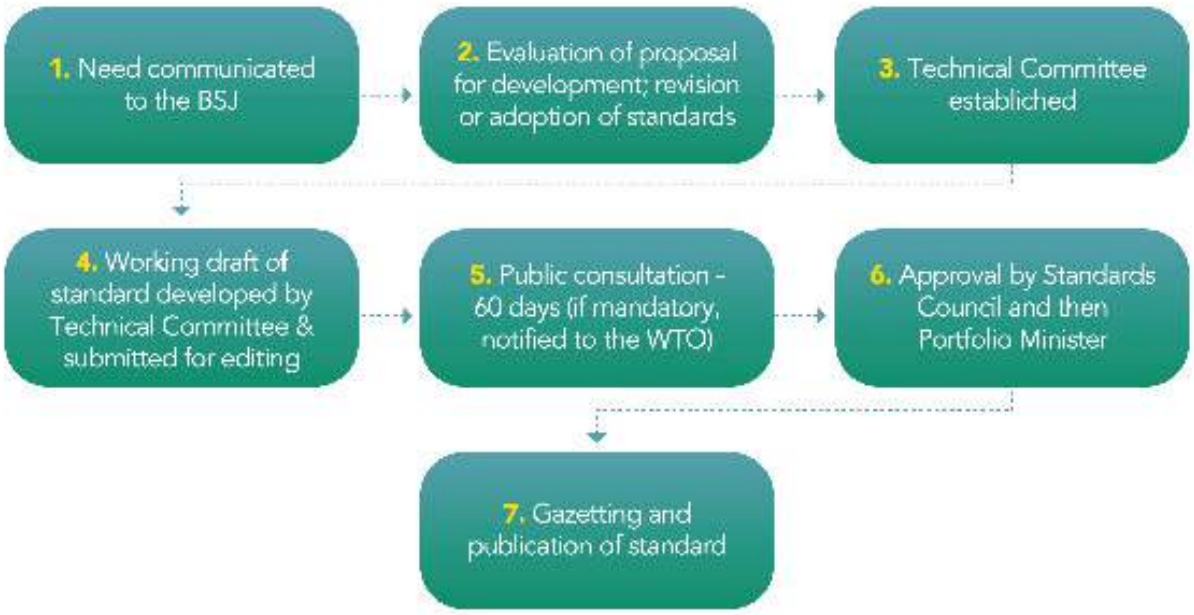
Standards development occurs across the regulatory landscape, some of which is legislated by the Bureau of Standards Act of 1969 and outlined in the National Quality Policy of Jamaica. TPDCo develops standards for licensing, while standards for health and safety, security and environmental management and protection are usually derived from legislation directly or through the power granted to various regulatory authorities to develop standards for certification. For example, standards for food safety are derived from the Public Health Act and associated regulations.

The MSME and Entrepreneurship Policy 2017 focuses on the inclusion of SMTEs in tourism development. This influences standards development, as some of the measures proposed by the policy are helping SMTEs meet local and international standards to improve readiness, removing barriers to participation and increasing international competitiveness.

The BSJ also develops standards for the tourism and hospitality sector. The BSJ identifies and implements minimum standards for tourism entities. This is done through technical committees which are composed of stakeholders such as technical experts, consumers, regulators like TPDCo, and manufacturers.

The BSJ and TPDCo are the chief partners in the development of standards for tourism entities. The partnership ensures that there are no overlapping or conflicting requirements for the development and implementation of standards. The BSJ's standards development process is described below.

Figure 9: BSJ Standards Development Process



Source: Bureau of Standards Jamaica. Standards Development Process. https://www.bsj.org.jm/standards-development-process

Subsector-specific Laws, Policies and Regulations

There are several laws and regulations that apply to the following tourism subsectors:

ACCOMMODATIONS

The Tourist Accommodation (Licence Duties) Act of 1984 requires licensed tourist accommodations to pay a licence duty. The certificate issued when licence duties are paid must be conspicuously displayed and records of payment must be kept and made available for inspection when requested. In addition, the Hotelkeepers' Liability Act of 1950 declares the amount of liability for loss (hence putting a limit on the liability) that hotelkeepers are responsible for and the obligation of hotelkeepers to provide safekeeping for goods/property of guests.

ATTRACTIONS

The Milk River Bath Act of 1927 establishes the Milk River Bath Board and its constitution which regulates the Milk River Bath attraction in the parish of Clarendon. The Bath of St. Thomas the Apostle Act of 1942 establishes the Bath Corporation and its constitution. The act also provides for the management, care, upkeep and preservation of the Bath attraction in the parish of St. Thomas and all the buildings, structures and grounds. The River Rafting Act of 1970, which is soon to be repealed, established the River Rafting Authority which regulates river rafting in Jamaica, develops and promotes the efficient operation of river rafting, and ensures high standards of service to patrons. The Tourist Board (Prescribed Areas) Regulations regulate activities in prescribed areas, including activities related to the operation of attractions.

HERITAGE TOURISM

The Jamaica National Heritage Trust Act of 1985 establishes the Jamaica National Heritage Trust (JNHT) and its constitution which designates and regulates the use of protected monuments and provides for their maintenance. The act also provides the JNHT with the authority to provide licences for use of protected monuments.

ECOTOURISM AND NATURE TOURISM

While there aren't specific policies for ecotourism and/or nature tourism, there are numerous environmental policies and legislation that provide guidance for development ecotourism and nature tourism. There are also some specific policies and legislation that apply to specific aspects of nature such as the Wildlife Protection Act.

COMMUNITY TOURISM

The National Community Tourism Policy of 2015 promotes sustainable tourism while taking into account Jamaica's natural and cultural resources. It encourages the involvement of communities in the development of an authentic and inclusive tourism industry so that Jamaicans can receive greater benefits from the tourism industry. The policy also helps community-level tourism enterprises to meet international standards to increase their competitiveness and improve their viability.

CRUISE TOURISM

The Port Authority Act (1972) and Shipping Act (1999) are important to the legal framework for cruise tourism. They regulate the use of port facilities including berthing and anchorage of vessels and merchant shipping including registration of ships, certification of seafarers and safety of shipping, respectively. Cruise tourism remains an important segment of tourism in Jamaica. Preliminary data from the JTB indicated that cruise passengers accounted for over 1.5 million of the approximately 4.3 million tourists visiting the island in 2019. [47]

SHOPPING

The Duty Free Shopping System Act of 1974 requires a duty-free shop operator's licence for duty-free shops and specifies the conditions under which a licence is granted or renewed, including the furnishing of an appropriate bond. The act also grants the Minister of Tourism the authority to regulate the industry including the goods and consumables that are approved for sale in the duty free shopping system. In addition, the Tourist Shopping Act of 1973 specifies the periods during which trading is permitted in craft markets, curio shops and tourist shops/duty-free shops.

The Tourism Linkages Network was introduced in 2013 to strengthen the linkages between the tourism industry and supporting industries in order to increase the economic impact of tourism through greater use of locally made products. Subsequently the Linkages Network has also focused on experiential tourism through the development of five networks inclusive of shopping. The shopping network aims to establish Jamaica as a destination for shopping. The major initiatives of the shopping network include hosting capacity building workshops for local designers, mapping of the island's shopping assets and the development of an online shipping showcase called STYLE.

SAFETY AND SECURITY

There are several laws and regulations that form the basis for standards in the safety and security sphere for tourism entities. Where the safety of structures is concerned, the Building Act of 2018 and the National Building Code regulate building standards for fire safety, emergencies, environmental soundness and structural considerations. These standards are the basis of requirements such as a Fire Certificate from the Jamaica Fire Brigade and other requirements in the planning process.

The Towns and Communities Act of 1843 regulates the maintenance of good public order in towns and communities, which is important for maintaining a safe environment for visitors. The Local Governance Act (2016) supports "greater scope and autonomy in the management of local affairs with an expanded and more holistic mandate for the good governance, sustainable development and maintenance of good civic order" in municipalities and communities.[48] The Jamaica Constabulary Force Act of 1935 and the Private Security Regulation Authority Act of 1992 govern public and private security respectively. The former specifies the Jamaica Constabulary Force (JCF) as the police body on the island. The JCF also certifies the security plans of tourism entities such as accommodations, which are required for licensing. Further, the JCF participates in TPDCo's anti-harassment activities in resort areas. The Private Security Regulation Authority (PSRA) Act regulates and monitors the operations of contract security organisations, private investigators' organisations and private security guards which are used by several tourism entities to provide a secure environment for customers.

Swimming pools are provided by many tourism enterprises, so their safe operation is important for the quality of the tourism product. The tourism enterprises seeking to operate a public swimming pool must meet regulations specified by the Public Health (Swimming Pool) Regulations of 2000. These regulations specify adequate emergency and standard operating and usage procedures and equipment; the use of trained and licensed lifeguards and other personnel; measures to ensure water quality in respect of water chemistry, water temperature, water clarity; proper maintenance of records; an adequate pumping system; and other necessary maintenance of the swimming pool including the surfaces; decks; changing rooms; toilets; showers; use of safety markings; safe storage and handling of chemicals; and measures for maintaining safety on diving platforms.

Both the Cyber Security Strategy 2015 and Data Protection Act 2017 address the security of information and help to improve the quality of the tourism product, as the safety of information acquired during transactions is important to customers' view of the quality of the tourism product. The Cyber Security Policy addresses weaknesses in information networks that can make them vulnerable to cyber threats and risks. The Data Protection Act provides for the protection of private and personal information during its collection, storage, use and disposal. Robust security in this area will increase confidence in making transactions, contribute to seamless experiences and improve the quality of the service being received.

ENVIRONMENTAL MANAGEMENT AND PROTECTION

Important to the quality of the tourism product is environmental management and protection of the built environment, cultural resources, the natural environment and the ecosystem services they provide. Numerous acts, policies and plans govern this area and include those that manage and support conservation of sensitive resources, areas and species:

- Natural Resources Conservation Authority Act
- Town and Country Planning Act
- Beach Control Act and Regulations
- NRCA (Permits and Licences) Regulations
- Quarries Control Act
- Jamaica National Heritage Trust Act
- Wild lLife Protection Act
- Endangered Species (Protection, Conservation and Regulation of Trade) Act
- Water Resources Act
- Watersheds Protection Act
- Forest Act and Policy
- Orchid Policy
- Beach Policy
- Seagrass Conservation Policy
- National Land Policy
- Water Sector Policy and Action Plan and numerous related standards
- Protected Areas Policy

[47] *Davis, G. (2020, January 13). Over 1.5 Million Cruise Passenger Arrivals In 2019. Jamaica Information Service. https://jis.gov.jm/over-1-5-million-cruise-passenger-arrivals-in-2019/.*

[48] *The Local Governance Act, 2016 No. 8. https://japarliament.gov.jm/attachments/article/341/The%20Local%20Governance%20Act,%202016%20No.%208.pdf.*

- Climate Change Policy Framework (2016) (being updated by the *Ministry of Economic Growth and Job Creation)*
- Beach Access and Management Policy
- National Cays Management Policy
- National Ocean and Coastal Zone Management Policy' (being updated by the Ministry of Foreign Affairs and Foreign Trade)

Quality monitoring programmes and plans include the Biodiversity Strategy and Action Plan and Protected Areas System Master Plan; those governing permit and licensing requirements such as the NRCA Act and Regulations; and those that support planning and protect and establish guiding standards such as the Noise Abatement Act, National Solid Waste Management Act and Regulations, Electricity Act, Building Act and National Building Code, Construction Policy, National Energy Policy and subpolicies, National Policy on Environmental Management Systems (EMS) In Pursuit of a Green Economy, the Green Economy Investment Strategy, Policy on Strategic Environmental Assessment 2003 and supporting plans and programmes.

The Beach Control Act, 1957 is implemented by the Beach Control Authority (Natural Resources Conservation Authority). There are a number of Regulations under the Act which relate directly to destination assurance, including the Beach Control (Safety Measures) Regulations, 2006. The Beach Control Act of 1966 implemented by the Beach Control (Safety Measures) regulates the use of the beach and grants licences for use of the beach as well as the requirements for lifeguard licences.

DISASTER PREPAREDNESS AND MANAGEMENT

Jamaica's Disaster Risk Management Act 2015 is the primary legislation guiding disaster preparedness, response and management in Jamaica. The act refers to sectoral preparedness in general but does not single out tourism as a focal area. The Public Health (Tourism Establishment) Regulations regulate various matters relating to the operation of tourist establishments including the handling of food and food safety, sewerage and drainage systems, storage of hazardous substances and clean water supply and storage of water. It also addresses training of all workers in occupational safety hazards awareness, risk reduction and first-aid procedures.

The National Hazard-Risk Reduction Policy provides a framework for integrating hazard mitigation into all policies, programmes and plans at national and community levels. The National Relief Policy sensitizes the public on the systems in place to access aid after emergencies. The National Disaster Action Plan treats with preparedness, response and recovery and includes mention of evacuation of tourists and prioritizing hotels in search and rescue operations.

NDP – Vision 2030 describes the need for the development and application of multi-hazard mitigation measures for the tourism sector. National Outcome #14 addresses hazard-risk reduction and adaptation to climate change.

The Coastal Management and Beach Erosion Guidelines: Jamaica recognises the implications of coastal flooding and coastal erosion for the tourism sector in Jamaica. The guidelines, developed to complement Vision 2030 Jamaica, provide a tool for coastal managers, developers, and planners. The MOT implements the Climate Change and Multi-Hazard Contingency Programme for the Tourism Sector.

CLIMATE CHANGE MITIGATION AND ADAPTATION

Jamaica's Climate Change Policy Framework seeks to create a sustainable institutional mechanism to facilitate the development, coordination and implementation of policies, sectoral plans, programmes, strategies, and legislation to address the impacts of climate change. The Updated National Determined Contributions June 2020 commits the country as a whole to levels of national reduction of greenhouse gases (GHGs) through decarbonizing energy generation and preservation of forestry. As tourism is energy intensive, it has a de facto commitment for decarbonizing the sector. Jamaica's Third National Communication, a reporting requirement to the UNFCCC on country response to climate change, included adaptation recommendations for tourism areas of Negril and Treasure Beach.

The National Energy Policy and National Renewable Energy policy support the development and deployment of renewable energy sources such as solar, wind, hydropower and biofuels with the target of increasing the percentage of renewables in the energy mix to 20% by 2030 as well as improving energy conservation and efficiency.

The Road Traffic Act and draft National Transport Policy supports control of GHG emissions and importation of high-efficiency vehicles.

The National Water Sector Policy and Implementation Plan explicitly includes climate change adaptation and mitigation and speaks to tourism in the context of sector plans, water harvesting, and Integrated Water Resource Management Council (IWRMC). The NDP – Vision 2030 Tourism Sector Plan 2009–2030 acknowledges the impact of climate change on the sector and the role of proper planning, monitoring and policy mechanisms to ensure sustainability in the tourism industry. There is a Climate Change Focal Point Network, and the Ministry of Tourism has an assigned climate change focal point. Matters of climate change are also addressed in the Ministry's Climate Change and Multi-Hazard Contingency Programme for the Tourism Sector.

MOBILITY AND SEAMLESSNESS

Efficiency in tourism enterprise process flows and those associated with travel to, within and from the country are important in creating a sense of seamlessness, connectivity and above all efficiency in various systems that support tourism. The Passport Act regulates entry of persons into the island. The Civil Aviation, Airports, Airport Authority, Port Authority, Shipping, Customs and Transport Authority Acts are those legal frameworks including various regulations that support movement of persons and goods to, within and from Jamaica via air and/or sea ports and by ground transportation. These provide guidance for movement of persons by air and sea, which is important given Jamaica's significant cruise tourism sector.

Local transport providers in the tourism sector are required to obtain transport authority approved licences. These are augmented by special Team Jamaica training certificates. The Companies Act supports formal registration of tourism enterprises. Formally registered businesses can be supported by various JTB marketing platforms. The Local Governance Act provides a strong local management framework for governance of municipalities and towns, sustainable development and maintenance of good civic order.

LABOUR AND TOURISM WORKFORCE PROTECTION

Labour and workforce protection and development measures are important to the quality of the tourism workforce and the quality of the tourism product. The Labour Relations and Industrial Disputes Act of 1975 regulates industrial relations between employers and employees including disputes.

The Foreign Nationals and Commonwealth Citizens (Employment) Act (1964) prohibits foreign nationals from working in Jamaica without a work permit unless they are exempt and prohibits the improper use of work permits.

The Occupational Safety and Health Bill 2017 was developed to regulates the safety and health of workers in the work environment. In addition, the Human Employment and Resource Training Act of 1982 finances and supports the employment of persons through training. The Tourism Workers Pensions Act of 2019 now provides for a pension scheme for tourism workers which is designed to increase the attractiveness of tourism-related occupations as a career path for Jamaican workers. The Housing Act of 1973 provides a framework for expanding housing for tourism workers. Large resort developments could also be incentivised to provide suitable affordable housing solutions for workers in close proximity.

PROGRAMME SUSTAINABILITY

The Income Tax Relief (Large Scale Projects and Pioneer Industries) Act, the Fiscal Incentives (Miscellaneous Provisions) Act (Omnibus legislation), and the Export Industry Encouragement Act provide income tax relief in relation to projects, fiscal incentives, and concessions in terms of customs duties, all with a view to supporting growth and development of the industry.

The Tourism Enhancement Act supports a tourism enhancement fee to be paid by incoming airline and cruise ship passengers. The resulting TEF is used for development of the tourism product. TPDCo and TEF often directly implement and manage key tourism development projects. Funding support may also be provided to key agencies and tourism enterprises for tourism projects. Revenue streams from TPDCo may also support project implementation.

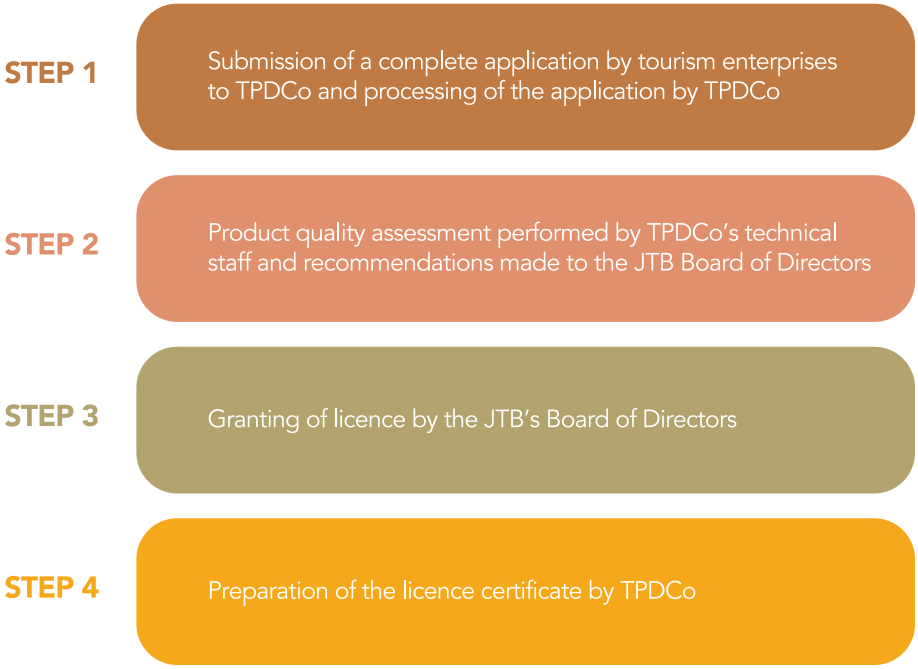
The legislation, regulations, policies, plans and programmes listed are not exhaustive. A detailed list of all such documents were included in the Situational Analysis report presented to the MOT.

C. Overview of the Licensing Process

Four-Step Procedure

The standards for quality of the tourism product are reflected in the JTB licensing requirements. The granting of the Tourist Board licence is a four-step procedure, as seen in Figure 10.

Figure 10: Four-Step Procedure for Tourist Board Licence



This process takes four to eight weeks to complete, primarily because applications for new and renewed licences are processed by TPDCo and subsequently reviewed at the monthly meeting of the Events subcommittee of the JTB Board of Directors. Following that meeting, the applications are discussed and approved at the Board of Directors monthly meeting.

A JTB licence indicates that certain quality and safety standards have been met. TPDCo requires tourism enterprises to demonstrate that they have met statutory requirements such as public liability insurance and business registration and incorporation.

In addition, tourism enterprises are required to prove that they have met health, safety and environmental standards by including, where necessary, various certificates and permits (fire certificates, swimming pool permits, public health certificates, food handling permits, diving certificates, beach licences, lifeguard licences, Private Security Regulation Authority certification for security company/personnel contracted etc.). The required documents are obtained from agencies who manage and regulate other aspects of the quality management system. These agencies—NEPA, local planning agencies, regional health authorities under the remit of the Ministry of Health, JCF, PSRA, and the Maritime Authority—certify that standards that they are mandated to regulate are being met by the applicant. Verification of these documents occurs during the inspection of the premises by TPDCo and during periodic assessments and audits (which are required for access to the certain hospitality incentives programmes).

TPDCo also issues certifications required for licensing—directly or through implementation partners such as Jamaica's Human Capital Development Agency, HEART/NTA—as well as Team Jamaica and Tour Guide certifications. Team Jamaica covers tourism awareness, customer service, attractions, culture (cuisine and music) and environmental awareness, among other things. In addition to the training programmes for Team Jamaica and Tour Guides, TPDCo conducts training programmes for tourism workers for the newly implemented COVID-19 protocols. Visitors under this regime are limited to an identified COVID-19 Resilient Corridor.

It is important to note that the National Destination Assurance Programme is not automated. Jamaica does not have an integrated digital platform for managing and monitoring the licensing and quality assessment process. The quality assessment process is manual and uses paper-based checklists and applications.

Verification Process

The Product Quality Department of the TPDCo conducts quality assurance assessments. After conducting these assessments via inspections, feedback is given if there are deficiencies and timelines are outlined for meeting compliance requirements. The Product Quality department also conducts audits for licensed entities wishing to access incentives under the Hotel and Attraction Incentive Programme. Through these audits, TPDCo provides guidance on good practices and ways to improve current operations in addition to verifying compliance.

TDPCo employs checklists when it inspects tourism enterprises and uses these to determine if there are gaps during the licensing and re-licensing process. TPDCo also does annual assessments which are important for verifying quality, especially for accommodations which have lifetime licences, and performs audits for entities who are developing and upgrading existing operations or seeking access to the Hotel and Attraction Incentive Programme .

Tourism enterprises can also request quality assurance assessments. Each regulatory agency has a similar process. For example, the public health inspector uses an inspection checklist based on the standards in the legislation. In this way, the standards are fragmented as the entity needs to pass all the regulatory agencies' inspections as well as TPDCo's.

Licensing Requirements

The licensing requirements for tourism enterprises in Jamaica encompass the following areas:

1. Business registration and incorporation
2. Statutory requirements such as obtaining a tax registration number, work permits and public liability insurance
3. Communication
4. Staffing
5. Planning and development
6. Public health and sanitation
7. Safety and security
8. Environmental management

BUSINESS REGISTRATION AND INCORPORATION

Business registration and incorporation as well as a certificate of good standing are required from the Companies Office of Jamaica for the following tourism subsectors:

- Accommodations
- Car rentals (contract carriage is exempt)
- Tours
- Attractions including water sports, places of interest
- Travel halts/rest stops
- Travel agencies

These standards ensure that tourism enterprises are operating according to the Companies Act of 2004 and ensure good corporate governance. Areas covered by these standards include appropriateness of the business name, incorporation of articles, the number of directors and the transfer of shares.

TAXPAYER REGISTRATION AND WORK PERMITS

Where statutory requirements are concerned, each tourism enterprise is required to have a Taxpayer Registration Number to meet tax requirements according to the Tax Administration Jamaica Act 2013. This is also required for obtaining loans and for accessing tax and other incentives available to the tourism sector. TPDCo also requires applicants to submit a Tax Compliance Certificate to verify tax compliance.

Tourism enterprises wishing to employ foreign nationals must obtain work permits to ensure that local labour laws are not contravened, to ensure that foreign nationals have the credentials required for the job and that suitably qualified Jamaican nationals are not excluded as mandated by the Foreign Nationals and Commonwealth Citizens (Employment) Act of 1964.

COMMUNICATIONS

Adequate communication is essential to achieving visitor satisfaction. Tourism entities are required to have appropriate signage, brochures (mandated for tours, attractions and places of interest while a list of activities is required for water sports), and other material which clearly explain product offerings, prices, terms and conditions. These are not necessarily mandated by law but TPDCo considers these factors in assessing each entity for licensing. At attractions or accommodations with beaches and swimming pools and for tours, signage is required detailing operating hours, hours of duty for lifeguards, unsafe areas and other safety information and is described in the Public Health Act (Swimming Pool) Regulations and the Beach Control Act of 1966 implemented by the Beach Control (Safety Measures) Regulations 2006.

STAFFING

There are also standards which require adequate staff. Accommodations and other entities operating a public swimming pool or a beach must have adequate numbers of lifeguards according to the Public Health (Swimming Pools) Regulations of 2000. There should be at least one licensed lifeguard for up to 20 users, two for 21 to 50 users, and four for every 51 to 100 users of the pool and deck areas. Class B swimming pools in operation at villas, guest houses, and apartments do not require lifeguards. Tours, motor bikes and car rentals and water sports are all required to have adequate staffing to obtain an operating licence.

PLANNING AND DEVELOPMENT

The laws and regulations governing planning, land use zoning and development are chiefly the Town and Country Planning Act (Law 42 of 1957); Parish Councils' Building Act; Town and Country Planning (Development Orders) and the Local Improvements Act. The entire country is governed by the Town and Country Planning Act with either a confirmed or a provisional development order. All development proposals should conform to the policies and standards contained in these development orders. Tourism entities which are developing properties which change land use, significantly affect the environment, are in prescribed areas, or are regulated by development orders must seek planning approval from local planning authorities. These standards prescribe the appropriate density, use class, access points, height, setbacks, parking, landscaping and drainage for different types of buildings including tourism accommodations, as well as the requirement for an Environmental Impact Assessment (EIA) if the screening process by NEPA has determined the need for an EIA.

PUBLIC HEALTH AND SANITATION

Public Health and Sanitation standards are generally regulated by the Public Health Act of 1998 and associated regulations. All tourism entities which operate food establishments, including accommodations, tours, attractions, places of interest and travel halts/rest stops, are required to meet standards required for a public health certificate as legislated by the Public Health Act of 1998 and the Public Health (Tourism Establishments) Regulations of 2000 which cover safe food handling; adequate medical preparedness; maintenance of clean, safe, potable water; adequate lighting; proper hygiene; and adequate solid waste management and drainage. Workers handling food must have a food handler's permit to certify that they have been trained in the food handling standards and screened for any communicable diseases as mandated by the Public Health (Food Handling) Regulations of 1998.

Tourism entities seeking to operate a public swimming pool must maintain sanitation standards as mandated by the Public Health (Swimming Pool) Regulations of 2000. These regulations specify that there should be an adequate supply of chemicals and testing devices and use of the proper chemicals for sanitization including algicides, bromine, iodine, or chlorine and other measures.

Standards for safety and security, and environmental management are discussed in Section IV, subsection B.

Incentives and Compliance

There is a compelling set of incentives available to licensed tourism enterprises. Licensed entities can access government tax incentives such as the aforementioned Hotel and Attraction Incentive Programme and business development assistance from JAMPRO, TEF and JBDC. There are also marketing benefits associated with being listed on the JTB's website— which is a signal of quality and consistency for visitors.

The success of Jamaica's National Destination Assurance Programme is measured mainly by the level of tourism enterprise compliance with licensing and other regulations. Despite the incentives, TPDCo reports that compliance was at about 43% in 2019, and even lower in prior years.49 There is no definitive data on compliance that could be located for this report.

The cost of the overall licensing process is deemed to be a major barrier for the SMTEs that make up more than 80% of Jamaica's tourism sector. This issue will need further assessment as part of stakeholder consultations.

[49] *Notes from meeting with Dr. Andrew Spencer, former Executive Director of TPDCo. July 20, 2020*

D. Destination Assurance Standards

The purpose of Jamaica's National Destination Assurance Programme is to ensure that visitors have a safe, secure, seamless and authentically Jamaican experience that meets or exceeds international standards from the first point of entry to the last point of exit during their visit.

TPDCo uses two main models for systematizing destination tourism quality.

1. Licensing of Tourism Enterprises: Tourism enterprises go through a licensing process on an annual basis and are assessed periodically to ensure that quality standards are being met. The tourism subsectors included in Jamaica's national quality assurance programme include accommodations (hotels, non-hotels such as villas and cottages and homestays), transportation (motor bike rentals, contract carriage, car rentals), tours, attractions, water sports, places of interest, travel agencies and duty-free shops.

2. Classification of Accommodations: Accommodations are classified according to size and other considerations. In Jamaica, accommodations must have at least ten rooms to be classified as hotels according to the Tourist Board Act. Hotels are then classified as small or large based on the number of rooms. Small hotels have at least ten rooms but not more than 100.[50] Large hotels have at least 101 rooms.

It is important to note that the classification of accommodations in Jamaica is slated to be revised as part of amendments to the Tourist Board Act that are currently under review. The revisions will allow for a more inclusive classification, taking small accommodations with fewer than nine rooms into consideration.

In addition to size, hotels are currently classified according to amenities offered: resorts and non-resorts, boutique (small hotels which are not part of a chain and have a distinct and personalized character), and all-inclusive/non-inclusive.

There are also non-hotels or resort cottages which consist of guest houses, villas, apartments and home stays. A villa is at a minimum a free-standing accommodation available for rent by vacation travellers with 1–10 bedrooms along with other living space such as living rooms, dining rooms, patios or verandas. Generally, villas have a maximum occupancy of two guests per bedroom. Apartments range from studios to three-bedrooms and are sometimes outfitted with fully equipped kitchens and kitchenettes with maid service. Guest houses have at least five bedrooms.[51] Home stays are rooms provided in a private home.

Although classification by star ratings is widely used by larger hotels, there is no independent rating system. Ratings are given by four sources: (a) hotels self-designate the rating (especially international chains), (b) external organisations such as Michelin and Forbes issue ratings based on internal considerations and standards, (c) search engines such as Tripadvisor provide ratings based on the average of peer reviews, and (d) organisations such as Green Globe issue ratings based on their standards.[52]

COVID-19 Protocols & Certification

The COVID-19 global pandemic has brought additional pressure to bear on the sector's goal of destination assurance. Consumer confidence is the new currency. The need to reassure visitors that their experience in Jamaica will be safe in the midst of and after a pandemic requires a new and augmented approach for ensuring visitor health and safety.

COVID-19 is having a devastating economic impact on tourism in Jamaica. The Government of Jamaica has responded by developing and implementing a comprehensive multi-phased approach to reopening the country's borders to visitors by establishing a COVID-19 Resilient Corridor. This has proven to be an effective tool to manage visitor movement within the designated area, thereby minimising the risks associated with spreading the virus.

[50] *Hepburn, M. (2005, May 25). Small properties survival of the fittest. Hospitality Jamaica. http://hospitalityjamaica.com/20050525/news2.html.*
[51] *HVillas in Jamaica. (n.d.). Jamaica Villa Vacation Frequently Asked Questions. http://www.javavillas.org/index.php/about-us/faqs/item/139-what-is-the-difference-between-a-villa-apartment-condo-and-a-guesthouse.*
[52] *Jessop, D. (2016). Star Ratings and the Authentic Caribbean. Jamaica Gleaner. http://jamaica-gleaner.com/article/business/20161225/david-jessop-star-ratings-and-authentic-caribbean.*

New health and sanitation protocols have been implemented. These COVID-19 protocols are being implemented in phases. In the first phase of reopening, tourism travel was limited to the resilient corridor in the north of the island along the coastal areas from Negril to Port Antonio. In the first half of Phase 2, the southern corridor extending from Negril to Milk River in Clarendon is open for tourism travel. The section along the south coast from Milk River to Port Antonio was to be opened in Phase 3. Visitors are restricted to these corridors. Along these corridors, tourism entities have to be cleared by TPDCo before they can be opened to tourists. There are also clear rules for COVID-19 RT-PCR testing that must occur within a specific number of days prior to the intended travel date and be conducted through a medical laboratory approved by the College of American Pathologists.

Key aspects of the protocol include sanitization for workers, guests and surroundings; face masks and personal protective equipment for visitors, guests and surroundings; physical distancing guidelines for workers and guests who have not travelled as a group; clear communications and messaging to sensitize workers and guests to increase and maintain awareness; digital enablement such as reduced cash transactions and expedited check-in/out to reduce exposure; real-time health monitoring and reporting including temperature checks and appropriate escalation of risks; rapid response and training which follow protocols for care when needed.

If an entity wants to achieve TDPCo clearance, it must receive training for its workers which covers what the protocols are, how to apply them, what to do in different situations, and communication and emotional coping strategies, and must pass an assessment to ensure that they are compliant with the protocols. Entities who are compliant receive a certificate from TPDCo which they display on the premises. Additionally, operators must prepare and submit plans for the following areas, which must be approved before they are cleared to operate: emergency plan, physical distancing plan and communications and reporting plan. Ongoing monitoring is performed by TPDCo's product quality officers. All workers at tourism enterprises should have access to an on-site trained COVID-19 Safety Point Person and an on-site or on-call medical professional to handle any suspected cases.

Other measures implemented to manage the COVID-19 crisis include the formation of a COVID-19 Tourism Recovery Task Force whose members are key stakeholders from the public and private sector, and provision of grants for tourism workers and businesses through the COVID Allocation of Resources for Employees (CARE) programme.

Another J$1.2 billion in COVID-19 Tourism Grants has been proposed to support smaller licensed entities in the tourism and related sectors. The Minister of Tourism also announced in July 2020 the establishment of a Tourism Insurance Scheme to, among other functions, support repatriation of tourists who may test positive.

Promoting International Standards

TPDCo has also encouraged the adoption of international standards. These voluntary standards include Hazard Analysis Critical Control Points systems for food handling, Green Globe for accommodations and environmental management, and ISO1400, ISO 9000 and Blue Flag for the operation of beaches. [53]

Some tourism enterprises have sought to obtain certification for these voluntary standards largely as a marketing strategy that appeals to those visitors drawn to these kinds of best practices and strong corporate social responsibility approaches. However, further assessments on the extent to which these voluntary systems are applied in destination areas and mechanisms for monitoring voluntary compliance are recommended.

E. Programme Management

The legislative framework for quality management in Jamaica consists of a collection of standards that are managed and enforced by TPDCo in collaboration with a network of MDAs. While TPDCo has primary control of the quality standards required for tourism enterprises as it implements the directives of the Ministry of Tourism, it shares responsibility for managing and monitoring compliance with specific aspects of the quality assurance system with other MDAs. For example, standards for food handling procedures, workers who handle food, safety conditions for operating a food establishment in the tourism sector and adequate medical preparedness including the containment of communicable diseases are found in the Public Health (Tourism Establishments) Regulations of 2000. Authority to ensure that tourism entities meet these standards is vested in the regional health authorities under the Ministry of Health and Wellness.

[53] *TPDCo. (2015). Product Quality. https://www.tpdco.org/product-quality-training/product-quality/.*

Generally, NEPA manages environmental standards, the regional health authorities manage food safety and public health standards (e.g. swimming pools), the JCF certifies security plans and enforces the law (while the PSRA regulates private security arrangements), and development standards are regulated by the local planning authorities under the directives of the Parish Councils along with Development Orders and the Building Code. Superimposed on this structure is the role of the Bureau of Standards, which specifies standards for all industries including tourism with the aim of reconciling local standards with international standards as stipulated in the National Quality Policy of Jamaica.

In general, TDPCo is mandated to regulate the minimum standards for licensing of tourism enterprises which take quality and safety into account. TDPCo's mission is to develop, diversify and improve the tourism product. It therefore engages governmental and quasi-governmental agencies and coordinates the interests of the public and private sectors.

TPDCo also works through the DACs which maintain some level of responsibility to address destination-level quality management issues, such as cleanliness of destination, safety and security in public areas, disaster risk management, and destination sustainability. Currently their scope of work is quite vague and reactive since it is focused on addressing existing problems arising in that particular local destination. However, it is important to note that currently the DACs are not involved in tourism-enterprise-level quality assurance.

TPDCo's website states that the DACs "ensure the development, improvement and sustainability of the tourism product within the Resort Areas". The establishment of the DACs is evidence of recognition of importance of local destination management and the role that various MDAs play in the shared management and monitoring of Jamaica's tourism product at a local level. There is no one entity that controls it all although TPDCo serves as the central facilitator encouraging cooperation and collaboration among MDAs, the private sector and the non-governmental organisations.

All agencies of the Ministry of Tourism have significant roles to play in facilitating Destination Assurance. These include, but are not limited to, the following:

TPDCo: Develops the tourism product through training, certification, licensing and standards development. Works closely with the DACs in resort areas to respond quickly to quality issues.

Jamaica Tourist Board: Promotes Jamaica locally and internationally as a preferred destination offering experiences built on its unique natural and cultural assets. JTB, through the JTB Act, is charged with the duty of developing the tourist industry of Jamaica and promoting its efficiency.

Jamaica Vacations Limited: Promotes Jamaica and creates the conditions for accelerating the rate of growth of visitor numbers to Jamaica. JamVac will provide, protect and increase the airlift capacity on both schedule and charter routes by working with existing and potential new carriers to create sufficient capacity on each route.

The Devon House Development Company, Milk River Hotel and Spa, Bath Fountain Hotel and Spa and Montego Bay Convention Centre: Provide tourism services under the auspices of the Ministry of Tourism. These agencies seek to provide a tourism product experience that is in alignment with international standards. The entities seek to market their unique offerings such as heritage, restaurants and shopping for authentic Jamaican products, spa services, and sites for international, regional and local conventions. They seek to ensure, with the support of TEF and TPDCo, that the product quality and experience supports destination assurance principles.

Tourism Enhancement Fund: Provides funding and project management support for tourism product development. It supports development of tourism products and services that offer visitors an exceptional and seamless experience, built on Jamaica's unique natural and cultural heritage. TPDCo works closely with TEF in supporting implementation of tourism projects. Funding is also made available to other MDAs and tourism stakeholders through grants or loan facilities to develop the product.

The private sector, represented through tourism industry associations, also plays an important role in quality assurance management in Jamaica. Tourism industry associations not only play an advocacy role but also represent the private sector on the Board of the JTB, DACs, the linkages Council and various task forces and committees. The Jamaica Hotel and Tourist Association (JHTA) is a primary umbrella industry association. It represents Jamaican hotels and other visitor accommodations, as well as most suppliers of goods and services (Allied Members), to the tourism industry, e.g. tourism transportation and craft associations. Their knowledge of the direct issues impacting the sector allows critical concerns to be escalated and addressed at the relevant level.

F. Programme Benefits

Technical advice and business development services also form part of the framework for Destination Assurance. There is opportunity for a more streamlined approach for areas of technical support. TPDCo performs assessments of entities and will provide feedback on how operations can be improved. TPDCo also performs audits as a part of the process of granting access to some government incentives through the Hotel and Attraction Incentive Programme.

There are general business development services offered through Jamaica Promotions Corporation (JAMPRO) which, as an investment focused agency, provides advice on permits, incentives and approvals for all local or international qualified businesses, and Jamaica Business Development Company (JBDC) which has experts to provide technical, design and business advice for SMTEs from concept to market. The extent to which there is special access for tourism entities or whether there is evidence of coordination between these agencies and TPDCo should be evaluated.

Many tourism entities provide internal training for employees but TPDCo requires Team Jamaica training, which it administers, for certain workers including those in the contract carriage and craft traders subsectors. TPDCo also requires and administers training and certification for tour guides. Generally, TPDCo provides training to improve the skills of tourism workers. Courses offered include foreign language skills; villa care, which includes operations of villas, food preparation and housekeeping; and front office procedures which covers telephone and sales techniques as well as guest relations. HEART/NTA is a partner in some of TPDCo's training initiatives.

The Jamaica Centre of Tourism Innovation (JCTI) is a Division of the TEF. The JCTI facilitates the development of Jamaica's valuable human capital and supports innovation for the tourism sector. Through the JCTI, ongoing capacity building that is tailored to specific areas within the tourism sector is possible.

G. Sustainability of Programme

TPDCo's budget is funded primarily from the GOJ and to a lesser extent licensing and training fees. Licensing and training fees are not sufficient to cover the department's expenses. The current budget estimates are not public, but in the 2013–2014 fiscal year the budget for special projects alone was J$616.6 million. The budget requirements for DAFS implementation will largely fall with TPDCo. Hence, TPDCo's operating budget will need to be increased over time.

During the first half of 2020, TPDCo increased the number of product quality officers from 11 to about 70 to ensure adequate enforcement of the COVID-19 protocols. As of 2021, TPDCo has a total of about 210 employees.

While the number of licensed and compliant entities has increased over time and now represent over 70% and 43%, respectively, of the total operators in the industry, there is no other publicly available information on the other trends.

Successful implementation of DAFS will also require that MDAs involved in the licensing component of the programme obtain funding for the recommended systems and priority actions outlined in this document.

5. Visitor Satisfaction

The JTB has been conducting visitor opinion and satisfaction surveys since 1978, and in recent years has published annual reports on the findings. The report provides data and findings from random exit surveys conducted at both Norman Manley and Sangster International Airports throughout the year and compares the findings to previous years. The survey reflects the opinions of stopover visitors and captures several data points:

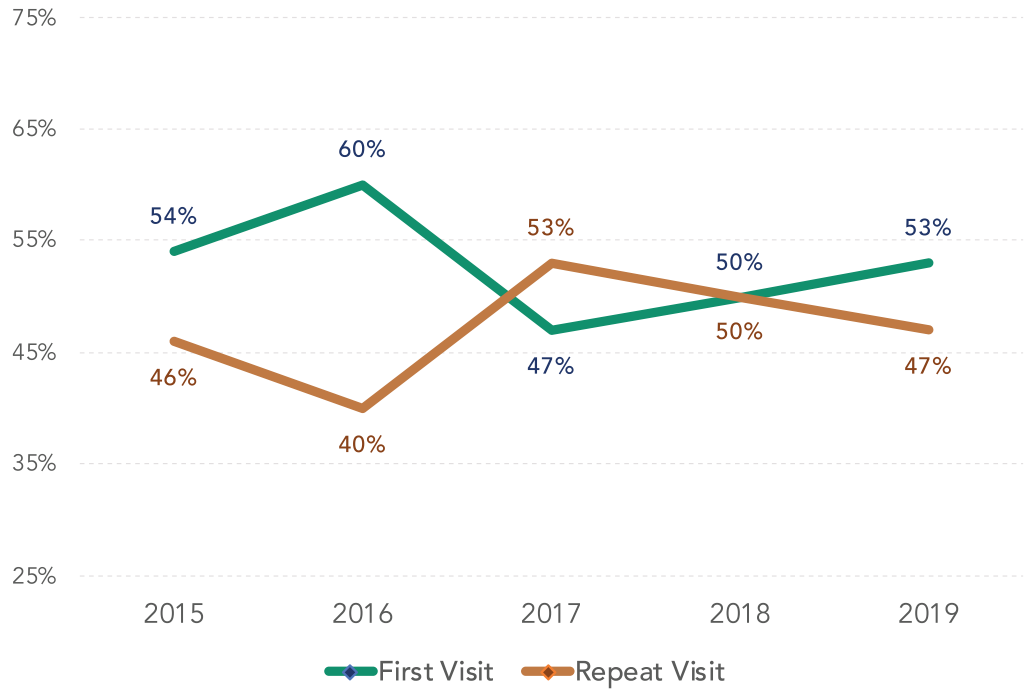
- Overall satisfaction level of visitors
- Details about activities they participated in
- Likelihood of recommending and revisiting
- Visitor demographics
- Purpose of trip

The insights gleaned from the survey enable policy makers to identify and address current and emerging issues related to tourism services, products and experiences. Key results of the 2019 survey related to quality and satisfaction are noted below.

A. Stopover Visitor Travel Patterns and Expectations

In 2019, 53% of stopover visitors to Jamaica were first-time visitors and 47% were repeat visitors, a year-over-year increase of 3% and decrease of 3%, respectively. Figure 11 shows stopover visitation trends from 2015 to 2019. Since 2017, first-time visitors have been increasing while repeat visitors have been decreasing.

Figure 11: First and Repeat Visitors to Jamaica 2015–2019

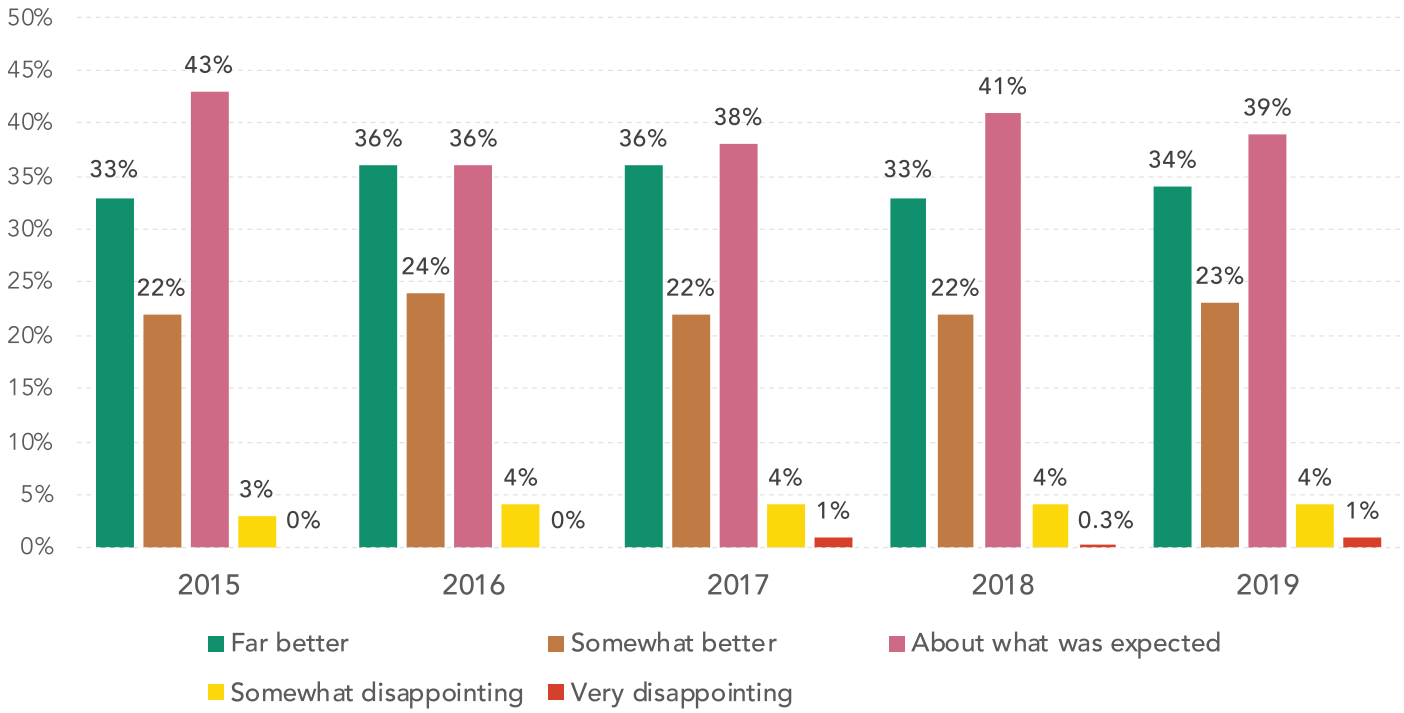


Source: Jamaica Tourist Board

Of 2019's repeat stopover visitors, 56% travel to Jamaica frequently, meaning that their last visit was two years ago or less. This is a year-over-year decrease of 7%, so while more than half of repeat visitors return to Jamaica quite often, this trend has been decreasing in recent years. Fifteen percent (15%) of 2019's repeat stopover visitors had previously visited Jamaica on a cruise, which is an increase of only 2% since 2015.

The JTB survey also measures visitors' expectations compared to their actual experience in Jamaica on a five-point scale from very disappointing to far better than expected. In 2019, 39% of respondents indicated that their experience was about what they had expected. As seen in Figure 12, this has been the most popular response since 2015.

Figure 12: Visit Compared to Expectation 2015–2019

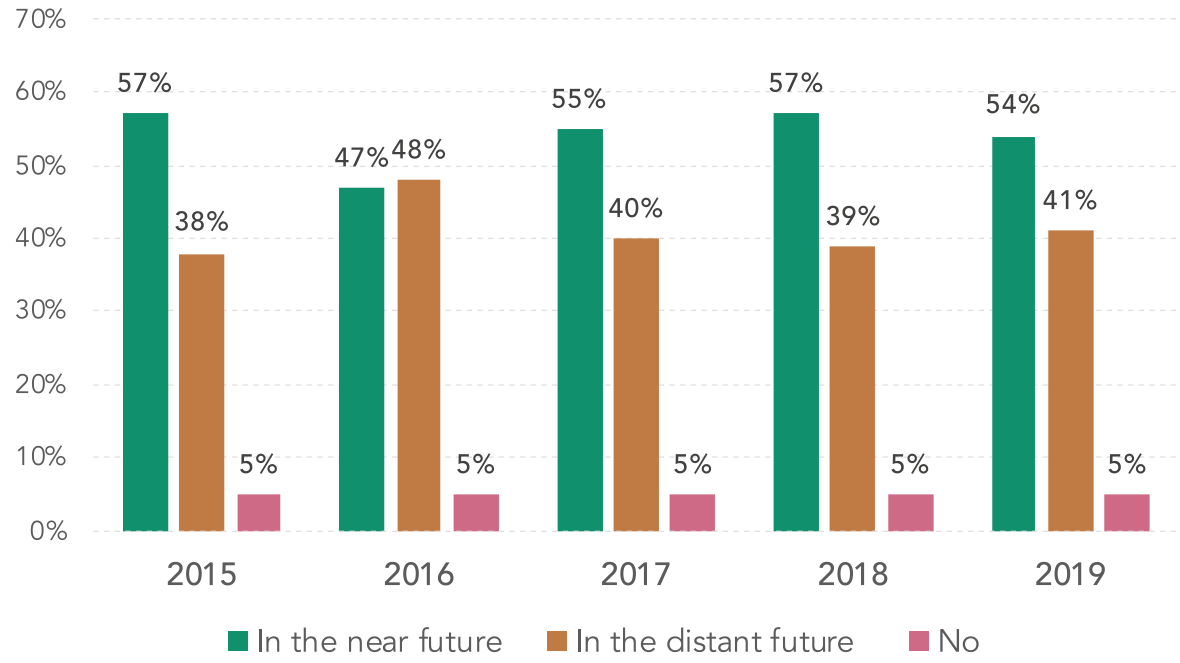


Source: Jamaica Tourist Board

On average over the last five years, 39.4% of respondents had their expectations met, 34.4% had far better experiences than expected, 22.6% had somewhat better experiences than expected, and only about 4.3% of visitors were somewhat or very disappointed. This indicates that most visitors are not disappointed with their experience in Jamaica; for just under half, their expectations are met, and for just over half, their expectations are exceeded. Simply meeting visitor expectations is not necessarily a bad thing as this indicates that the visitor's preconceived expectations were appropriately defined while researching and preparing for their trip (i.e. the destination was accurately marketed). This could also mean that a repeat visitor had a similar experience to a previous trip to Jamaica and already knew what to expect. What is most essential is that the actual visitor experience is a great one, which could mean meeting or exceeding expectations, thus encouraging future revisitation.

Fifty-four percent (54%) of all 2019 respondents intend to visit Jamaica again in the near future and 41% in the distant future. This trend has remained relatively consistent over the past three years as seen in Figure 13. Only a small portion stated they would never visit again, a trend that has remained low, around 5%, in recent years.

Figure 13: Intention to Visit Jamaica Again 2015–2019



Source: Jamaica Tourist Board

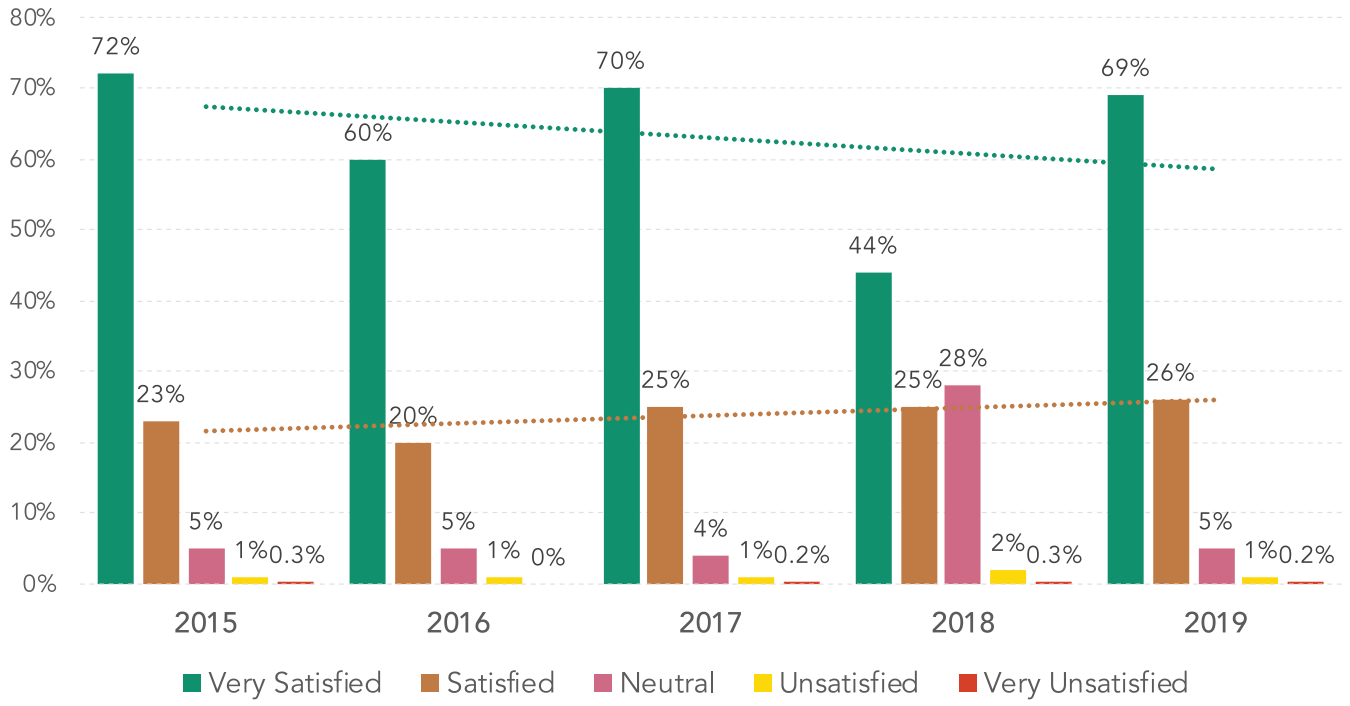
Ninety-six percent (96%) of survey respondents would recommend Jamaica to friends and family and only 3% would not in 2019, a trend that has remained consistent since 2015. More than 75% of survey respondents would definitely recommend the destination to friends and family—a trend with very little variance over the last five years.



B. Stopover Visitor Satisfaction

The majority of respondents (69%) were very satisfied and 26% were satisfied with their time in Jamaica in 2019. While this trend has fluctuated in recent years as illustrated in Figure 13, the majority of respondents have indicated that they were very satisfied with their overall experience. JTB creates a Satisfaction Index based on this data, which has remained around 4.65 out of 5 over the past five years.

Figure 14: Level of Satisfaction with Jamaica 2015–2019



Source: Jamaica Tourist Board

Table 9: Satisfaction with Jamaica Year-Over-Year Variance 2015–2019

	2015-2016	2016-2017	2017-2018	2018-2019
Very Satisfied	-16.67%	+16.67%	-37.14%	+56.82%
Satisfied	-13.04	+25.00%	No change	+4.00%

Source: Jamaica Tourism Board

Table 9 shows the notable fluctuation year-over-year in the percentage of respondents who indicated they were satisfied or very satisfied with their experience in Jamaica. While visitor satisfaction has slowly increased over the past five years, the percentage of respondents indicating that they were very satisfied with their time in Jamaica is definitely decreasing. Satisfaction ratings were particularly low in 2017-2018. Since 2015, the percentage of respondents indicating they were neither satisfied nor dissatisfied with their experience in Jamaica has remained around 5%, except in 2017-2018 when that number significantly increased to 28%. This corresponded with a 26% year-over-year decrease in very satisfied respondents in 2017-2018. In 2018-2019, satisfaction scores appear to have bounced back to be in line with recent trends.

The JTB Visitor Opinion Survey also collects qualitative data on satisfaction. The following is a list of reasons why those that were not satisfied with their experience would not revisit Jamaica:

- They visited before
- Better experience elsewhere
- Other places to visit
- Unclean
- Immigration officers
- Exchange rate
- Harassment
- Expectation
- Safety
- Not interested
- Expensive
- Infrastructure (roads)
- Distance
- Homophobia

Many of these reasons, especially "better experience elsewhere", "unclean", "harassment", "safety", "expensive" and "infrastructure (roads)", not only impact visitor satisfaction but also the overall quality of tourism offerings and the destination as a whole. Since quality relates to the total experience that a visitor has in Jamaica, just one bad experience can significantly impact visitor perception and the reputation of a destination and deter future visitation.

The JTB Visitor Opinion Survey also rates satisfaction against 15 attributes that define the quality of the destination. Satisfaction with these attributes are rated on a five-point scale with 1 as not at all satisfied and 5 as very satisfied. Table 10 ranks the quality of the 15 attributes based on their 2019 index score, which reflects the average satisfaction rating for the attribute that year. The 2015 index scores serve as baseline for this analysis. An index score highlighted green indicates a year-over-year increase, while red indicates a year-over-year decrease. If there was no change in index score year-over-year, then the score is highlighted grey. While the majority of the attribute's satisfaction index scores decreased year-over-year in 2016 and 2018, most improved year-over-year in 2019.

Table 10: Stopover Visitor Satisfaction with Attributes That Define Destination Quality, 2015–2019

ATTRIBUTE	2015 INDEX	2016 INDEX	2017 INDEX	2018 INDEX	2019 INDEX
1. Scenery	4.68	4.68	4.69	4.62	4.69
2. Cleanliness	4.01	4.10	4.05	3.92	4.65
3. Beaches	4.63	4.56	4.48	4.59	4.60
4. Culture	4.57	4.56	4.64	4.58	4.59
5. Music	4.48	4.43	4.48	4.50	4.50
6. Accommodation Facilities	4.54	4.52	4.41	4.49	4.47
7. Attitude of People	4.49	4.58	4.48	4.37	4.45
8. Entertainment	4.39	4.31	4.40	4.31	4.34
9. Places to Eat and Drink	4.40	4.33	4.41	4.30	4.32
10. Attractions	4.32	4.32	4.37	4.29	4.31
11. Safe place to visit	4.20	4.23	4.23	4.07	4.19
12. Water Sports Activities	4.20	4.18	4.17	4.09	4.19
13. Ease of Finding Your Way Around	4.03	4.09	4.17	4.04	4.05
14. Tourist Information and Other Visitor Type Centres	4.05	4.09	4.06	3.95	4.05
15. Shops (Gifts, Foods, Books, etc.)	3.34	4.02	4.10	4.00	4.01

Source: Jamaica Tourism Board

All attributes received scores above 4 in 2019, indicating that on average, visitors were at least somewhat satisfied with the quality of the destination. Scenery, cleanliness, culture and beaches had the highest satisfaction ratings, all scoring above 4.5. While scenery, culture and beaches have remained consistently high in the satisfaction index score ranking since 2015, 2019 marks a significantly large improvement for cleanliness, which had in previous years scored among the lowest of the attributes.

Shops, tourism information/visitor centres, and ease of finding your way around had the lowest satisfaction ratings in 2019, all scoring below 4.1. These attributes have remained consistently low in the satisfaction index score ranking over the last five years. While most attribute satisfaction scores have improved in 2019 compared to 2015, the following attributes saw an overall decline in satisfaction scores: beaches, accommodation facilities, attitude of people, and water sports activities.

A number of comments submitted by survey respondents discussed dissatisfaction with accommodations, especially in terms of customer service. Another commonly expressed concern was the overpricing of attractions. Recommendations to address these two areas, along with other lower-scoring attributes, will be included in the DAFS.

C. Cruise Passenger Satisfaction

The annual JTB Visitor Opinion Survey only measures satisfaction levels of stopover visitors, not cruise passengers, which comprise a significant portion of visitors to Jamaica. Currently the Port Authority of Jamaica (PAJ) does not have a formal mechanism for monitoring quality and visitor satisfaction. PAJ does receive satisfaction data from the individual cruise lines on a regular basis in hard copy form that can be distributed. JAMVAC has also implemented push button feedback devices at ports of entry that ask visitors to select how their Jamaican experience was on a scale from green to red. While these devices allow for the real-time collection of satisfaction data, they do not provide any details into why someone had a great or bad experience, and may produce inaccurate data if someone pushes the device more than once. No visitor satisfaction data collected by either PAJ or JAMVAC is publicly accessible online.

Business Research & Economic Advisors (BREA) prepares a report approximately every three years for the Florida-Caribbean Cruise Association (FCCA) called the *Economic Contribution of Cruise Tourism to Destination Economies*, which analyses the impacts of passenger, crew, and cruise line spending in the Caribbean. In addition to collecting economic data, the study also includes results of transit passenger surveys which measure passengers' satisfaction with their visit to their destination for a number of categories. A 10-point scale is used, with 10 being the highest (extremely satisfied) and 1 being the lowest (not at all satisfied). The report includes data from cruise passenger visit satisfaction surveys across 36 Greater Caribbean destinations, all of which are conducted using the same methodology. Therefore the report provides a credible source of comparable visitor satisfaction data across cruise destinations in the Caribbean.

Table 11 shows cruise passenger visit satisfaction scores for Jamaica from the three most recent BREA surveys, which were calculated over an eight-month period from October through May. Jamaica was not included in the 2011–2012 report. For the most recent data available (the 2017–2018 season), just over half of the survey respondents noted that this was their first visit to Jamaica, which was in line with statistics that the JTB collected for stopover visitors around the same time frame. Ninety-three percent (93%) of survey respondents disembarked the ship and on average spent 4.2 hours ashore. The parameters were expanded starting in the 2018 report to provide more insights, including six new categories which are marked as "N/A" for previous years. A mean score highlighted green signifies an increase since the prior BREA report, while red indicates a decrease. If there was no change, the score is highlighted grey.

Table 11: Cruise Passenger Visit Satisfaction Mean Scores 2008–2018

CATEGORY	2008-2009 Mean Score*	2014-2015 Mean Score*	2017-2018 Mean Score*
Overall Visit	6.8	6.9	7.1
Visit Met Experience	6.4	6.3	6.5
Likelihood of a Return Visit	4.2	4.4	4.3
Likelihood of Recommending	N/A	5.9	5.0
Initial Shoreside Welcome	7.0	7.1	7.1
Guided Tour	8.1	8.0	8.4
Knowledge of Guide	N/A	N/A	8.8
Professionalism of Guide	N/A	N/A	8.7
Value of Tour	N/A	N/A	8.0
Historic Sites/Museums	7.0	6.7	7.3
Variety of Things to See and Do	6.5	6.6	6.6
Friendliness of Residents	6.9	7.5	7.6
Overall Shopping Experience	5.9	6.7	6.8
Courtesy of Employees	7.3	7.7	7.6
Variety of Shops	6.1	6.7	6.6
Quality of Goods	N/A	N/A	6.8
Overall Prices	6.0	6.3	6.4
Taxis/Local Transportation	6.9	6.6	7.7
Professionalism of Driver	N/A	N/A	8.3
Cleanliness of Transport	N/A	N/A	8.3

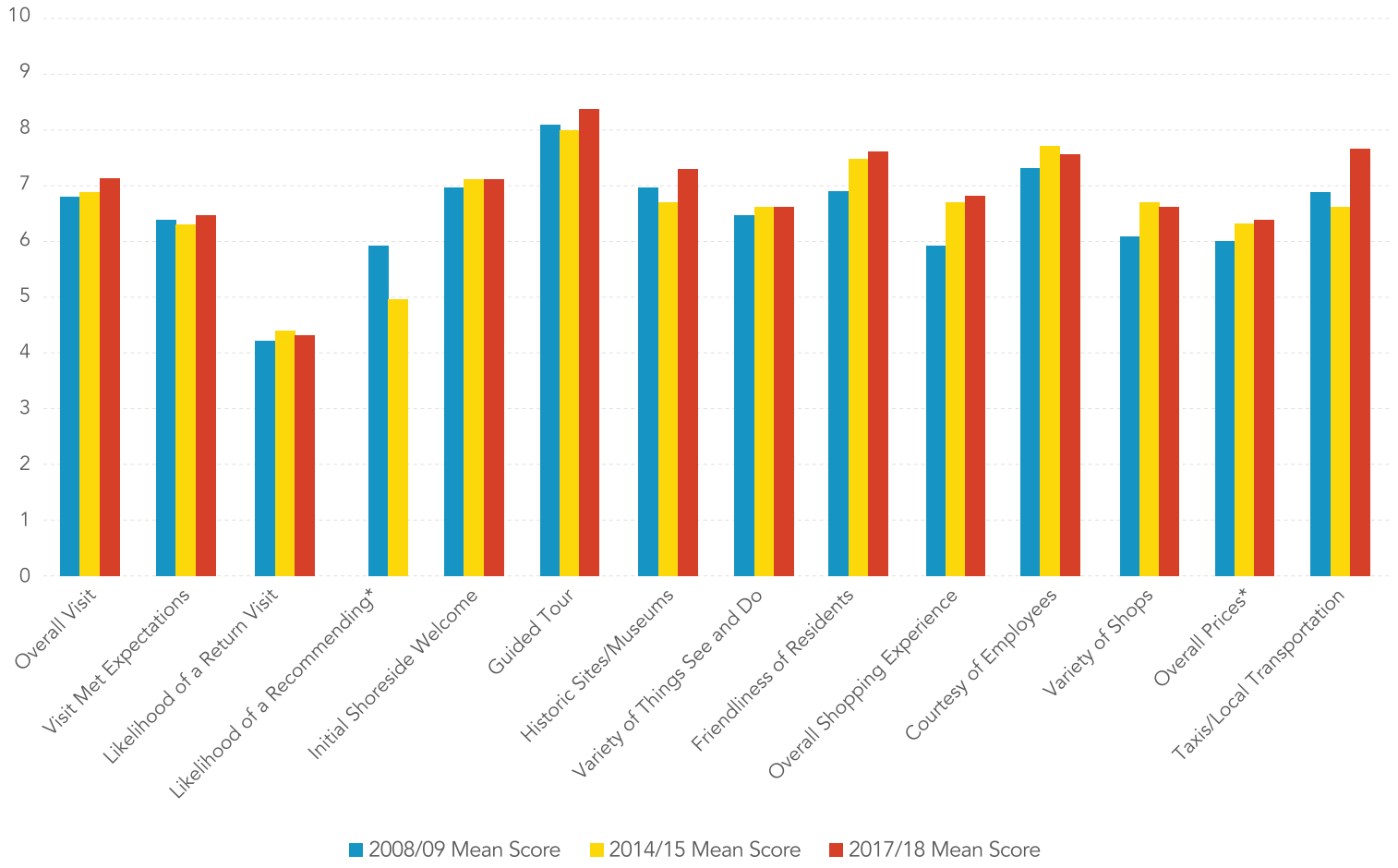
Source: BREA

**Scale is 1 to 10 with 10 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied/Likely: 10–9; Very Satisfied/Likely: 8–7; Somewhat Satisfied/Likely: 6–5; Not Too Satisfied/Likely: 4–3; Not At All Satisfied/Likely: 2–1.*

In 2018, the highest scoring cruise passenger satisfaction category was Guided Tour (8.4) and its three subcategories: Knowledge of Guide (8.8), Professionalism of Guide (8.7), and Value of Tour (8.0). Taxis/Local Transportation (7.7) and its two subcategories—Professionalism of Driver and Cleanliness of Transport (both 8.3)—also scored highly. In general, categories involving visitors' interactions with locals scored the highest—for example, Courtesy of Employees and Friendliness of Residents (both 7.6). The lowest scoring categories were Likelihood of a Return Visit (4.3) and Likelihood of Recommending (5.0), indicating that cruise visitors are not too likely to revisit or recommend to others. Both are indications that the experience and the quality of the destination did not impress cruise passengers enough to want to return. These two categories score the lowest across all cruise destinations in the Caribbean that are included in the BREA reports.

However, cruise passengers were generally very satisfied with their visit to Jamaica, and this Overall Visit score, along with most of the cruise passenger satisfaction categories, has improved over the last decade.

Figure 15: Cruise Passenger Visit Satisfaction Mean Scores 2008–2018



**The Likelihood of Recommending category was not included in the 2008–2009 report.*

D. Benchmarking Cruise Visitor Satisfaction

Since the BREA reports include data from cruise passenger visit satisfaction surveys across 36 Greater Caribbean destinations which are all conducted using the same methodology, Jamaica's scores can be directly compared to its competition as well as the average for the region.

Table 12 shows how Jamaica's cruise passenger visit satisfaction compares to the rest of the Caribbean and a select set of competitor destinations. A score highlighted green indicates that the destination's mean score for that category was higher than the average for all 36 destinations, while a score highlighted red indicates that the destination scored lower. If the destination mean score for the category was the same as the average across all 36 destinations, then the score is highlighted grey.

Table 12: Comparison of Cruise Passenger Satisfaction with Caribbean Destination Visits, 2018

CATEGORIES	AVERAGE FOR ALL DESTINATIONS	JAMAICA	BAHAMAS	DOMINICAN REPUBLIC	PUERTO RICO	BARBA-DOS	ARUBA
Overall Visit	7.74	7.09	7.54	7.59	7.59	8.20	8.39
Visit Met Experience	7.11	6.52	6.89	6.95	7.00	7.60	7.82
Likelihood of a Return Visit	4.59	4.34	5.37	5.33	5.04	5.22	5.74
Likelihood of Recommending	5.41	4.95	5.94	5.81	5.56	6.17	6.74
Initial Shoreside Welcome	7.85	7.12	7.23	8.11	7.67	7.48	7.90
Guided Tour	8.47	8.43	8.28	8.19	8.63	8.79	8.74
Knowledge of Guide	8.85	8.78	8.59	8.43	9.09	9.12	8.99
Professionalism of Guide	8.81	8.72	8.57	8.46	9.04	9.10	8.91
Value of Tour	8.02	7.97	7.92	7.62	8.29	8.47	8.42
Historic Sites/Museums	7.71	7.27	7.58	7.21	8.41	8.12	7.86
Variety of Things to See and Do	7.08	6.62	7.03	6.87	7.15	7.44	7.76
Friendliness of Residents	8.12	7.62	7.70	8.05	8.16	8.45	8.46
Overall Shopping Experience	7.40	6.81	7.45	7.41	7.46	7.36	8.14
Courtesy of Employees	8.13	7.61	7.92	8.18	8.22	8.07	8.50
Variety of Shops	7.10	6.57	7.33	6.98	7.12	7.23	7.99
Quality of Goods	7.43	6.79	7.37	7.38	7.48	7.37	8.06
Overall Prices	7.16	6.44	6.98	7.10	7.50	6.77	7.59
Taxis/Local Transportation	8.08	7.70	7.83	8.12	8.08	8.31	8.47
Professionalism of Driver	8.53	8.30	8.15	8.37	8.41	8.67	8.74
Cleanliness of Transport	8.43	8.26	7.72	8.52	8.47	8.54	8.80

Source: BREA

**All Destinations includes 36 Greater Caribbean destinations.*

The table clearly shows that Jamaica scores below average for all categories of cruise passenger satisfaction compared to the rest of the Caribbean region in 2018. Jamaica ranks 31 out of 36 for Overall Visit, with a mean score 0.64 points below the average of all 36 destinations included in the BREA report. Its highest ranking is for Likelihood of Return (22 of 36) and lowest is for Initial Shoreside Welcome (36 of 36). Jamaica ranks in the 40th percentile across all categories when compared to all other destinations.

When compared to the other five competitor destinations (Bahamas, Dominican Republic, Puerto Rico, Barbados, and Aruba), Jamaica ranks last for 13 of the 20 categories including Overall Visit; fifth for Historic Sites/Museums, Professionalism of Driver and Cleanliness of Transport; and fourth for Guided Tour and each of its four subcategories. A comparison of overall rankings for Jamaica and these five competitor destinations from 2008–2018 is included in Table 13.

Table 13: Comparison of Rankings for Cruise Passenger Satisfaction with Caribbean Destination Visits, 2008–2018

SATISFACTION RANKING (OUT OF ALL DESTINATIONS*)							
CATEGORIES	YEAR	JAMAICA	BAHAMAS	DOMINICAN REPUBLIC	PUERTO RICO	BARBADOS	ARUBA
Overall Visit	2008-2009	23	6	29	22	20	14
	2014-2015	32 ▼	15 ▼	35 —	12 ▲	16 ▲	6 ▲
	2017-2018	31 ▼	24 ▼	20 ▲	21 ▼	7 ▲	4 ▲
Visit Met Expectations	2008-2009	22	8	29	23	19	16
	2014-2015	33 ▼	12 ▼	35 —	13 ▲	15 ▲	6 ▲
	2017-2018	28 ▲	24 ▼	23 ▲	21 ▼	8 ▲	3 ▲
Likelihood of a Return Visit	2008-2009	14	2	27	18	13	16
	2014-2015	23 ▼	1 ▲	28 ▲	7 ▲	17 ▼	10 ▲
	2017-2018	22 ▲	8 ▼	10 ▲	14 ▼	12 ▲	4 ▲
Likelihood of Recommending	2008-2009	N/A	N/A	N/A	N/A	N/A	N/A
	2014-2015	23	3	32	6	18	4
	2017-2018	21 ▲	12 ▼	14 ▲	18 ▼	7 ▲	2 ▲
Initial Shoreside Welcome	2008-2009	26	6	29	27	24	25
	2014-2015	33 ▼	19 ▼	31 ▲	22 ▲	20 ▲	14 ▲
	2017-2018	36 ▼	33 ▼	11 ▲	23 ▼	29 ▼	15 ▼
Guided Tour	2008-2009	14	12	29	25	10	19
	2014-2015	28 ▼	7 ▲	33 ▲	18 ▲	24 ▼	2 ▲
	2017-2018	23 ▲	27 ▼	28 ▲	18	6 ▲	10 ▼
Historic Sites/Museums	2008-2009	17	6	29	3	8	19
	2014-2015	28 ▼	16 ▼	35 —	1 ▲	6 ▲	12 ▲
	2017-2018	26 ▲	24 ▼	28 ▲	2 ▼	5 ▲	13 ▼

SATISFACTION RANKING (OUT OF ALL DESTINATIONS*)							
CATEGORIES	YEAR	JAMAICA	BAHAMAS	DOMINICAN REPUBLIC	PUERTO RICO	BARBADOS	ARUBA
Variety of Things to See and Do	2008-2009	19	4	29	22	9	12
	2014-2015	25 ▼	19 ▼	35 —	3 ▲	11 —	5 ▲
	2017-2018	26 ▼	19 —	21 ▲	14 ▼	11 —	3 ▲
Friendliness of Residents	2008-2009	28	10	29	26	18	7
	2014-2015	32 ▲	17 ▼	35 —	21 ▲	15 ▲	9 ▼
	2017-2018	28 ▲	26 ▼	22 ▲	18 ▲	11 ▲	9 —
Visit Met Expectations	2008-2009	22	8	29	23	19	16
	2014-2015	33 ▼	12 ▼	35 —	13 ▲	15 ▲	6 ▲
	2017-2018	28 ▲	24 ▼	23 ▲	21 ▼	8 ▲	3 ▲
Likelihood of a Return Visit	2008-2009	14	2	27	18	13	16
	2014-2015	23 ▼	1 ▲	28 ▲	7 ▲	17 ▼	10 ▲
Overall Shopping Experience	2008-2009	23	5	29	14	20	11
	2014-2015	24 ▲	15 ▼	35 —	14 ▲	18 ▲	5 ▲
	2017-2018	26 ▼	16 ▼	17 ▲	15 ▼	21 ▼	2 ▲
Courtesy of Employees	2008-2009	27	8	29	20	24	13
	2014-2015	29 ▲	18 ▼	35 —	21 ▲	25 ▲	2 ▲
	2017-2018	33 ▼	27 ▼	18 ▲	17 ▲	20 ▲	1 ▲
Variety of Shops	2008-2009	19	4	29	13	15	9
	2014-2015	20▲	17 ▼	35 —	7▲	16▲	4▲
	2017-2018	27 ▼	11 ▲	21 ▲	15 ▼	13 ▲	3 ▲
Overall Prices	2008-2009	25	11	29	13	24	14
	2014-2015	30▲	14▼	35 —	8▲	21▲	5▲
	2017-2018	30 —	22 ▼	21 ▲	8 —	26 ▼	6 ▼
Taxis/Local Transportation	2008-2009	23	6	29	21	20	13
	2014-2015	33 ▼	14 ▼	32 ▲	5 ▲	10 ▲	7 ▲
	2017-2018	29 ▲	26 ▼	16 ▲	19 ▼	9 ▲	6 ▲

Source: BREA

**All Destinations includes 29 Greater Caribbean destinations in 2008, 35 in 2015, and 36 in 2018*

While Jamaica's cruise passenger visit satisfaction scores have generally improved over the last decade, they are behind most of the region. There is room for much improvement to remain a competitive, high-quality destination within the region.

E. Safety and Security

Safety and security play a significant role in the perception of the reputation of a destination and have a direct impact on visitor experience. WEF's TTCI published in 2019 flagged Safety and Security as an area for improvement. Jamaica was ranked 131 of 140 countries on Safety and Security. This notably low ranking is attributed to poor rankings for homicide rate (137 of 140), business costs of crime and violence (135), and reliability of police services (103). [54]

Jamaica has been the subject of travel advisories from different countries periodically. The U.S. Department of State, in August 2020, issued a Level 3 Travel Advisory for Jamaica. In addition to reconsidering travel due to COVID-19-related health and safety concerns, the Department of State also warned US travelers to "exercise increased caution in Jamaica due to crime", especially in some areas of Kingston, Montego Bay and Spanish Town where "violence and shootings occur regularly".[55] The travel advisory included the following country summary: "Violent crimes, such as home invasions, armed robberies, sexual assaults, and homicides are common. Sexual assaults occur frequently, including at all-inclusive resorts. Local police lack the resources to respond effectively to serious criminal incidents. Emergency services vary throughout the island, and response times may vary from U.S. standards".[56]

The Ministry of Tourism recognises the growing public concerns regarding visitor safety and security and is responding to these issues strategically through improved planning, new protocols and special campaigns. Here are a few notable initiatives.

- In the 2017–2018 tourism sectoral budget presentation, the Minister of Tourism, Hon. Edmund Bartlett, highlighted investments of over J$2 billion over four years to support the security forces and to strengthen partnerships between the JCF, TPDCo and TEF to boost safety and security in all the island's resort areas.[57] The TEF funding would be allocated to the acquisition of vehicles; rehabilitation of police stations and other buildings; acquisition of equipment to upgrade marine resources; and the commissioning of closed-circuit television systems. Furthermore, a new District Constables Training Programme, also funded by TEF, would provide training, uniforms, salaries and other resources for some 100 constables who are currently deployed in resort areas. These initiatives were aimed at strengthening the formal security arrangements in resort communities and help to tackle the issue of visitor harassment.

- In the 2019–2020 tourism sectoral budget presentation, Minister Bartlett announced the commissioning of a comprehensive evaluation of visitor safety and security and the progress that TPDCo was making on an islandwide tourism security audit of about 300 hotels and guesthouses as well as tourism attractions that would help to inform the development of new safety and security protocols.58 Unfortunately, this literature review does not incorporate the main findings from the audit and protocols report since it was not provided to the DAFS consulting team.

- TPDCo has also invested heavily in tackling harassment of tourists, especially in and around cruise destinations. One initiative TPDCo has implemented to combat this is the introduction of a social intervention programme to reform harassers and include them in the official operations at ports. About 10–20 individuals were trained and integrated into the formal system as paid "Ask Me" guides at the Falmouth port in 2018. While the programme has not eradicated all harassment in the area, it has been noticeably successfully in reducing harassment levels. TPDCo is also currently working on an instrument to measure harassment levels around the areas where visitors disembark cruise ships. TPDCo has prioritized collecting and measuring qualitative and quantitative data on harassment levels as well as hotspot mapping in its current National Destination Assurance Programme.

Safety and security considerations were, therefore, and still remain, among the primary areas of improvement for Destination Assurance. It is important to distinguish between incidents of visitor harassment and crimes committed against visitors. According to TPDCo: "Harassment occurs from the perspective of the person being harassed. If by your actions the visitor feels pestered or irritated then it does not matter that you are trying to make a sale, or interest them in something. Other ways of describing harassment include being a nuisance, annoyance, aggravation, provocation or bother".[59] Harassment is therefore based on perception, whereas crime is the commission of an offence or illegal activity. Both significantly impact visitor arrivals, experience, and satisfaction and must be minimised to protect the reputation of the destination.

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[54] *World Economic Forum (WEF). (2019). Jamaica Travel & Tourism Competitiveness Index 2019 edition. http://reports.weforum.org/travel-and-tourism-competitiveness-report-2019/country-profiles/#economy=JAM.*

[55] *U.S. Department of State, Bureau of Consular Affairs. (2020). Jamaica Travel Advisory. https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories/jamaica-travel-advisory.html.*

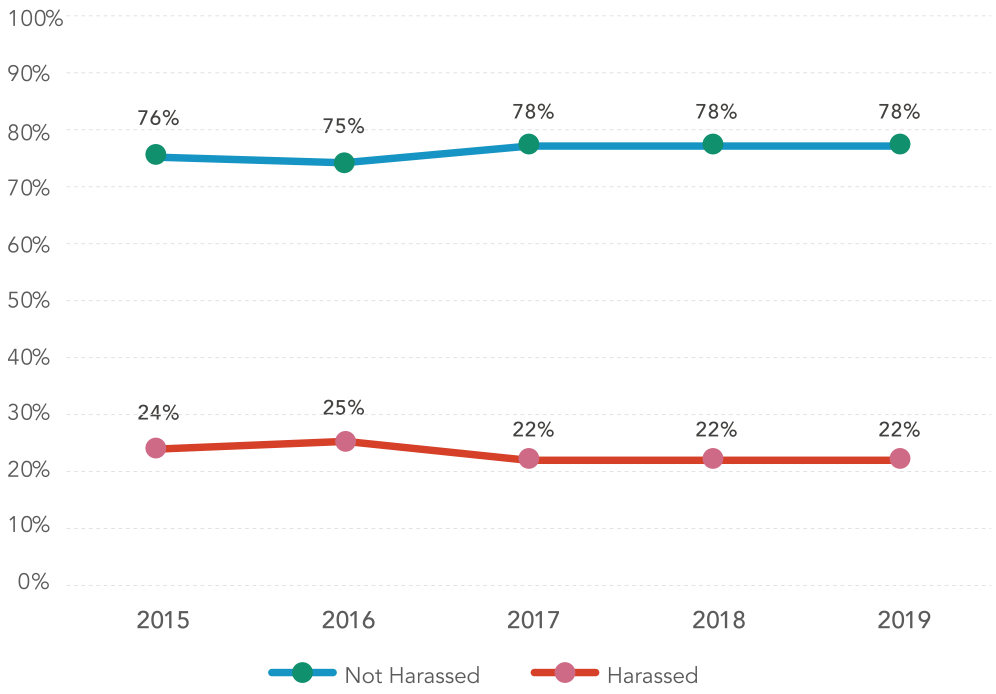
[56] *Ibid.*

[57] *Ministry of Tourism Sectoral Presentation (2017/2018). Sustainable Tourism: A Catalyst for Job Creation and Inclusive Growth. https://www.tpdco.org/sectoral-debate-presentation-20172018/*

[58] *Ministry of Tourism Sectoral Presentation (2019/2020). Reimagining Tourism for Inclusive Growth and Prosperity. http://online.fliphtml5.com/bzweq/wqmx/#p=32.*

Based on the JTB visitor exit surveys, while not the lowest ranked of the 15 attributes, "safe place to visit" has consistently ranked in the bottom third of all attributes since 2015. The majority (78%) of those surveyed in 2019 reported no harassment during their stay in Jamaica, while 22% did experience some form of harassment. This means that about 1 in every 5 respondents were harassed while visiting Jamaica in 2019, and in years prior the ratio was closer to 1 out of every 4. These statistics have slightly improved since 2015, as shown in Figure 16.

Figure 16: Incidence of Visitors Experiencing Harassment in Jamaica 2015–2019

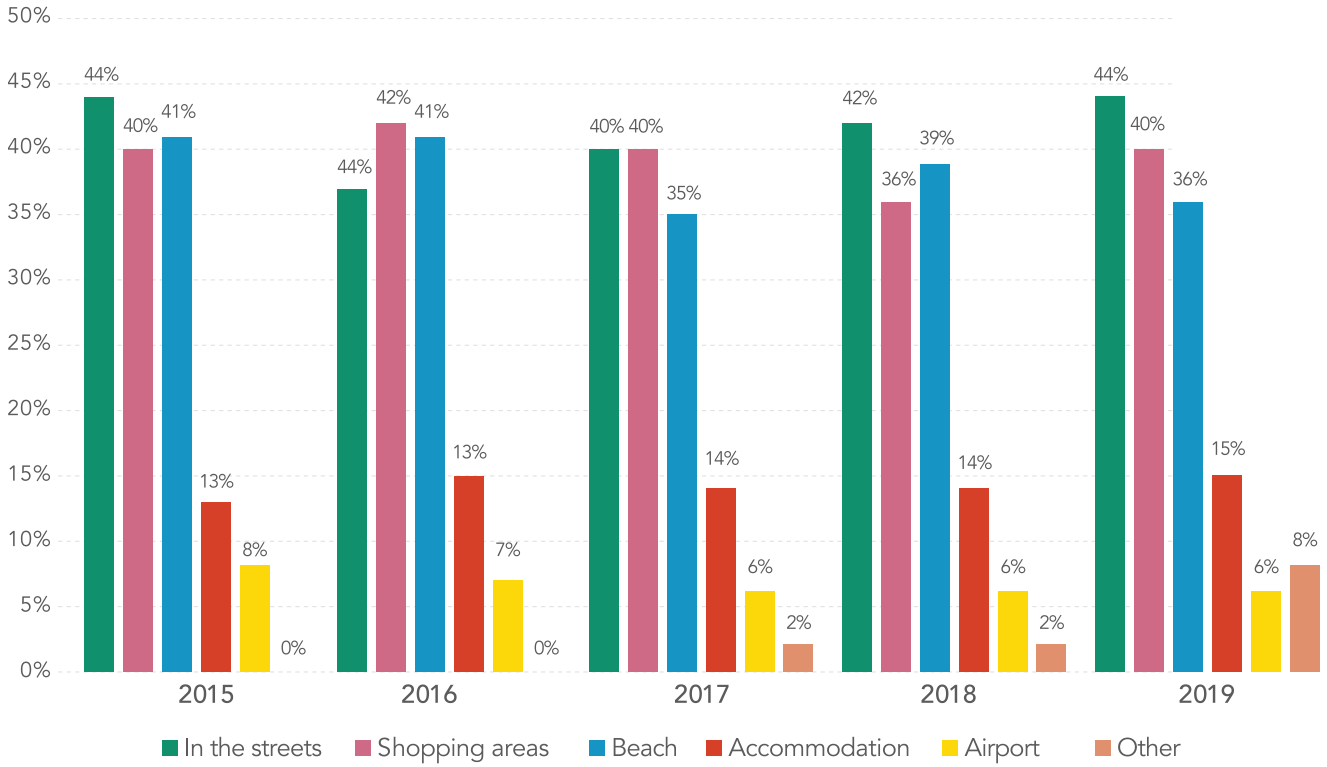


Source: Jamaica Tourist Board

Of the 22% of survey respondents that stated they were harassed in Jamaica in 2019, 80% said that they were pressured to buy things—a year-over-year decrease of 3%—and 54% experienced someone attempting to sell them drugs—an increase of 9% since 2017. Other forms of harassment that respondents dealt with in 2019 include being followed around (23%), pushed into taxis (8%), approached for sex, and pressured to sell foreign currency (both 3%). The most common locations for harassment were in the streets (44%), shopping areas (40%), and beaches (36%)—see Figure 17.

[59] *TPDCo. Visitor Safety & Experience. http://www.tpdco.org/visitor-safety/*

Figure 17: Places Visitors Experience Harassment in Jamaica 2015–2019



Source: Jamaica Tourist Board

These statistics indicate that visitors that experienced harassment on their trip may have been harassed more than once and in multiple locations. While the majority of visitors reported no instance of harassment when visiting Jamaica, the emerging public perception of the destination as unsafe due to these incidents of perceived harassment has prompted tourism stakeholders to express concerns of potential damage to the island's reputation.

Table 14 notes the types of crimes committed against foreign nationals in Jamaica from 2015-2019. Over this five-year period, about 35% of these crimes have been larcenies, 20% have been robberies, 11% have been aggravated assaults and another 11% have been murders.

Table 14: Crimes Committed Against Foreign Nationals 2015–2019

TYPE OF CRIME	2015	2016	2017	2018	2019	TOTAL
Murders	14	8	12	13	7	54
Shootings	2	1	1	1	1	6
Rapes	8	6	6	14	10	44
Aggravated Assaults	8	14	9	6	17	54
Robberies	28	15	13	17	26	99
Break-ins	22	9	2	4	4	41
Larcenies	46	33	34	17	38	168
Indecent Assaults	1	3	4	5	1	14
Malicious Destruction of Property	1	1	0	0	1	3
Other Summary Offences	2	0	0	0	0	2
TOTAL	132	90	81	77	105	485

Source: Ministry of National Security, 2020

The MNS has identified the following as major security risks and threats to tourism in Jamaica, which are considered critical security elements of Destination Assurance:

- Harassment
- Poor governance
- Health issues
- Natural disasters
- Drugs
- Human trafficking
- Smuggling of firearms
- Corruption and scamming
- Cybercrime and terrorism
- Crime and safety
- Negative cultural practices
- Transport

The MNS has also reported that these are the main incidents that are occurring to tourists around the resort areas:

- Legal and illegal taxi operators "jostle" for passengers
- Illegal horseback riding solicitation on the beach
- Hair braiding solicitation on the streets
- Approached for sex or to purchase sexual favours
- Approached to sell foreign currency
- Illegal tour guides soliciting tours on the street
- Illegal rafting solicitation along the Rio Grande River and White River
- Pressure to buy goods and services they do not wishto buy
- Approached to buy drugs
- Approached to have the services of guides
- Begging
- Verbal abuse and threats by persons who refuse to take no for an answer

Table 15 shows the locations of crimes committed against foreign nationals from 2017–2019. Over the past three years, just over half of these crimes were committed in public spaces, 30% in tourism entities, and 19% in private dwellings.

Table 15: Locations of Crimes Committed Against Foreign Nationals 2017–2019

LOCATION OF CRIME	2017	2018	2019	TOTAL
Tourism Entities	26	23	30	79
Private Dwellings	12	23	15	50
Public Spaces	43	31	60	134
TOTAL	81	77	105	263

Source: Ministry of National Security, 2020



6. External Factors Impacting Destination Assurance

Our analysis includes a comprehensive scan of the environmental context that affects tourism and destination assurance in Jamaica and the changes that occur in this context. This external scan presents relevant political, economic, social, technological, environmental, legal and ethical (PESTELE) factors.

A SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) will then be used in the subsequent section of the Situation Analysis to interpret the findings from the PESTELE analysis. The PESTELE helps to pinpoint opportunities and threats in particular. The strengths and weaknesses reflect important issues associated with the governance, implementation and sustainability of Jamaica's National Destination Assurance Programme.

A. Political

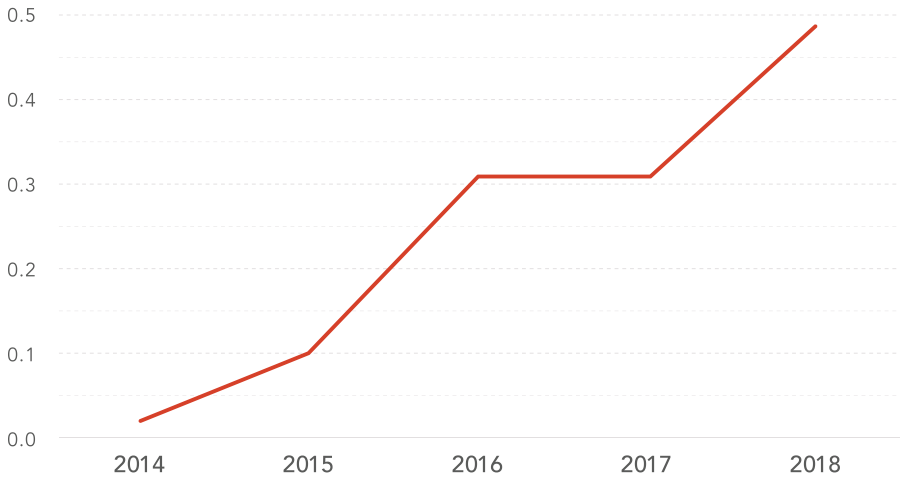
Government of Jamaica's prioritization of tourism

The WEF's TTCI published in 2019 ranked Jamaica exceptionally well—second in the world—in the area of Prioritization of Travel and Tourism due to government prioritization, spending, and effectiveness in tourism marketing. Jamaica also ranked in the top third of countries for Tourist Service Infrastructure (40 of 140) thanks to its high scores for quality of tourism infrastructure (10 of 140), port infrastructure (33 of 140) and air transport infrastructure (35 of 140). It is evident that there is high political will to support tourism's continued growth despite the global pandemic.

Political stability steadily improving

Jamaica's political stability index and ranking has improved steadily over the past five years.[60] The Political Stability Index (–2.5 weak; 2.5 strong) ranks 195 countries worldwide and measures perceptions of the likelihood that the government will be destabilized or overthrown by unconstitutional or violent means, including politically motivated violence and terrorism. The world average in 2018 was –0.05 points, and as shown in Figure 18, Jamaica's score for that year is 0.49 points. Jamaica ranked 68 of 195 countries in the same year. This scenario provides a good environment for tourism development and investment.

Figure 18: Political Stability Index – Jamaica 2014–2018



Source: TheGlobalEconomy.com; The World Bank



[60] *Jamaica: Political Stability. TheGlobalEconomy.com. https://www.theglobaleconomy.com/Jamaica/wb_political_stability/*

Economic downturn forecasted

The tourism sector in Jamaica is considered a mature market and "sun, sea and sand" is the main tourism product. The destination has experienced strong year-on-year growth for the past ten years up until the novel coronavirus brought tourism to a full halt in the first quarter of 2020. Jamaica's recent progress towards economic stabilization will be dramatically impacted by COVID-19. Figure 19 illustrates the Inter-American Development Bank (IDB) estimates of impacts to GDP in 2020 for Jamaica and several other Caribbean nations. The worst-case scenario, based on a 75% decrease in tourism arrivals, estimates that Jamaica's GDP could decrease by 5.4% relative to pre-crisis expectation.[61] Investments and remittances are also expected to decrease considerably.

Figure 19: Impact of COVID-19 Pandemic on GDP for Select Caribbean Nations

Tourism Shock Scenarios: Impact of the COVID-19 Outbreak on GDP
(Percentage point loss of real GDP relative to pre-crisis baseline estimates for 2020)

	SHOCK DURATION	SHOCK MAGNITUDE (PERCENT LOSS OF TOURISM ACTIVITY)		
		25%	50%	75%
The Bahamas	April 1 to end-June	1.3	2.5	3.8
	April 1 to end-September	2.3	4.6	6.9
	April 1 to end-December	3.5	7.0	10.5
Barbados	April 1 to end-June	0.7	1.4	2.1
	April 1 to end-September	1.2	2.5	3.7
	April 1 to end-December	2.2	4.3	6.5
Guyana	April 1 to end-June	0.2	0.3	0.5
	April 1 to end-September	0.3	0.6	0.8
	April 1 to end-December	0.5	0.9	1.4
Jamaica	April 1 to end-June	0.6	1.2	1.8
	April 1 to end-September	1.1	2.2	3.3
	April 1 to end-December	1.8	3.6	5.4
Suriname	April 1 to end-June	0.1	0.1	0.2
	April 1 to end-September	0.1	0.3	0.4
	April 1 to end-December	0.2	0.4	0.6
Trinidad y Tobago	April 1 to end-June	0.2	0.3	0.5
	April 1 to end-September	0.3	0.6	0.9
	April 1 to end-December	0.5	1.0	1.5

Sources: Author's calculations based on data from The Bahamas: Tourism Today Report; Barbados: Deparment of Stadistics; Jamaica: Bank of Jamaica and Jamaica Tourist Board; the World Bank/World Travel and Tourism Council (WTTC).

Source: Inter-American Development Bank, 2020

The economic downturn may result in potential budget cuts to the public sector that may affect tourism agencies such as JTB, TPDCo and TEF whose funding is largely attributed to tourism tax revenue. In a recent study conducted by the CTO and The George Washington University International Institute of Tourism Studies (GW IITS), 61% of the 16 surveyed CTO member states have had to reduce their budget as of May 2020 due to the financial impacts of the COVID-19 pandemic. The other 39% did anticipate future budget cuts. While the study found that these budget cuts had not yet impacted employment levels for the majority of the surveyed destination organisations, the findings indicate that most will need financial support in the near future and should consider how to diversify their funding sources.[62]

[61] *Coley-Graham, T. (2020). Weathering the Coronavirus Storm in the Caribbean. Inter-American Development Bank. https://www.iadb.org/en/improvinglives/weathering-coronavirus-storm-caribbean.*

[62] *The George Washington University International Institute of Tourism Studies. (2020, June). Destination Organization Responses to COVID-19 - CTO Member Countries. Caribbean Tourism Organization. https://www.onecaribbean.org/wp-content/uploads/CTO-Destination-Organisatons-Responses-to-COVID-19-Report-June-2020.pdf.*

Sustained support to tourism enterprises and tourism workers needed

The government of Jamaica has provided support to tourism enterprises and workers since the early stages of the pandemic. The Business Employee Support and Transfer of Cash (BEST Cash) initiative was announced in late March and provides temporary cash transfers to impacted hotels, tours operators and attractions that are registered with the JHTA based on the number of persons they keep employed.[63] In April, Minister Bartlett announced a six-month moratorium on the payment for licences and of fees by entities in the tourism sector, ending September 2020.[64] The Minister also announced the launch of free online training for tourism workers who were laid off as a result of the COVID-19 pandemic. The initiative, driven by the JCTI, offers 11 free online courses to affected hospitality workers, providing them the opportunity to hone their professional skills and improve their qualifications during the downtime.[65]

The CTO-GW IITS study also assessed economic relief measures implemented across the Caribbean in response to COVID-19. The study found that most measures were only short-term and set to expire at the end of the summer.[66] This is also the case in Jamaica. As visitation numbers and consumer sentiment are estimated to remain low over the next one or two years, economic support for the tourism sector will be needed for much longer. Without sustained financial assistance, tourism enterprises that are operating at less than full capacity will be challenged to remain in business throughout the pandemic. The Ministry of Tourism will need to remain vigilant and advocate for continued support to tourism enterprises.

As the industry begins to recover, it will be important for Jamaica to enact and implement measures that support the ease of doing business. According to the World Bank's annual Ease of Doing Business report, before the COVID-19 pandemic hit in 2019, Jamaica ranked 71 out of 190 economies in terms of ease of doing business. Jamaica was also one of the top ranking economies in the wider Latin America and the Caribbean area. Jamaica performed well in the following categories: Starting a Business (ranked 6th in the world), Getting Credit (15th) and for Resolving Insolvency (34). Jamaica performed poorly in the following categories: Dealing with Construction Permits (70); Getting Electricity (120); Registering Property (85); Protecting Minority Investors (61); Paying Taxes (124) and Enforcing Contracts (119).[67]

Slow recovery from global pandemic predicted

The recovery of tourism is forecasted to be slow since Jamaica's top three markets—the U.S., Canada and the U.K.—are all experiencing economic downturn. Consumer sentiment studies of the U.S. market indicate that travellers remain cautious as the pandemic persists and cases continue to grow across the country. According to Longwoods International's most recent COVID-19 Travel Sentiment (Wave 17), as of late July, 73% of U.S. travellers will change their travel plans in the next six months due to the current trajectory of the pandemic, and less than half (43%) feel safe travelling outside their community.[68] The survey, supported by Miles Partnership, also found that 47% of U.S. travellers have reduced their travel plans, 41% have cancelled a trip completely, 27% changed their travel plans to a destination they could drive to instead of fly, and 15% changed a trip from international to domestic.[69]

[63] *Finance ministers announces details of cash back initiatives. (2020, March 24). Jamaica Observer. http://www.jamaicaobserver.com/latestnews/Finance_minister_announces_details_of_cash_back_initiatives.*

[64] *The Ministry offers moratorium on payment of fees in tourism sector. (2020, April 18). Jamaica Observer. http://www.jamaicaobserver.com/news/ministry-offers-moratorium-on-payment-of-fees-in-tourism-sector_192308.*

[65] *Johnson, R. (2020, April 24). Bartlett Launches Free Online Training For Tourism Workers. TPDCo. https://www.tpdco.org/bartlett-launches-free-online-training-tourism-workers/.*

[66] *The George Washington University International Institute of Tourism Studies. (2020, June). Destination Organization Responses to COVID-19 - CTO Member Countries. Caribbean Tourism Organization. https://www.onecaribbean.org/wp-content/uploads/CTO-Destination-Organisatons-Responses-to-COVID-19-Report-June-2020.pdf.*

[67] *Browne, R. (2019, October 25). Jamaica Improves its Ease of Doing Business score. Jamaica Observer. http://www.jamaicaobserver.com/business-report/jamaica-improves-its-ease-of-doing-business-score-ranks-higher-than-all-other-caricom-countries_178001.*

[68] *Longwoods International and Miles Partnership. (2020, August 4). COVID-19 U.S. Travel Sentiment Survey: 17th Edition. https://www.milespartnership.com/sites/default/master/files/Wave17_Sentiment_Summary_0.pdf.*

[69] *Longwoods International. COVID-19 Travel Survey.*

Stemming economic leakage

Jamaica has had a long-running issue retaining tourism receipts. In recent years, the hospitality sector has retained only about 30% of its earnings. This has improved to about 40% as of May 2019.[70] Based on WTTC's annual review, for every dollar a tourist spends in Jamaica, 40.8 cents now stays in the local economy.[71] While Jamaica's retention rate outperforms the average for the Caribbean region (10–30% retention), there is room for improvement.

Stemming this economic leakage is a top priority for the Ministry. In June 2013, the Tourism Linkages Council was established to create and sustain linkages between the tourism sector and other productive industries, like the agriculture, entertainment, and manufacturing sectors, in order to reduce these leakages.[72] Its primary objectives are to increase the sourcing and consumption of local goods and services and "to create employment while generating and retaining the country's foreign exchange earning potential".[73] The council is responsible for overseeing the coordination and implementation of sustainable strategies for strengthening and facilitating linkages across sectors.[74] Under the council's guidance, a number of successful initiatives and programmes have been launched to provide training and affordable financing, marketing and networking support to SMTEs. The council has played and will continue to play a key role in facilitating linkages to improve Jamaica's tourism dollar retention rate.

Shifting traveller expectations in the new normal

The global pandemic is shifting traveller expectations. Consumer confidence is the new currency. Destinations not only need to excite and attract potential visitors, they must now reassure them more than ever that they can deliver a safe and seamless experience. According to Minister Bartlett, these post-pandemic travellers, which he has branded Generation-C, "will be unsettled by the crisis they have lived through this year, they will need reassurance and evidence that their experience overseas will enhance their lives, not put their loved ones at risk."[75]

In addition to implementing proper cleaning and hygiene protocols, destinations must re-engage with visitors to understand their needs and communicate how they are ensuring visitor health and safety. Recent studies show that travellers are increasingly seeking experiences outdoors and away from crowds to allow them to enjoy nature and safely spend time with their loved ones.[76] This will require product diversification and increased use of technology solutions, even transitioning to virtual products and services in order to limit contact and build resilience.

While safety is the number one priority, it is important that the overall travel experience is also more seamless to gain consumer confidence. McKinsey and Company interviewed travellers from multiple geographies in May 2020 who had travelled in the early months of the pandemic. They found that fragmentation across levels of hygiene and cleanliness programmes and protocols created increased stress and confusion about what actually works and which travel brands and tourism enterprises they could trust.[77] Travellers must be confident in the quality of the entire destination in order to feel safe enough to travel there.

[70] *Silvera, J. (2019, May 1). Jamaica Retaining More Money From Tourism Earnings–Bartlett. Jamaica Gleaner. http://jamaica-gleaner.com/article/news/20190501/jamaica-retaining-more-money-tourism-earnings-bartlett.*
[71] *Jamaica. Retaining More Money.*
[72] *Ministry of Tourism, Government of Jamaica. (2018). Tourism Linkages Network. https://www.mot.gov.jm/page/tourism-linkages-network.*
[73] *MOT, Tourism Linkages Network (2018).*
[74] *MOT, Tourism Linkages Network (2018).*
[75] *Ministry of Tourism, Government of Jamaica. (2020, April 29). Bartlett brands Future Travellers Generation-C. https://www.mot.gov.jm/news-releases/bartlett-brands-future-travellers-generation-c.*
[76] *Destination Analysts. (2020, August 17). Update on American Travel in the Period of Coronavirus—Week of August 17th. https://www.destinationanalysts.com/blog-update-on-american-travel-in-the-period-of-coronavirus-week-of-august-17th/*
[77] *McKinsey and Company. (2020, June 15). Make it better, not just safer: The opportunity to reinvent travel. https://www.mckinsey.com/industries/travel-logistics-and-transport-infrastructure/our-insights/make-it-better-not-just-safer-the-opportunity-to-reinvent-travel.*

The rise of Millennials and Generation Z requires new tourism products, distribution channels and shift to an experience-based economy

Millennials (born 1981–1996) are the largest generation to date, making up 31.5% of the global population.[78] This cohort and Generation Z (born 1997–2012) are travelling frequently from a young age, and have gathered significant travel experience before reaching adulthood.[79] These experiences influence how they organise their trips. They organise their travel itineraries independently, and favour the use of direct online travel agencies. At the same time, Millennials seek destinations that offer memorable and unique experiences that engage them emotionally and physically.[80] They value authenticity, complete immersion in local cultures and direct, close contact with residents.[81] They also support environmental protection and social causes.[82]

Millennials are driving the fast shift from a service to an experience-based economy. This means that tourism enterprises and destination quality assurance managers need to be aware of the emotional aspects of visitor motivation and satisfaction and aim to satisfy visitor aspirations, desires and dreams as well as needs. In the new experience-based economy, visitors are active participants in the service management process rather than passive consumers.[83]

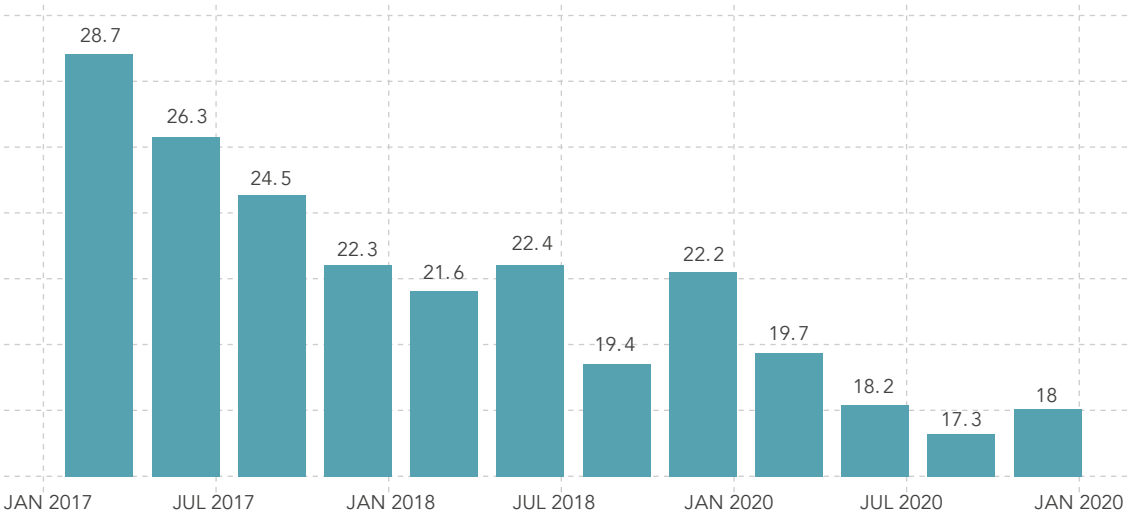
C. Social

Increasing levels of crime and youth unemployment

The Safety and Security component of the WEF TTCI measures the business costs of crime and violence, the reliability of police services, and the business costs of terrorism, and provides an index of terrorism and homicides. In 2019, Jamaica was ranked 131 out of 140 countries on this index. This low ranking reinforces the importance of prioritizing safety and security as an integral component of developing Jamaica as a tourism destination.

The TPDCo Security Audit 2019 indicates that the number of crimes committed against tourists and foreign nationals declined from 171 in 2011 to 77 in 2018. Robbery and simple larceny were the most predominant crimes committed against such visitors during that period. Greater efforts are being pursued to improve Jamaica's level of visitor safety and security.

Figure 20: Youth Unemployment Rate in Jamaica, 2017–2020



Source: Tradingeconomics.com - Statical Institute of Jamaica

[78] *C 75+ Millennials Travel Statistics and Trends for 2020. (2020, February 7). The Wandering RV. https://www.thewanderingrv.com/millennials-travel-statistics/.*
[79] *Travel Pulse. (2014, June 24). Survey Says: Millennials Now Drive Leisure Travel in U.S. http://www.travelpulse.com/news/travel-agents/survey-says-millennials-now-drive-leisure-travel-in-us.html.*
[80] *Veiga, C., et al. (2017). Are Millenials transforming global tourism? Challenges for Destinations and Companies. Worldwide Hospitality and Tourism Themes. 9(6). 603–616. https://doi.org/10.1108/WHATT-09-2017-0047.*
[81] *The Wandering RV.*
[82] *Ibid.*
[83] *Morgan, M., et al. (2009). Has the Experience Economy Arrived? The Views of Destination Managers in Three Visitor-dependent Areas. International Journal of Tourism Research. 11, 201–216. https://onlinelibrary.wiley.com/doi/pdf/10.1002/jtr.719.*

There is a long-standing correlation between youth unemployment and levels of crime. There has been a steady decline in the youth unemployment rate from January 2017 to January 2020.[84] The Statistical Institute of Jamaica has indicated that the country's overall unemployment rate was at a low of 7.3% based on the January 2020 Labour Force Survey. The unemployment rate for youth aged 14 to 24 fell by 2.8 percentage points relative to 2018, to 19%. The unemployment rate for male youth declined by 0.4 percentage points, to 17.5%, while the rate for female youth declined by 5.7 points, to 20.9%.[85] This is encouraging and ongoing efforts to improve unemployment rates are anticipated.

Housing needed for tourism workers

The lack of an adequate supply of affordable housing solutions for tourism workers has long plagued the tourism sector. Jamaica has seen a steady growth of squatter settlements in close proximity to resort areas. In a 2017 survey of hotel industry employees, 85% of the 845 respondents reported that they did not own their home.[86]

The Minister of Tourism, Hon. Edmund Bartlett, announced in his 2020–2021 Budget Speech that they will continue to advance the Resort Squatter Settlements Upgrade Programme. This programme supports the regularization of 535 households in the Grange Pen community in St. James through land titling and infrastructure upgrades, which include paving roads, improving drainage infrastructure, the construction of a sewage treatment plant, the connection to the water system of the National Water Commission and access to electricity. It is anticipated that this project will be replicated in other areas throughout the island.

Inclusion of the local community and SMTEs in tourism

A framework for national support to community tourism was set in place through the establishment of the community tourism policy in 2015. Development of the policy, a community tourism toolkit, training for SMTEs and establishment of a brand and accompanying website and marketing platform for registered community tourism enterprises (i.e. More to Jamaica) was supported with funding from the Jamaica Social Investment Fund and served to expand engagement in that niche area.[87]

These investments in community-based tourism enterprises served to increase local ownership, extend benefits and stem leakage. The policy development process and ongoing engagement with community-based tourism enterprises highlighted challenges faced in meeting basic licensing requirements and ensuring ongoing compliance. TPDCo's product development unit provides strong support to help these enterprises with compliance and packaging of their product experience. A loan facility, with competitive rates, was also established within the TEF to support community tourism product development.

Skilled and protected tourism workforce

Ongoing strategies to improve the cadre of the tourism workforce remain central to Jamaica's enhancement of the product quality. Jamaica has strong tourism training programmes offered by local Universities, Colleges, Secondary Schools and the HEART/NTA. The establishment of the JCTI, which has facilitated the certification of 2,007 people in key areas, is among key mechanisms for ongoing strengthening of the tourism workforce. The responsiveness of the JCTI, as evidenced by the provision of free online training to over 5,000 tourism workers during the COVID-19 pandemic, is a strength.[88] Significant support to the protection of the tourism worker came when the Tourism Workers Pension Act was gazetted in January 2020 and funds in the amount of J$250 million were disbursed to activate the pension scheme in March of 2020.

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[84] Trading Economics. (2020). Jamaica Youth Unemployment Rate. https://tradingeconomics.com/jamaica/youth-unemployment-rate.

[85] Unemployment remains low – STATIN. (2020, April 17). Jamaica Gleaner. http://jamaica-gleaner.com/article/news/20200417/unemployment-remains-low-statin.

[86] Hines, H. (2018, March 19). Give tourism workers houses, Wehby appeals. Jamaica Observer. http://www.jamaicaobserver.com/news/give-tourism-workers-houses-wehby-appeals_128252?profile=1373.

[87] Karwacki, J. (2017, August 4). New Jamaica Community Tourism Toolkit launched. Ecoclub.com member blogs. https://ecoclub.com/blogs/170804-jamaica-community-tourism-toolkit; Ministry of Tourism. (2014). Green Paper No. 2/14, Towards a National Community Tourism Policy & Strategy. https://www.mot.gov.jm/sites/default/files/Community%20Tourism%20Green%20Paper.pdf; Stennett, T. H. (2018, December 9). Contract to Benefit Community Tourism Enterprises. Jamaica Information Service. https://jis.gov.jm/contract-to-benefit-community-tourism-enterprises/; http://www.moretojamaica.com/.

D. Technological

Tourism enterprises are forced to differentiate on services

Search engines and booking sites provide more information and price transparency, empowering the visitor but diminishing tourism enterprises' negotiation power, forcing businesses to differentiate on services, not prices. This trend underscores the importance of ensuring that the national quality assurance programme is effectively assisting tourism enterprises to maintain a culture of excellence and work to continuously improve tourism experiences and services.

The rise of social media has changed travel

The use of social media and mobile phones in trip planning has steadily increased over the past decade. This trend is affecting the visitor and tourism operator relationship in many ways. Today travellers increasingly review and book their travel based on social media reviews and do so on their mobile phone.[89] Social media is now more influential than word-of-mouth travel recommendations. Social media has become the new word of mouth. To be successful, tourism enterprises must ensure that they are using social media effectively as part of their marketing, and that they have a presence on search engines and booking sites. Often SMTEs need capacity-building support to keep up with e-marketing, social media, and their online presence.

User-generated content drives consumer loyalty

Consumer expectations, behaviours and decisions are increasingly influenced by social media, which refers to user-generated content and interactivity on internet sites, e.g. social media and review sites. Consumers are also more likely to share their grievances on social media and review sites. This trend demands highly responsive customer service. Tourism enterprises also need to ensure that they have the capability to resolve conflicts and protect their brand online. Online grievances can seriously damage a business's reputation if not managed well. Many destinations are now using user-generated content to track visitor feedback at the destination level and are using it to proactively identify quality assurance issues as well as attraction management issues such as overtourism.

Increased competition posed by the sharing economy

The explosive growth of sharing platforms such as Airbnb challenges the conventional business model and introduces greater competition for traditional service providers. In 2018, the World Bank Group conducted a rapid assessment of the peer-to-peer accommodation industry in Jamaica. The study found that while these types of accommodations represent a very small share of Jamaica's overall tourism market (just 2.5% of all international arrivals to Jamaica used Airbnb in 2017), the sector provides a number of opportunities and challenges for the government, the local community, and the competition.[90] These are summarized in Table 16.

[88] *Minister of Tourism. (2020, June 24). Sectoral Presentation 2020/2021.*
[89] *Gonzalo, Frederic. (2016). 16 Stats About Mobile Travel in 2016, Frederic Gonzalo (Vol. 2017).*

Table 16: Opportunities and Challenges of the Sharing Economy in Jamaica

OPORTUNITIES	CHALLENGES
Helps attract new markets and demographics to new and existing destinations.	May be unregistered and unregulated.
Influences the type and nature of visitor purchases and services.	May not be following tax laws.
Lowers the barriers to entry for entrepreneurship.	Can cause disturbances in residential communities.
Supports homeowners and helps prevent displacement.	May cause housing prices and rents to increase.
Enables the dispersion of tourists in a wider geographical area.	May put visitors at higher risk.
Increases access to market, which is particularly helpful for community-based homestays.	May benefit a small minority.
Provides flexible inventory to meet the rise and fall of demand and assists in times of crisis.	

Source: The World Bank Group, 2018

The study also found that most peer-to-peer accommodation providers in Jamaica opt not to obtain a licence as the process for licensing homestays is too cumbersome, requiring too many forms from too many organisations.91 The government therefore does not know the true size of the market, cannot fully control visitor safety, and cannot enforce existing regulations and tax collection.[92] The current lack of quality control around sharing economy offerings and the effect that a potential incident could have on Jamaica's reputation is cause for concern. Improved processes, low-cost training, and minimum standards are all needed to enforce and monitor quality assurance across peer-to-peer operators.

[90] *World Bank Group. (2018). Tourism and the Sharing Economy: Policy & Potential of Sustainable Peer-to-Peer Accommodation. http://documents1.worldbank.org/curated/en/161471537537641836/pdf/130054-REVISED-Tourism-and-the-Sharing-Economy-PDF.pdf*

[91] *World Bank Group (2018).*

[92] *World Bank Group (2018).*

E. Environmental

Impacts of disasters including climate change to destination appeal, operating costs and risk management

Disasters, both natural and man-made, can negatively impact tourism numbers in affected areas and degrade tourists' experiences. In Jamaica, the impact of hurricanes has resulted in a decline in the health of coral reefs, loss of sea-grass beds, and severe beach erosion, all of which impact the visitor experience.

The State of the Jamaican Climate 2015 report notes that climate change will directly impact the tourism sector through tourist arrivals, increased incidents of beach erosion, and the degradation of both the natural environment and near-shore water quality (e.g. through sargassum events).

Tourism infrastructure is also vulnerable to sea level rise, extreme rainfall events and hurricanes, with expectations of increased infrastructure damage, additional emergency preparedness requirements and business interruptions due to floods, coastal inundation and extreme events—all of which could lead to cancellation of reservations or displacement of visitors resulting in loss of revenue. Increasing temperatures may lead to heat-related illnesses (heat stress and stroke) among workers and guests and higher operational costs for access to cooling.

The COVID-19 pandemic continues to have devastating impacts on the tourism sector in Jamaica as travel was abruptly halted and tourist numbers have rapidly declined. This has resulted in loss of employment for many persons who directly or indirectly rely on tourism and has also reduced the sector's contribution to Jamaica's GDP.

Predictions of more extreme weather events such as hurricanes, more intense drought, periodic influxes of Sargassum that overwhelm Jamaica's coastline, an increase in vector-borne illnesses and impacts from global pandemics and other hazards call for greater levels of preparedness by the tourism sector. The implications of increased operating costs for preparation, hazard and risk management planning, adaptation and mitigation approaches become important considerations.

More efforts needed for environmental sustainability

Jamaica's natural and built environments and overall approach to environmental sustainability are important elements that give the country's tourism product a competitive advantage. The WEF TTCI ranked Jamaica poorly in Environmental Sustainability (137 of 140) in 2019.[93] Between the 2017 and 2019 assessments, Jamaica's score decreased in the areas of Natural Resources and Environmental Sustainability. These indices are informed by policy indicators such as the stringency and enforcement of the government's environmental regulations and variables assessing the status of water, forest resources, and marine life (with fish stock status as proxy).

Jamaica lacks adequate monitoring and enforcement of natural resource management laws and will therefore need to significantly improve its performance in these areas. More recently, the Ministry of Tourism launched a Tourism Environmental Stewardship Initiative that aims to strengthen the capacity of the tourism sector and its stakeholders in environmental management and sustainable tourism practices. A training manual for the tourism sector has been produced as part of this initiative to help raise environmental awareness and enhance compliance with existing environmental regulations.[94] Strategies that could be employed or strengthened by the sector to mitigate to and adapt to the effects of climate change, include: increasing use of clean/renewable energy sources and applying a low-carbon development strategy; protecting natural ecosystems, particularly those ecosystems that play a critical role in shoreline protection including mangroves, seagrass beds and coral reefs; sustainable consumption and production (net zero waste); enhancing resource efficiency; integrating green procurement into supply chain management; implementing more far-reaching environmental stewardship programmes and supporting environmental education and awareness within the sector. Issues related to environmental management and climate change must continue to be mainstreamed in key policy and strategy documents governing the sector.

Climate change adaptation, disaster risk reduction and environmental sustainability are interrelated responses that can mitigate tourism destination- and enterprise-level risks and build resilience.

[93] *World Economic Forum (WEF) (2019). Jamaica Travel & Tourism Competitiveness Index 2019 edition. http://reports.weforum.org/travel-and-tourism-competitiveness-report-2019/country-profiles/#economy=JAM.*

[94] *Minister of Tourism. (2020, June 24). Sectoral Presentation 2020/2021.*

F. Legal

Section IV, B. Legislative Framework for Destination Assurance in this Chapter provides an overview of the legal factors that affect tourism and destination assurance in Jamaica.

G. Ethical

Protection of children, women and marginalised communities

Jamaica is committed to ensuring that its tourism product represents high ethical standards that safeguard the integrity of human beings. Employment practices ensure that there is gender equity and equal opportunity for all. The Global Report on Trafficking in Persons (2018) by the United Nations Office on Drugs and Crime indicated that sexual exploitation was the main reason for which persons were trafficked in Central American and the Caribbean. The U.S. State Department's June 2019 Trafficking in Persons Report lists Jamaica as a Tier 2 country, which means that the government does not fully meet the minimum standards of the Trafficking Victims Protection Act but is making significant efforts to comply with those standards. The Ministry of Tourism has representation on key national committees charged with detecting and stopping human trafficking, such as the National Taskforce against Trafficking in Persons (NATFATIP).

Corporate social responsibility

Many accommodations, attractions and other enterprises have voluntary practices and initiatives that demonstrate that they are giving back to Jamaica and the communities in which they operate. For example, many tourism enterprises support staff and their families in various ways and seek to facilitate training and job opportunities for youth and other individuals at risk. Tourism enterprises also seek to ensure that there is no discrimination against people who may be HIV-positive or who belong to other marginalised groups.

7. Strengths, Weaknesses, Opportunities, Threats

This section of the Situation Analysis presents an interpretation of the strengths and weaknesses associated with the existing tourism licensing system. Strengths and weaknesses were identified from a side-by-side analysis of Jamaica's tourism licensing system and the global benchmark derived from a review of global national quality assurance programmes and global and regional standards. The opportunities and threats were identified from the PESTELE.

Table 17: Destination Assurance—Strengths, Weaknesses, Opportunities and Threats

STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Prioritization of tourism including a fairly strong legislative framework	No focus on continuous improvement	Shift to an experience-based economy	Economic downturn and slow recovery
Compelling incentives offered to licensed tourism enterprises	Lack of destination stewardship guidelines for DACs	Tourism enterprises are forced to differentiate on service	Increasing crime and youth unemployment
Local destination quality assurance management mechanism exists	Complex licensing system requiring time and costs, contributing to low compliance levels across SMTEs	Product development and diversification	Increased competition and lack of regulation of the sharing economy
Inclusion of communities and SMTEs in tourism	Lack of automated system	International and regional funding for climate change	Vulnerability to hazards/ disasters such as natural disasters, vector-borne diseases and climate change
Robust funding mechanisms for product development and SMTEs	Visitor satisfaction areas of concerns: variety of shops, variety of things to do, ease of finding way around, tourism information, beaches, attitude of people, water sports activities	Destination Assurance is a driver of tourism sustainability	Deteriorating environment
	Visitor safety and security		
	Gaps in tourism enterprise standards: community engagement and support; involvement of community; environmental sustainability; climate risk management; disaster risk management; digital distribution marketing; business development; monitoring and enforcement		

A. Strenghts

Prioritization of tourism

The Government of Jamaica has demonstrated its commitment to prioritization and investment in tourism. There is also a fairly strong legislative framework for tourism and quality assurance in general.

Compelling incentives offered to licensed tourism enterprises

TPDCo offers a robust set of benefits to licensed tourism enterprises which include fiscal incentives as well as marketing listings by the JTB. There is also a minimal level of business development support provided through the quality auditing process although there is considerable room for improvement in this area.

Local destination quality assurance management mechanism exists

The Ministry of Tourism and TPDCo recognise that there are destination-level issues such as cleanliness of the place, safety and security in public spaces, and availability of adequate public amenities and services that require strategic management at a local destination level. In this context, they have established DACs with multi-sectoral representation and assigned Destination Managers to address destination-level issues.

Inclusion of communities and SMTEs in tourism

A robust framework is enabling the inclusion of local communities in tourism. This framework consists of a policy, extensive investments in supporting the establishment, licensing of community-based SMTEs, and affordable financing options. A tiered system of readiness supports engagement and provides technical support to community-based SMTEs in the National Destination Assurance Programme. However, considerable ongoing technical assistance and support will be needed to achieve the full potential of Jamaica's community-based tourism strategy. This strategy is playing a critical role in spreading benefits to local communities and reducing economic leakage.

Robust funding mechanisms for tourism product and SMTEs

TEF stands out in the region, and the world, as a compelling model for tourism product development funding. TEF is capitalized by a levy charged to international visitors (stayover and cruise). TEF provides support to ministries and agencies for heritage and environmental management. SMTEs and non-governmental organisations are also beneficiaries of TEF funding. TEF has been leveraged to support SMTEs through direct loan facilities, grants and special loan arrangements through partner financial institutions including the Jamaica National Bank and a $1-billion TEF/Export-Import Bank of Jamaica (EXIM) loan facility. TEF is also providing seed funding of $1 billion dollars for the Tourism Workers' Pension Scheme. TEF funding could be leveraged to support key destination assurance initiatives.

B. Weaknesses

No focus on continuous improvement

Jamaica's National Destination Assurance Programme is mainly focused on ensuring that tourism enterprises are meeting a minimum standard, and is a compliance-based system. The programme does not support continuous improvement, which is critical to instilling a culture of excellence and motivating tourism enterprises to not only meet but exceed visitor expectations. There is an opportunity to evolve the current programme to foster continuous improvement and go beyond basic approval requirements. Continuous improvement of performance and quality management needs to be encouraged or incentivised.

While there are several business development providers such as TEF, JAMPRO, and JBDC in addition to TPDCo, there is no evidence of formal coordination and cooperation occurring around the National Destination Assurance Programme. There is an opportunity to integrate these resources into the National Destination Assurance Programme.

Lack of destination stewardship guidelines for DACs

While DACs have been in operation for the past few years, there isn't a standard or set of guidelines for local destinations that helps them to understand and implement key criteria and indicators for sustainable destination management. There is an opportunity to look at the destination standards that exist globally to help inform strategic guidelines for DACs to ensure consistency across local destinations throughout Jamaica.

Complex licensing system requiring time and costs, contributing to low compliance levels across SMTEs

There is a wide network of MDAs involved in the implementation of the National Destination Assurance Programme, as explained in prior sections of the report. This presents challenges to TPDCo—the main overseer of the system—as well as to tourism enterprises using the system, who state that there are too many steps and procedures, each requiring time and fees.

TPDCo reports that the costs associated with the National Destination Assurance Programme translate into a significant barrier for SMTEs, which is an important factor impacting the sustained low levels of compliance. Opportunities to streamline the process through the development of an integrated system for quality assurance and establishment of a "one-stop shop" facility for all tourism-related approvals and requirements will need to be assessed further.

Lack of automated system

While TPDCo does maintain a database of licensed tourism enterprises, the licensing and compliance verification process is all manual, consisting of paper-based applications and paper-based auditing checklists. This manual system limits the ability of TPDCo to manage this complex system and track performance of tourism enterprises over time. There is an opportunity to consider the feasibility of an automated and fully integrated quality management system that can create efficiencies and allow MDAs involved in the process to share information and coordinate more effectively.

Visitor satisfaction areas of concern

While the overall snapshot of visitor satisfaction is positive, there are a few trends that provide insights regarding the effectiveness of the National Destination Assurance Programme and identify quality attributes that may need attention:

- For stopover visitors, while visitor satisfaction has slowly increased over the past five years, the percentage of respondents indicating that they were very satisfied with their time in Jamaica is definitely decreasing. Repeat stopover visitors have been decreasing over the past three years. A similar trend is evident for cruise visitors. Cruise visitors provided the lowest scores for Likelihood of a Return Visit and Likelihood of Recommending, indicating that cruise visitors are not too likely to visit Jamaica again or recommend it to others.[95]
- When compared to 36 countries in the Greater Caribbean, Jamaica scores below average for all categories of cruise passenger satisfaction in the latest BREA report. Jamaica's mean score for Overall Visit is 0.64 points below the average of all 36 destinations included in the BREA report.
- The attributes that stopover visitors have rated the lowest over the past five years or which are seeing a decline in satisfaction scores are:
    - Tourism information/visitor centres
    - Ease of finding your way around
    - Beaches
    - Accommodation facilities
    - Attitude of people
    - Water sports activities
- The satisfaction categories that cruise visitors scored the lowest after Return Visit and Likelihood of Recommending in 2018 are:
    - Overall Price
    - Visit Met Expectations
    - Variety of Shops
    - Variety of Things to Do and See

These insights will be used to inform the recommendation for evolution of the National Destination Assurance Programme. Furthermore, there is an opportunity for TPDCo to use social media listening to provide more timely insights about what visitors are saying about the destination.

Visitor Safety & Security Concerns

One in every five respondents (stayover visitors) of the JTB's exit survey reported being harassed while visiting Jamaica in 2019. In years prior, it was one out of every four respondents. WEF's TTCI published in 2019 flagged Safety and Security as an area for improvement. Jamaica was ranked 131 of 140 countries on Safety and Security. This notably low ranking is attributed to poor rankings for homicide rate (137 of 140), business costs of crime and violence (135), and reliability of police services (103).[96] While the Ministry of Tourism recognises this problem and has taken definitive measures to address it, safety and security considerations still remain among the primary areas of improvement for Destination Assurance.

Gaps in tourism enterprise standards

Community engagement and support. The standards do not include criteria associated with society and people. There is an opportunity to introduce criteria that encourage community engagement and support to ensure a positive relationship between tourism enterprises and the communities in which they operate. Community engagement and support needs to be strengthened to make tourism a viable non-seasonal career option for more Jamaican workers, and to ensure that tourism enterprises maintain their licence to operate long term.

Authenticity of product; involvement of community. To build on the considerable investments Jamaica has made in developing and promoting community and heritage tourism, it is essential that criteria related to promotion and protection of culture and tradition as well as social well-being be considered within standards so that these areas of tourism can realise their full potential.

[95] It is important to note that these two categories score the lowest across all cruise destinations in the Caribbean that are included in the BREA reports.

[96] World Economic Forum (WEF). (2019). Jamaica Travel & Tourism Competitiveness Index 2019 edition. http://reports.weforum.org/travel-and-tourism-competitiveness-report-2019/country-profiles/#economy=JAM.

Environmental sustainability. There are many laws related to environmental management in tourism. This is because many of the environmental laws and policies that are regulated and enforced by NEPA and other agencies are underpinned by the country's commitment to multinational environmental agreements. While environmental criteria related to sanitation, water supply and waste management are included in the standards, there are no explicit standards for sustainability in the requirements for licensing. For example, there is not enough prescriptive guidance in the licensing requirements for reducing energy and resource use, educating and involving guests, engaging and involving staff, and investing in enhancing the operating environment.

This is especially the case for attractions and accommodations, which are two of the largest subsections and hence are consequential to Jamaica achieving its national goals in environmental sustainability. In the transportation subsector, there is also little direction on how to pivot the sector towards meeting the needs of visitors who are interested in more sustainable options. Additionally, there is a need to devise a common environmental rating system, as currently many rating systems are being used.

These efforts can go a long way to ensure that the tourism sector is playing its rightful role in enhancing Jamaica's poor performance on environmental sustainability already flagged in the WEF Travel & Tourism Competitiveness Index.

Climate risk management. Jamaica is already experiencing impacts of a changing climate and these negative impacts are forecasted to intensify. It is important to note that criteria for climate change adaptation and mitigation are lacking in the standards for tourism enterprises. Any efforts by tourism enterprises are voluntary, since there are no goals set for the tourism sector at a national level. Inclusion of criteria encouraging tourism businesses to respond to the current and future impacts of a changing climate and report on their efforts should be considered; this will ensure greater resilience of the tourism sector.

Disaster risk management. Disaster preparedness and management (for natural and man-made hazards) are critical for tourism enterprises and site managers. Inclusion of criteria related to disaster risk management should be considered in the standards for tourism enterprises, in particular for subsectors such as hotels and tour operators, as is already the case for attractions. Examples of criteria to be covered in the standards include communications with visitors and staff, psychosocial support for visitors and staff, evacuation of visitors, and business continuity planning. Disasters inevitably bring about crises. It is the degree to which people are prepared for disaster that determines how vulnerable or resilient their enterprise and community will be.

Digital distribution marketing. As discussed in the PESTELE analysis, global trends indicate that travellers are increasingly using social media and mobile phones in trip planning. They are also using search engines and booking sites. Social media has become the new word of mouth. To be successful, tourism enterprises must have a presence on search engines and booking sites, and the capacity to resolve conflicts and protect their brand online. This is no longer optional but critical to their survival and success.

SMTEs often struggle to keep up with technology and ever-changing digital distribution trends and need support in this area. There is a need to ensure that the improved quality management system includes support for e-commerce essentials in order to enhance competitiveness of SMTEs.

There has not been a targeted focus on digital distribution marketing or on meeting best practice standards relating to the digital experience of customers. In general, there does not appear to be a mechanism to help individual tourism entities identify new markets, although the JHTA is advocating for more marketing assistance for smaller properties as a group. In some markets, there is a greater focus on niche modules where subsectors such as adventure tours are accredited, but this is not widely used in the Jamaican context.

Business development. The current quality assurance standards do not include any considerations of the business development systems that are critical for continuous improvements in operations. These include but are not limited to reservation and payments, business information, business planning, asset registration and maintenance, and some aspects of communication with visitors such as pre-arrival information that tells visitors what to expect.

Monitoring and enforcement. Many key laws and regulations, such as the River Rafting Act, are in the process of being amended and can improve compliance. A review of 37 documents revealed that many of the necessary standards are described by legislation and supporting policies. There are also synergies between the various laws and policies that can be used in the standards development process. Examination of these synergies can also help in identifying where parameters are covered by multiple laws and policies, to ensure that there are no conflicting directives. However, for standards to matter, monitoring, enforcement, education and awareness must be improved.

C. Opportunities

Based on the PESTELE, there are five main opportunities for Jamaica's National Destination Assurance Programme. These are outlined below.

Shift to an experience-based economy

Market demand for memorable, unique and engaging experiences is growing rapidly. The ability of destinations to provide authentic and immersive experiences and support social and environmental causes will no longer be just a competitive advantage, but a requirement to remain competitive. Jamaica has invested greatly in developing community-based tourism, which aligns well with the market's increasing desire to connect with local culture and residents during their travels. Prioritizing both community-based tourism and destination assurance will support Jamaica in shifting from a service-based to an experience-based economy.

Tourism enterprises are forced to differentiate on service

There is more extensive pricing information publicly available on search and booking sites than ever before. This transparency diminishes the negotiating power of enterprises and requires them to differentiate on services rather than prices. To be successful, tourism enterprises must ensure that they maintain a presence on search engines and booking sites as well as their own websites and social media accounts. This trend justifies the need for a national destination assurance programme that supports tourism enterprises in online marketing training and delivering, monitoring, and continuously improving high-quality services.

Product development and diversification

The COVID-19 pandemic has significantly impacted traveller expectations. Listening and catering to visitor needs and preferences is essential to win consumer confidence. Health and safety are top of mind when travellers plan their trips; therefore, delivering a safe and seamless experience should be top priority for destinations during these times.

Diversification and development of safe yet appealing tourism products that limit crowding and contact will be important strategies to drive visitation of more safety-conscious travellers. Outdoor and recreational experiences will become even more important. A national destination assurance programme will support diversification and development by providing tourism entities with the training, resources, and guidelines to implement proper health and sanitation protocols to ensure that visitors have a safe, seamless, and exceptional experience in Jamaica.

International and Regional Funding for Climate Change

There is growing global and national recognition of the threat of climate change. There are considerable opportunities to access global and regional funding from a wide range of multilateral sources, such as the Green Climate Fund, that can help enhance the resilience of Jamaica's tourism product. Jamaica's strong Climate Change Division has expertise in securing funding for climate change and disaster risk management projects that can be leveraged to develop new climate change and disaster risk management initiatives to support the tourism sector and the National Destination Assurance Programme in particular.

Destination Assurance is a driver of tourism sustainability

The quality of Jamaica as a tourism destination is a key component of its competitiveness and essential for its longevity. According to the UNWTO's definition of quality of a tourism destination, quality should not be measured solely on the perspective of customer satisfaction, but also in terms of the social, economic and environmental impacts of tourism. Sustainability is therefore an attribute of quality, and consequently of Destination Assurance as well. One of the main tenets of Destination Assurance is the promotion of sustainable management of tourism enterprises and local destinations through actions that balance their needs with support for the local community and protection of cultural and natural heritage. Implementing a National Destination Assurance Programme would provide an opportunity to further integrate and increase the uptake of sustainable practices across the tourism sector, which in turn would improve the destination's competitiveness and sustainability.

D. Threats

Economic downturn and slow recovery

A slow tourism recovery from the global pandemic is predicted due to economic downturns in major source markets—the U.S., Canada, and the U.K. in particular. Destinations and tourism enterprises throughout the Caribbean are greatly hurting from this sharp decline in visitation. They will need sustained support even as visitation numbers begin to rise to ensure they have the financial, health and sanitation, and human resources in place to remain in business.

A national destination assurance programme must address these challenges to ensure that all tourism enterprises, no matter how large or small, have the capacity, resources, and resiliency needed to survive the downturn and recover in a sustainable manner.

Increasing crime and youth unemployment

Jamaica has consistently ranked poorly on safety and security in the WEF TTCI as highlighted previously in this report. Furthermore, Jamaica has been the subject of travel advisories from different countries periodically which make reference to violent crimes, robberies and sexual assaults occurring frequently, including at all-inclusive resorts. These advisories coincide with MNS data which indicates that 35% of all crimes committed against foreign nationals in Jamaica over the past five years have been larcenies, 20% have been robberies, 11% have been aggravated assaults and another 11% have been murders. Youth unemployment is often correlated to increases in crime. While this is a persistent challenge in Jamaica, data from recent years reveals that youth unemployment is steadily decreasing. The economic fallout from COVID-19 has the potential to reverse this positive trend. Sustained investments in addressing youth employment are critical for ensuring that Jamaica is a safe place to live, work and visit.

Increased competition and lack of regulation of the sharing economy

While the rising popularity of sharing economy offerings can help attract new markets and increase local employment opportunities, it also can unfairly increase local competition and put both visitors and residents at risk when the offerings do not adhere to existing regulations. The current lack of regulation and quality control around the sharing economy in Jamaica has the potential to significantly impact the destination's reputation should an incident arise. Improved low-cost training and minimum standards codes through a national destination assurance programme are necessary to ensure and enforce a high level of quality across the sharing economy.

Vulnerability to hazards/disasters

Threats associated with a wide range of potential hazards/disasters including man-made and natural disasters, vector-borne diseases and climate change result in higher operational costs for the country and enterprises. Local destinations and tourism enterprises need to ensure preparedness and be able to higher costs for disaster response where there is physical damage to tourism infrastructure and ecosystems. There is also the threat of reduced visitor traffic as more climate conscious tourists try to minimise long-haul travel. Climate variability, e.g. warmer climate and more rain, may impact destination appeal and ultimately result in lower visitor arrivals. Climate change is also impacting sectors that support tourism, e.g. water, agriculture, transportation, and energy.

Strong mitigation strategies need to be employed as a country and a sector to reduce the tourism carbon footprint. Adaptation measures around cooling and managing health impacts will also be important. The finalisation of the draft climate change policy and development of important pieces of legislation to mainstream mitigation and create mandatory GHG reduction obligations will be important. The National Destination Assurance Programme will need to incorporate climate change criteria as already flagged and discussed in this section.

Deteriorating environment

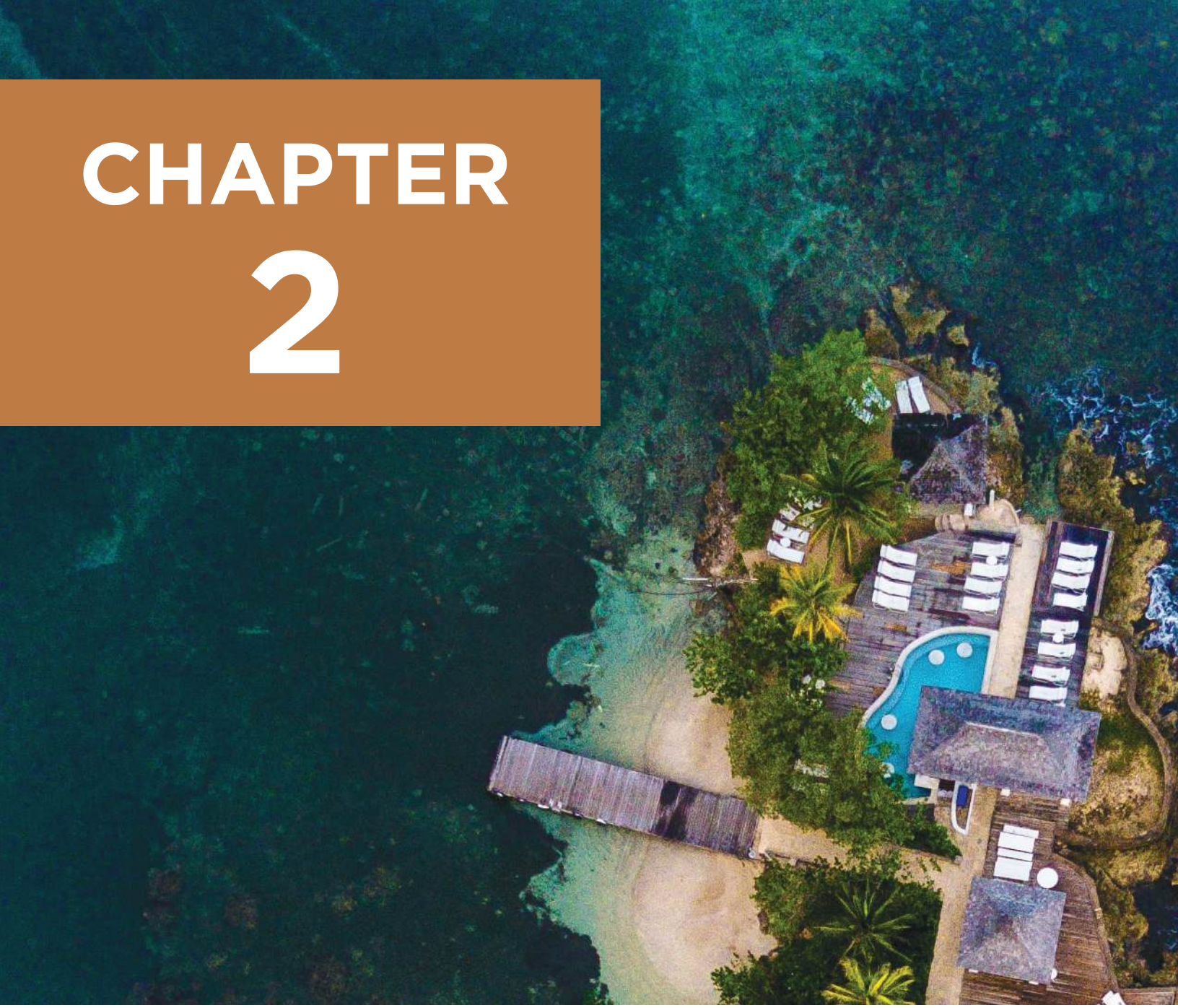
The inability to monitor and enforce adherence to important environmental regulations and standards poses a significant threat to Jamaica's tourism, especially where natural and cultural resources are primary factors that draw visitors to the destination.

There is also a threat of competition from other destinations in the region that have a better track record in managing impacts on natural resources. Legislation amendments to make important environmental standards mandatory, financial and other resources to strengthen monitoring and enforcement as well as public education and awareness programmes will be critical for an effective DAFS.

NEPA's presence on the DACs is helpful, but it is critical to actively and continuously impress upon all DAC members the importance of mitigating negative environmental impacts and maintaining environmental integrity in support of a sustainable tourism product.



CHAPTER 2



VISION

This chapter outlines the vision, goals and overarching strategy for the new and improved National Destination Assurance Programme. A detailed description of the main components of the National Destination Assurance Programme and its expected outcomes and impact are provided.



1. Vision & Goals

A. Vision

Vision:

Destination Jamaica meets and exceeds visitor expectations seamlessly through the total chain of experiences—from arrival to departure.

Purpose:

Destination assurance will help to create safe and appealing local destinations and ensure consistent delivery of quality tourism products and services to visitors and residents.

Aims:

Increase compliance among tourism enterprises; instil continuous improvement in tourism enterprises; and improve management of local destinations.

Expected Results:

Destination Jamaica will remain a world-class tourism destination with more visitors returning to the destination and enthusiastically recommending it to others as a result of their satisfaction with the seamless, authentic experience and assurance of a safe, secure, and sustainable stay.



B. Goals

The DAFS will be guided by four main goals that respond to priority issues identified from the comprehensive situation analysis. The priority issues were validated by stakeholders as part of the participatory planning process. Table 18 outlines main issues and corresponding goals.

Table 18: Goals of the Destination Assurance Framework and Strategy

ISSUE	GOAL
Complex licensing system requiring time and costs	**1.** Streamline the tourism licensing system.
No focus on continuous improvement of enterprises	**2.** Create a Destination Assurance Certification Programme that builds on the existing compliance framework for tourism enterprises.
Tourism-enterprise-level visitor satisfaction areas of concern, including visitor safety and security	
Gaps in tourism enterprise standards including lack of resilience and holistic sustainability planning at the tourism enterprise level	
Lack of destination stewardship guidelines for Destination Assurance Councils	**3.** Establish permanent, regional management of destination assurance.
Destination-level visitor satisfaction areas of concern, including visitor safety and security	
Lack of resilience and holistic sustainability planning at the tourism destination level	
Fragmented coordination and lack of automated system	**4.** Enhance shared management and monitoring of destination assurance.

Source: The World Bank Group, 2018

2. Framework & Strategy

The overarching purpose of the DAFS is to establish a fully operational programme, i.e. the National Destination Assurance Programme, that aims to increase compliance among tourism enterprises, instill continuous improvement in tourism enterprises, and improve management of local destinations. TPDCo will lead the development, management and monitoring of all key components of the National Destination Assurance Programme. TPDCo will need to work in close concert with key MDA's, enterprises, trade associations, and DACs.

The tenets of destination assurance have the greatest opportunity to be fully realised with stronger intragovernmental partnerships among MDAs and new public-private partnerships between TPDCo, trade associations and DACs. Automation is another critical factor for success coupled with robust systems for coordination, management and monitoring.

A. Overview of Framework

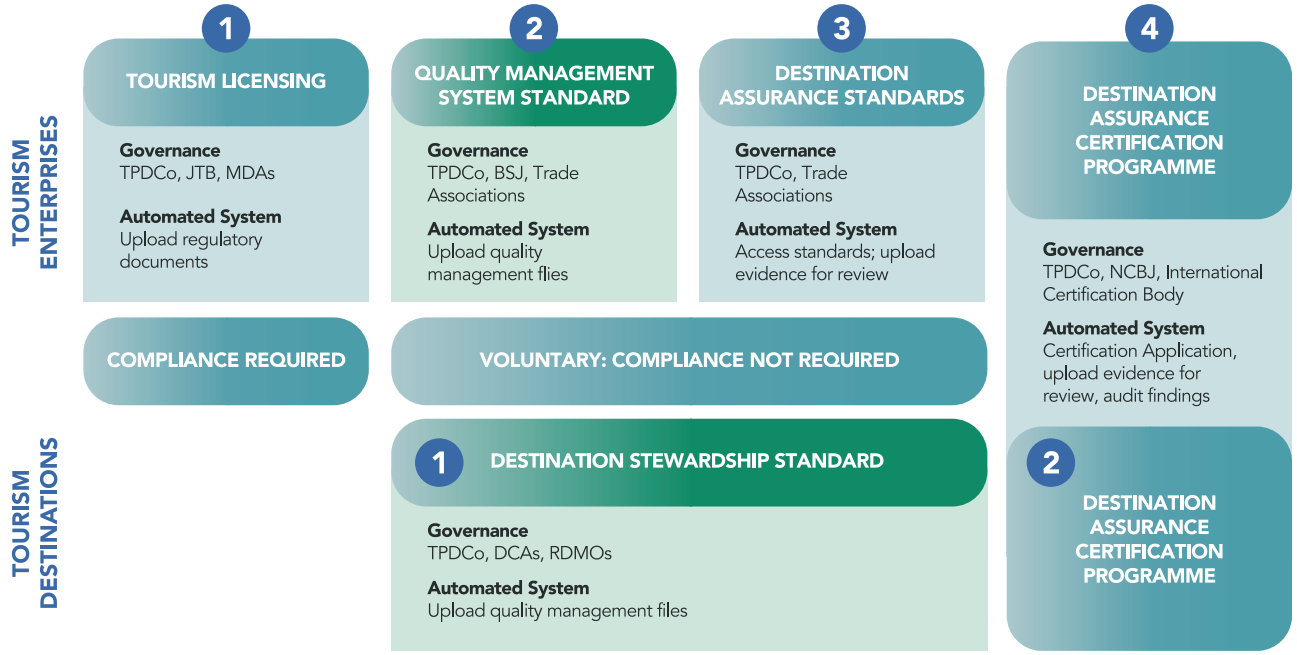
As seen in Figure 21, Jamaica's National Destination Assurance Programme encompasses tourism enterprises and local destinations.

The tourism enterprise track consists of four main components. The first component aims to put in place an integrated (unified) compliance conformity assessment process for on-site inspections. The second and third components will introduce quality and sustainability standards to instil a culture of continuous improvement in tourism enterprises. The fourth component involves development of a certification programme that will verify the status of tourism enterprises' performance in meeting quality and sustainability standards.

The local destination track consists of two main components. The first component will introduce internationally recognised standards for destination stewardship that will help to improve destination management. The second component involves expanding the certification programme for enterprises to include verification of local destinations' performance against the destination stewardship standard. The certification programme can be managed internally (i.e. by a local entity) or externally through partnerships with existing international certification programmes.

While the licensing component is not tiered since it consists of a series of central health and safety requirements, the proposed Destination Assurance Certification Programme should include voluntary standards that consider the different realities and resources relevant to micro, small, medium and large tourism enterprises.

Figure 21: Overview of Jamaica's National Destination Assurance Programme for Tourism Enterprises and Destinations



B. Overview of Strategy

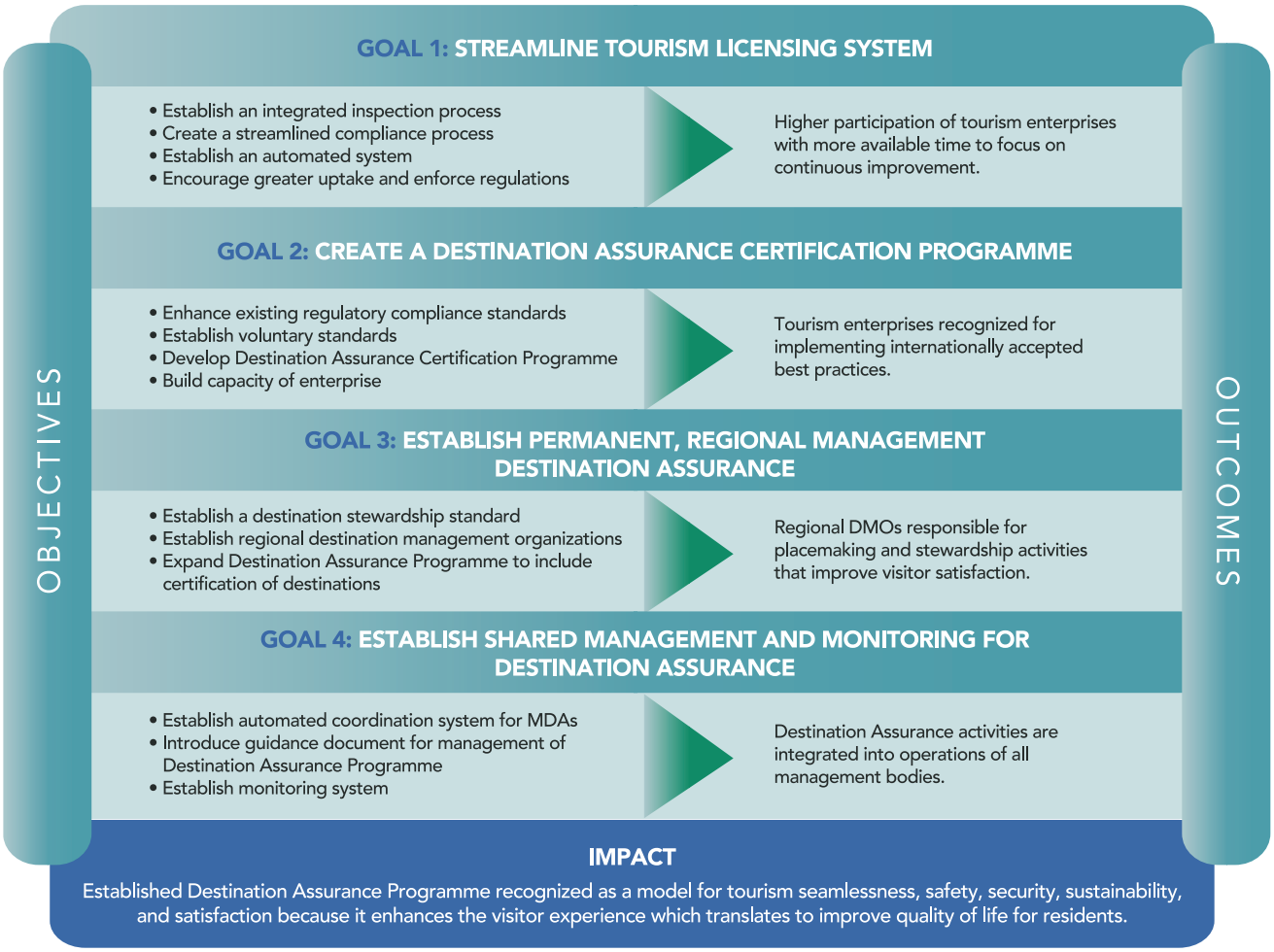
An overview of the recommended strategy for developing and implementing the National Destination Assurance Programme is summarized in Table 20. A full description of the objectives, implementation strategies and priority actions are included in Chapter 3: Strategy.

Table 19: Overview of Goals and Key Expected Outcomes

GOALS	OBJECTIVES	PRIORITY ACTIONS
1. Streamline the tourism licensing system	**1.1** Establish an integrated inspection process and cadre of inspectors.	**1.1.1:** Form centralized and integrated cadre of inspectors. **1.1.2:** Revise licensing process to accommodate the integrated inspectors.
	1.2 Synchronize periods of validity of certificates/permits which require inspections.	**1.2.1:** Evaluate and harmonize the time horizon of licences and permits.
	1.3 Establish an automated system that will improve efficiencies.	**1.3.1:** Put in place an automated system for enterprises to upload operational compliance documents. **1.3.2:** Automate document gathering process. **1.3.3:** Automate field inspection process and reports.
	1.4 Encourage widespread compliance and consistent enforcement.	**1.4.1:** Promote tourism licensing improvements and encourage compliance. **1.4.2:** Ensure that the licensing programme has effective enforcement of compliance and quality requirements. **14.3:** Ensure the licensing programme addresses systemic issues associated with enforcement of compliance and quality standards.
2. Create a Destination Assurance Certification Programme that builds on the existing compliance framework for tourism enterprises	**2.1** Enhance all existing regulatory requirements for tourism enterprises.	**2.1.1:** Update regulatory compliance requirements for tourism licensing.
	2.2 Establish voluntary standards for developing a quality management system.	**2.2.1:** Establish a quality management standard for tourism enterprises.
	2.3 Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern.	**2.3.1:** Establish internationally recognised standards that focus on sustainable tourism best practices.
	2.4 Establish voluntary standards for product development.	**2.4.1:** Establish product development standards that address authentic and high-quality experiences and products.
	2.5 Develop Destination Assurance Certification Programme.	**2.5.1:** Establish a Destination Assurance Certification Programme Scheme.
	2.6 Build capacity of enterprises to adopt quality, sustainability and product development standards.	**2.6.1:** Provide online training that supports adoption of new standards. **2.6.2:** Raise awareness of locals and visitors about health, safety and security best practices.

GOALS	OBJECTIVES	PRIORITY ACTIONS
3. Establish permanent, regional management of destination assurance	**3.1** Establish a destination stewardship standard.	**3.1.1:** Develop national destination stewardship standard.
	3.2 Establish regional destination management organisations.	**3.2.1:** Institutional strengthening of Destination Assurance Councils. **3.2.2:** Establish regional destination management organisations.
	3.3 Expand the National Destination Assurance Programme to include certification of local destinations.	**3.3.1:** Develop Destination Stewardship Toolkit and Technical Assistance Programme. **3.3.2:** Establish a destination certification system. **3.3.3:** Promote widespread adoption of destination standard.
4. Enhance shared management and monitoring of destination assurance	**4.1** Establish automated coordination systems and build capacity of MDAs for shared management and monitoring.	**4.1.1:** Introduce an automated system for managing and monitoring destination assurance.
	4.2 Introduce a guidance document for the management of the National Destination Assurance Programme.	**4.2.1:** Define programmatic governance and operational management for Destination Assurance. **4.2.2:** Establish mechanism for improved coordination and collaboration among co-managers and partners.
	4.3 Establish a monitoring system that will facilitate continuous improvement.	**4.3.1:** Develop a national level monitoring system for collecting visitor satisfaction from enterprises. **4.3.2:** Develop a national level monitoring system for climate change.

Figure 22: Overview of Expected Outcomes of Jamaica's National Destination Assurance Programme for Tourism Enterprises and Destinations





CHAPTER 3

STRATEGY

This chapter details the proposed strategy for achieving goals. It explains objectives, recommended implementation strategies and priority actions for each of the four main goals. A work plan which includes timeline, partners and resources needed for implementation of priority actions is also presented. The resources proposed are informed by associated cost estimates for the 2020–2021 fiscal year, by research on similar initiatives, and by interviews with individuals knowledgeable about cost requirements for all outputs. MDAs should use the cost estimates provided as a guide to be refined and updated through further research.

1. Streamline Tourism Licensing System

20: Streamline Tourism Licensing System - Goals and Objectives Table

GOALS	OBJECTIVES
1. STREAMLINE THE TOURISM LICENSING SYSTEM	1.1 Establish an integrated inspection process and cadre of inspectors. 1.2 Synchronize duration of tourism licences and certificates/permits that require inspections. 1.3 Automate the application and data management system. 1.4 Encourage widespread compliance and consistent enforcement.

GOAL 1 INDICATORS

1a. Percentage of enterprises that are licensed (overall, by sector)

1b. Percentage of enterprises that are lin compliance (overall, by sector)

1c. Percentage of enterprises with access to the automated platform

1d. Number of inspectors dedicated to compliance licensing and COVID certification

1e. Number of required inspections per year required for JTB licence (by sector)

1f. Estimated time period of application process to obtain/renew JTB licence (by sector)

A. Introduction

The licensing process for tourism enterprises involves a wide range of regulatory requirements that are enforced by many MDAs. The main purpose of the licensing system is to ensure that tourism enterprises are meeting basic requirements for health, safety and security. While the overall rate of compliance has improved steadily in recent years, it remains low (about 70% of tourism enterprises were licensed and 43% were compliant in 2019).

Destination Jamaica has several tourism subsectors: accommodations, transportation, tours, attractions, travel halts/rest stops, places of interest, craft, water sports, travel agencies and in-bonds (duty-free shops). The basic requirements for almost all of these subsectors are the same: business registration, tax certificates, permission to occupy property, public liability insurance and COVID-19 certification. In addition, specific subsector requirements include maritime safety certificates for the water sports subsector and public health certificates for tourism enterprises, such as accommodations and attractions, that may operate swimming pools and restaurants.

Each requirement is managed by a different MDA using its specific application process and associated costs, timelines and requirements, which often include on-site inspections. The great variability in the resources available to individual MDAs affects how quickly they can respond to inquiries, conduct inspections and resolve issues. Furthermore, due to the varying expiration dates of certificates/licences and the lack of communication and coordination between MDAs, delays in one step of the process due to inadequate numbers of inspectors or malfunctioning equipment can lead to the expiration of other certificates before TPDCo can assess the application.

The tourism licensing process is complex, and therefore presents considerable operational challenges for tourism enterprises. Tourism enterprises are often caught in a cycle of constantly working to obtain and renew the necessary certificates and licences. These enterprises also incur costs in terms of fees and time; for small tourism enterprises, these costs are significant. While many of the large enterprises have employees who are dedicated to ensuring that certificates and licences are up-to-date, small enterprises often struggle to remain compliant due to limited staffing.

Another factor that further complicates the tourism licensing system is the variability in licence renewal periods across the subsectors. Coupled with inconsistent enforcement, this variability has created an uneven business climate for licensed and unlicensed enterprises, and unlicensed tourism enterprises can operate successfully without ramifications.

To address these issues, the DAFS aims to streamline the tourism licensing system by:

- Creating an integrated inspection process and cadre of inspectors
- Synchronizing duration of licences, certificates, and permits which require inspections
- Establishing an automated system that will improve efficiencies
- Encouraging greater uptake in the licensing programme and enforce technical regulations to advance continuous improvement

Licensing is pass/fail applicable to all enterprises (small, medium and large). It cannot be a tiered system since all the requirements are critical. Making the licensing system more efficient as recommended will alleviate the general concerns that small enterprises have about licensing and expectations associated with requirements.

The main strategies and priority actions for achieving these objectives are outlined below. The objectives and strategies are focused on achieving a more efficient, less costly and reliably user-friendly licensing process that will increase licensing and compliance rates.

B. Objectives

Objective 1.1

Establish an integrated inspection process and cadre of inspectors

There is an urgent need to improve the on-site inspection process. Some of the regulatory requirements that tourism enterprises must complete to obtain a tourism operating licence include permits/certificates which are granted by relevant MDAs after completion of a conformity assessment that includes an on-site inspection. The inspections are a consistent bottleneck and are often delayed due to the variability of MDA resources, an inefficient paper-based system and lack of coordination among MDAs.

The following list explains the inspections required for licensing in each tourism subsector:

- Hotels, Apartments, Villas, Guesthouses. Between two to four inspections are required for a Public Health Food Certificate if operating a food establishment. Some businesses also require a swimming pool permit from the Ministry of Health via Regional Health Authorities; a Fire Certificate from the Jamaica Fire Brigade; a Beach Licence from NEPA; and security approval from the resort area division of the JCF.

- Homestay. Two inspections may be required—one for a Fire Certificate from the Jamaica Fire Brigade; one for security approval from the resort area division of the JCF.

- Tour Operators. Three inspections may be required: one for a Public Health Food Certificate (if operating a food establishment); one for approval for location in an environmentally sensitive area from NEPA; and one for security approval from the resort area division of the JCF.

- Attractions. Attractions may require up to eight inspections for various licences and permits: a Public Health Food Certificate (if operating a food establishment); a swimming pool permit from the Ministry of Health via Regional Health Authorities; a Beach Licence; approval for location in an environmentally sensitive area; written approval for exemption from the Wildlife Protection Act from NEPA; security approval from the resort area division of the JCF; ; a Spirits Licence (where applicable, as determined by JCF); and a Safety Certificate from the Maritime Authority of Jamaica.

- Water sports. At most, two inspections are required, for a Beach Licence from NEPA and a Safety Certificate from the Maritime Authority of Jamaica.

- **Travel Halts (Rest Stops).** Five inspections may be required for a Public Health Food Certificate (if operating a food establishment); a Fire Certificate from the Jamaica Fire Brigade; a Beach Licence from NEPA; security approval from the resort area division of the JCF; and a Spirits Licence (where applicable, as determined by JCF).

- **Places of Interest/Worship.** Up to five inspections may be required for: a Public Health Food Certificate (if operating a food establishment); a Fire Certificate from the Jamaica Fire Brigade; approval for location in an environmentally sensitive area; written approval for exemption from the Wild Life Protection Act from NEPA; and security approval from resort area division of the JCF.

A proposed solution to these challenges is to create an integrated on-site inspection process in which audits are conducted by all relevant MDAs—such as public health, fire and safety—at the same time. An integrated cadre of inspectors should also be established. Staff from MDAs can be seconded through administrative arrangements made between TPDCo and relevant MDAs. Although technical inspectors will be trained by the MDAs, TPDCo will cover the personnel costs associated with secondment and all inspections performed.

Inspections will be scheduled online and checklists of the regulatory requirements will be available for download through a web-based licensing application management system so that tourism enterprises can prepare for and monitor the status of their licensing applications. Inspectors will complete the audit report in real time and trigger a request for final approval or notification of further regulatory action required. Once MDAs provide final approval, TPDCo will then issue the licence.

Objective 1.2

Synchronize duration of tourism licences, certificates, and permits which require inspections

The existing tourism licensing system requires that tourism enterprises provide certificates/permits from several MDAs to prove that health, safety and other requirements are met. When there are delays in issuing certificates/permits due to poorly timed inspections and other resource constraints, tourism enterprises are often unable to complete the TPDCo licensing process in a timely manner. TPDCo is mitigating these bottlenecks by granting tourism licences based on acceptable proof of delays from MDAs. Despite these accommodations, tourism enterprises attempting to maintain compliance are significantly impacted by these bottlenecks.

Syncing the expiration dates of certificates and permits awarded by MDAs with the overall renewal licensing time frame for each subsector will eliminate unnecessary costs and inefficiencies. This, combined with an integrated inspection process, would mean enterprises could reasonably expect to complete the tourism licensing process at the same time in a given year. These changes will improve the overall efficiency of the tourism licensing system and encourage more tourism enterprises to maintain compliance.

Currently, the duration of the tourism licences varies considerably across subsectors. For instance, enterprises in the accommodations subsector (with the exception of homestays) are granted no-cost, perpetual operating licences while tour and water sports operators are granted one-year licences with renewal fees. This means that tour operators and water sports providers have to spend much more time and money to meet licensing requirements than accommodation providers. This uneven treatment of subsectors is being addressed in proposed amendments of the JTB Act currently under review. These amendments will change the duration of a tourism licence for the accommodations subsector to 15 years; tourism attractions to five years; and travel halts, water sports operators, tour operators, car rental operators and bike rental operators to two years. It may be necessary to further harmonize the duration of tourism licences across subsectors in order to incentivise continuous improvement. Those tourism enterprises that adopt quality and sustainability standards could enjoy a longer tourism license.

Objective 1.3

Establish an automated system that will improve efficiencies

The tourism licensing system compels enterprises to provide supporting documentation that confirms they have met all requirements; for example, proof of business registration, work permits, a lease/permit to occupy premises, a certificate of good standing, tax registration number and tax compliance certificates. Both the licensing process and management of the application and supporting documentation are paper-based, which is very inefficient. Significant improvements would be expected from transitioning the existing paper-based system to a web-based application management system, similar to NEPA's AMANDA, that allows applicants to track the status and progress of their applications.

The web-based tourism licensing application system would establish an enterprise database which contains contact information for relevant stakeholders, application status, and any regulatory flags, approvals or corrective actions. In addition, the system would allow users and MDA representatives to upload and manage documents, and let MDAs share compliance permits and other regulatory documents. Other important features include workflow definition and management for the steps in the application process, and access by multiple users and executive management so dashboards can be viewed and multiple MDAs can sign off on various steps of the application process.

The automated system would serve as a central repository for all regulatory compliance documents. This would eliminate the need for enterprises to physically visit multiple offices to collect hard copies to submit to TPDCo, and would allow MDAs to coordinate efforts while reducing delays. Additionally, the automated system would allow TPDCo to confirm that the necessary documents are in place prior to any inspection and free up the inspectors' time to focus on items which directly impact safety, security and quality. The system would also provide monitoring and evaluation functions.

The streamlining and automation of the tourism licensing process will translate into reduced effort and costs for tourism enterprises. Enterprises will therefore be able to redirect their focus and efforts to continuous improvement of their operations. This critical first step will enable Jamaica to expand its National Destination Assurance Programme by fostering the voluntary quality and sustainability standards detailed in Section II: Destination Assurance Certification Programme. This expansion will also assist enterprises with business development and specialized training to improve the quality of services and facilities and sustainability of operations.

Objective 1.4

Encourage greater uptake in the licensing programme and enforce technical regulations to advance continuous improvement

According to TPDCo's estimates, about 30% of tourism enterprises were unlicensed in 2019—most of them small enterprises. Some of the factors influencing low uptake of the licensing programme include licensing costs (in terms of time and money), low enforcement of technical regulations and a lack of awareness of the benefits of licensing. Even when enterprises are licensed, the lack of focus on continuous improvement negatively impacts the quality of the tourism product.

Compliance rates could be increased through awareness campaigns that educate tourism enterprises about the importance of licensing and its possible benefits, such as import concessions and access to government grants and loans. In addition, the awareness campaign should include meetings with smaller enterprise operators to explain the importance of continuous improvement and how TPDCo monitoring can assist them in applying best practices. Through efforts like these, continuous improvement can become a widespread, permanent practice in Jamaica's tourism sector. During interviews, some smaller enterprises expressed the need for a tiered licensing system. However for many of the MDAs, the licensing system is characterized by minimum standards that apply to all tourism enterprises. As a result, in addition to the compliance awareness campaign, we recommend business advisors within TPDCo provide smaller enterprises targeted support in meeting requirements.

Improving enforcement will give enterprises fewer opportunities to operate successfully without a licence. Improved enforcement can be achieved by using the online licensing platform to automatically send reminders to tourism enterprises when permits/certificates are nearing their expiration date and when inspections are scheduled, so enterprises can be fully prepared. The automated licensing system can also be used for self-regulated monitoring, where enterprises voluntarily report their progress to TPDCo on an ongoing basis. Evaluating and adjusting fines and penalties to ensure they serve as effective deterrents can further increase incentives to obtain licences and comply with regulations.

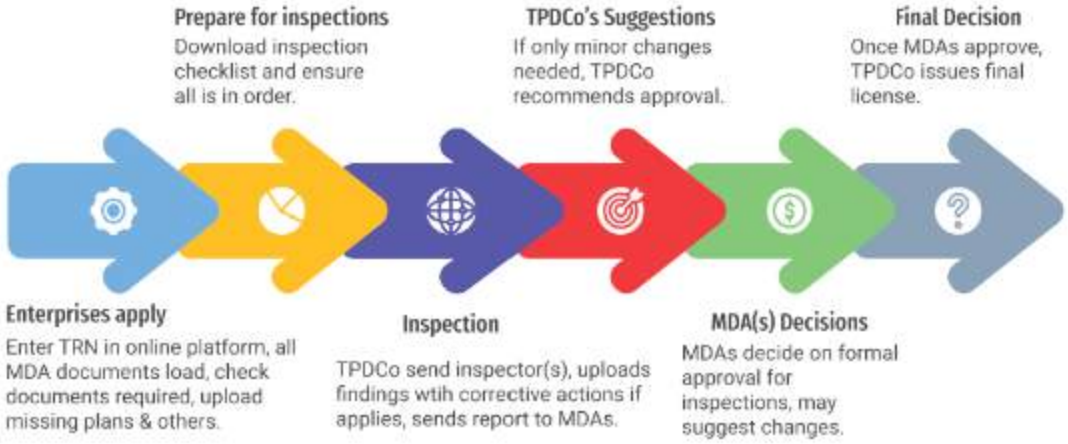
1. Unifying Resources across MDAs

To reduce the delays in the licensing application process due to inspections (as stated in Objective 1.2), TPDCo should consider the creation of a harmonized inspection process. In this process, all inspections would be scheduled electronically, and all the main inspections would be conducted at the same time using an integrated team of inspectors with electronic checklists that automatically generate inspection reports. The integrated cadre of inspectors should include technical and quality inspectors. Technical inspectors will be seconded to TPDCo by MDAs, such as the Public Health Authorities and the Jamaica Fire Brigade, that have been trained to conduct health, safety and quality inspections by those MDAs. Quality inspectors will be employed and trained by TPDCo to perform quality audits nationwide to assist enterprises with continuous improvement.

2. Automating Tourism Licensing Process

The paper-based licensing system should be transitioned to a web-based platform that facilitates online application, inspection, and monitoring. Figure 23 outlines the proposed automated tourism licensing process. TPDCo is currently assessing viable automation options. The DAFS outlines additional considerations and new requirements for the automated system that will support effective management of destination assurance.

Figure 23: Proposed Automated Tourism Licensing Process





Objective 1.1

Improve the inspection process and establish an integrated cadre of inspectors

Priority Action 1.1.1: Form centralized and integrated cadre of inspectors.

- Establish a cadre of TPDCo Auditors composed of inspectors from other MDAs, through secondment or other administrative arrangements, who are paid by TPDCo to conduct integrated inspections across subsectors—food handling, fire, safe operation of swimming pools, security. MOT should lead this process, as a policy change is needed to ensure its effectiveness. Note that the Ministry of Labour and Social Security has already expressed support for capacity building in this area through the availability of a cadre of skilled and trained personnel to support the tourism industry. For some MDAs, the number of inspectors may already be too limited to fully accommodate the secondment arrangements. In this case, an alternative is to engage the services of retired inspectors to recruit and train recent university graduates through agreements with the MDAs. In other cases where an inspection is linked to a wider application management process guided by prescribed categories under the law, further consultation between the MDA and TPDCo is needed to determine how integrated inspections could be conducted.

- Define the responsibilities of technical and quality inspectors. Technical inspectors will include employees from MDAs who are seconded to TPDCo to form part of the integrated cadre of inspectors who will conduct on-site inspections (e.g., health services, fire). The quality inspectors will conduct audits associated with the new quality and sustainability standards for tourism enterprises. Both types of inspectors will work at the national level for TPDCo and conduct inspections islandwide.

- During the planning stages, MOT and TPDCo should discuss and develop guidelines with each MDA on how seconded inspectors can function as members of the integrated inspection team while maintaining their independence and conducting high-quality inspections without significantly impacting the MDA's role as specified by legislation and governing protocols.

- Technical inspectors will be trained to conduct inspections by their respective MDAs according to the MDA's internal protocols. Quality inspectors will be trained by TPDCo to assess the performance of tourism enterprises against voluntary quality, resilience and sustainability standards detailed in Chapter 3, Section II: Destination Assurance Certification Programme. In developing training programmes for quality inspectors, TPDCo could consider utilizing its COVID Certification training programme as a baseline for more specialized requirements for regulatory compliance, and for quality and sustainability audits. Also, TPDCo could conduct cross-training on the inspection process for existing employees, where possible, to ensure adequate numbers of inspectors at all times. For cost-effective roll out, partnership with JCTI for asynchronous training is suggested. To ensure that the functions of the technical inspectors are not compromised by the functions of the quality inspectors, TPDCo should also consider implementing a firewall between compliance and quality inspectors.

- Some enterprises may be reluctant to use the advisory services of TPDCo because they may be concerned that the auditors will focus on finding compliance faults rather than on providing technical assistance for continuous improvement. Therefore, TPDCo should consider identifying a list of approved external business development advisors that can counsel tourism enterprises, with special attention being paid to supporting micro and small enterprises through the licensing process. Furthermore, TPDCo should consider expanding its auditing capacity to include the Craft Policy and/or product development and authenticity standards.

Table 21: Priority Action 1.1.1: Form centralized and integrated cadre of inspectors

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Negotiated tripartite secondment arrangements: J$24 million / US$160,000 per annum Ground transportation/Mileage for inspections: J$10 million / US$67,000 Additional office space, equipment and cross-training: J$6 million / US$40,000	MOHW, JCF, JFB, NEPA

Priority Action 1.1.2: Revise licensing process to accommodate the integrated inspectors.

TPDCo's integrated cadre of technical inspectors will be able to perform on-site inspections as soon as a tourism enterprise's supporting documents have been uploaded to the web-based application and data management platform. During the on-site inspections, technical inspectors will use an electronic checklist and be able to make relevant comments or notes in real time. An inspection report will be generated automatically in real time. The automated system will notify the relevant MDA approvers that their sign off is needed. Approvers at MDAs will then review the inspection report and either agree with the technical inspector's recommendations or engage in further regulatory actions. Once MDAs approve the issuance of the certificates/permits, JTB will be able to issue the tourism license.

TPDCo's inspection decisions should be guided by quality control measures. If an inspection results in no issues of non-conformance, then TPDCo should suggest approval of certificate/permit. However, if issues of non-conformance are found, technical inspectors can flag these in the inspection report and MDAs can suggest corrective actions. On resolution of the issues and MDA approval, the certificate/permit can be issued. Finally, if inspections occur and major issues of non-conformance are found, technical inspectors should raise the issues to the relevant MDA, which will mandate major corrective actions. The technical inspectors will confirm whether the corrective actions are completed. Once confirmed, the certificate/permit can be issued. Note that in the implementation stage, the revision of the licensing process to accommodate the integrated inspectors can be combined with Priority Action 1.1.1 to reduce the number of separate budget items.

Table 22: Priority Action 1.1.2: Revise licensing process to accommodate the integrated inspectors

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Workshop and cross-training costs: J$2.5 million / US$17,000	MOT (lead), MOHW, JCF, JFB, NEPA

Objective 1.2

Synchronize duration of tourism licences, certificates and permits which require inspections

Priority Action 1.2.1: Evaluate and harmonize the duration of licences, certificates and permits.

- Evaluate and modify the duration of tourism licences, especially perpetual licences and approval letters, as planned in the proposed amendments to the JTB Act currently under review. Further harmonization of the licensing renewal periods for all subsectors will enable greater efficiencies throughout the licensing process. Perpetual licences do not encourage continuous improvement, especially since many benefits associated with licensing, such as marketing via the JTB website, are linked to licensing and not compliance. It is recommended that MOT take the lead on this action because policy changes may be needed to ensure the effectiveness of the measure.

- Once the proposed licence duration amendments are completed, the existing licence renewal dates for each subsector will need to be updated. Every effort should be made to stagger the expiration dates for each subsector to avoid peak season and to take into account the number of expected applicants.

- To accommodate the integrated inspections process, MDAs will need to revise expiration dates for the certificates or permits they grant as part of the overall tourism licensing process. The new expiration dates should fit within the subsector-specific tourism licence renewal period. This ensures that all renewal activity for each subsector occurs at the same time. For example, the tourism licence for attractions expires on April 30th of each year. If the attraction operates a food establishment, a Public Health Food Establishment Certificate is required; however, this certificate, which requires an inspection, expires a year from issue. Thus, delays in obtaining the food establishment certificate mean that the enterprise will not be able to complete the licensing process on time. Under the new process, the food certificate should expire at the same time as other certificates, allowing the establishment to complete all licensing and inspections on the same schedule.

- Once renewal periods have been determined, use the automated system to schedule inspections and remind tourism enterprises of their licence renewal date. Each enterprise can then reasonably expect that their tourism licence will be renewed at the same time each year.

- Note that synchronization of expiration dates of certificates and permits could impact the revenue streams and staffing requirements of various MDAs. During the planning stages, consultations should be used to address any shortfalls in revenue and staffing. Additionally, the degree of cooperation among MDAs that is required to achieve synchronization and the streamlining of processes may require changes in legislation. This should also be considered during the planning stage.

Table 23: Priority Action 1.2.1: Evaluate and harmonize the time horizon of licences and permits

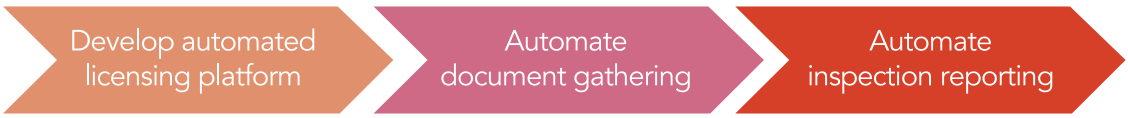
TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	Minimum administrative resources: J$1.5 million /US$10,000	MOT (lead), MOHW, JCF, JFB, NEPA

These resources will be directed at the process of reviewing periods of validity and instituting the necessary changes.

Objective 1.3

Establish an automated system that will improve efficiencies

Figure 24: Proposed Automated System



Priority Action 1.3.1: Establish an automated system for enterprises to upload operational compliance documents.

- Acquire an online platform which allows tourism enterprises to upload documents required for compliance and helps TPDCo schedule inspections and audits. MDAs can also upload permits and certificates, which would eliminate the need for enterprises to physically visit multiple offices to collect hard copies to submit to the TPDCo. This also facilitates centralized support for licensing and compliance.
    - Note that before the online platform is acquired and current processes are modified, there should be an early planning meeting between TPDCo and the JTB to discuss the system requirements and workflows.
- Modify the licensing process so enterprises can take advantage of the efficiency of the online platform. Once basic documents such as business registration and permission to occupy property are uploaded, tourism enterprises can focus on preparing for inspections.
- Develop an automated licensing application and inspection platform. This could be achieved through modification of the existing AMANDA platform used by NEPA and other MDAs, or it could be done using other available database platforms. The application and auditing platform should include:
    - Enterprise Database
        - Contact information
        - Application status
        - Flags, approvals, and corrective actions
    - Document Management System
        - Ability to upload and download documents
        - Ability to transfer compliance permits from MDA to Enterprise application
        - Ability to provide application forms and tables that can accommodate data entry from laptops, tablets, and mobile devices.

- Workflow Management
  - Ability to define sequential steps in the application process to provide logical movement through the platform.
  - Ability to provide "stop-go" notifications to all applicable users such as the enterprise, inspectors, and MDA managers.
- Multi-user Access
  - Ability to allow multiple users to access multiple applications and audits. For example, if an individual or company owns more than one business or service they could access all relevant applications. Similarly, a single auditor could access all applications assigned to them. Finally, all MDAs could access all applications.
  - Ability to allow MDA and programme managers to digitally sign off on completed applications.
- Comment sharing and flagging of workflow steps
- Flagging of required compliance documents and corrective actions
- Providing access to voluntary quality and sustainability standards

Figure 25: Using the TPDCo Tourism Licensing Platform

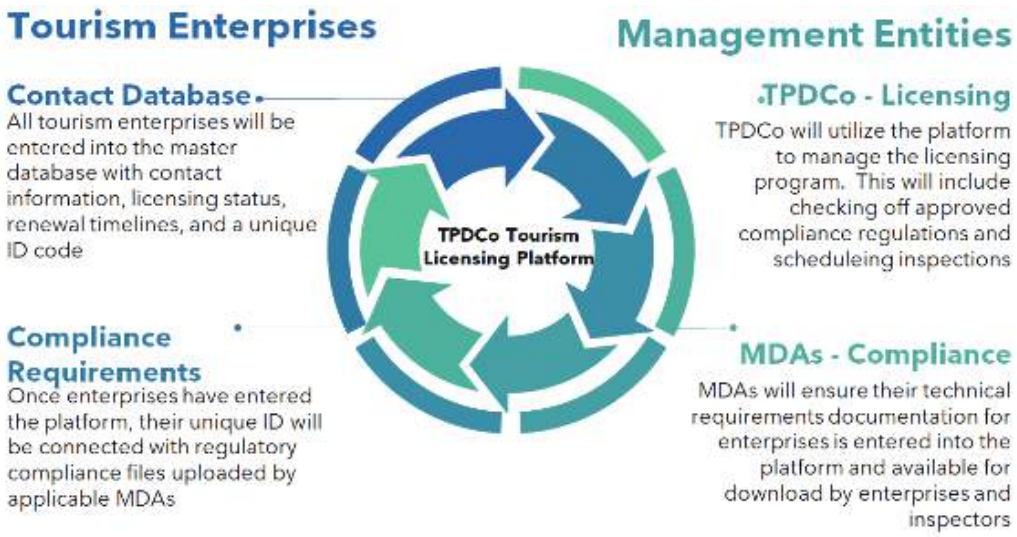


Table 24: Priority Action 1.3.1: Put in place an automated system for enterprises to upload operational compliance documents

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Procurement of a system similar to NEPA's AMANDA - software, hardware, high availability components and service support for 3 years: J$150 million / US$1 million Training: J$3 million /US$20,000 for training	JTB, MOHW, JCF, JFB, NEPA, E-Gov

Priority Action 1.3.2: Automate document gathering process

- Digitize all compliance-based documentation required by MDAs that are mandatory for the JTB Licence (e.g., business licence).
- Automate applications so they can be completed online and submitted electronically by tourism enterprises. Ensure application forms can also be scanned and uploaded manually if paper copies are received.
- Use database functionality to automatically categorize enterprises based on tags such as sector, parish, services, and number of employees.

Table 25: Priority Action 1.3.2: Automate document gathering process

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Cost presented in 1.3.1	JTB, MOHW, JCF, JFB, NEPA, E-Gov

Priority Action 1.3.3: Automate field inspection process and reports.

- Automate field inspection process through use of automated checklists.
- Automate the creation of inspection reports which combine the electronic inspection checklists and general notes taken in the field by inspectors. The inspection report is finalised and uploaded once all sign offs are received.

Table 26: Priority Action 1.3.3: Automate field inspection process and reports

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	On-site inspection equipment for inspectors: J$900,000 / US$6,000	JTB, MOHW, JCF, JFB, NEPA, E-Gov



Objective 1.4

Encourage widespread compliance and consistent enforcement

Priority Action 1.4.1: Promote tourism licensing improvements and encourage compliance.

Implement compliance awareness campaigns targeting tourism entities that emphasize the importance and benefits of licensing as well as the improvements to the licensing process that will increase focus on continuous improvement. Key partners which will assist TPDCo in this campaign include trade associations such as JHTA; MDAs responsible for aspects of licensing such as MOHW, NEPA, JFB, JCF, JHT, and MDAs in the communications space such as the Jamaica Information Service. However, MOT and JTB should take the lead on this because policy changes may be necessary to ensure the effectiveness.

- Create and deploy a media campaign to educate enterprises on the importance of licensing and its benefits: gaining access to funding, tax and financial incentives, and marketing advantages from being listed on the Jamaica Tourist Board's website. Also highlight the importance of continuous improvement to the success of tourism enterprises.
- Hold meetings specifically for small enterprise operators and explain the goals of TPDCo's monitoring process, and how TDPCo can help them become licensed and address challenges specific to their enterprises. Ensure adequate staff to follow up with small enterprises so that they remain encouraged throughout the process.
- Present best practices per sector. For example, based on experience, when should water sports operators begin applying for safety certificates for vessels, if applicable? What should be included in an application to gain approval from NEPA if operations are slated to take place in environmentally sensitive areas? What are the best ways to introduce quality improvements in service? TPDCo will be in charge of this aspect, based on the feedback of inspectors and other personnel involved in approving licensing applications.

Table 27: Priority Action 1.4.1: Promote tourism licensing improvements and encourage compliance

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	Meetings and workshops: $JA 3 million / US$20,000 Media campaign: $JA 10 million / US$ 66,666	MOT & JTB (Lead), SMTE's, JHTA, Destination Assurance MDA partners

Priority Action 1.4.2: Ensure that the licensing programme effectively enforces compliance and quality requirements.

- Since the automated system functions as a repository of all regulatory requirement files uploaded by MDAs and enterprises, TPDCo can more easily address gaps in compliance by monitoring the expiration of regulatory documents, permits and licences. Automated database systems can be coded to send reminders to an enterprise and any assigned inspectors when a licence is nearing expiration. This will eliminate the need for TPDCo staff to continuously monitor fragmented files to determine when a permit, certificate, or licence expires. It also allows enterprises time to gather necessary files for renewal.
- Embed a monitoring and reporting system into the licensing portal, based on the items in the checklists used for the in-depth inspections, which requires ongoing progress reporting to TPDCo. This self-regulating model will make enforcement more efficient. TPDCo will also be able to determine and provide support for business development and other needs. TPDCo will be assisted in this process by all MDAs responsible for any aspect of the licensing system, particularly those which require on-site inspections such as NEPA, JFB and MOHW. However, it is recommended that MOT and JTB take the lead on this action, as policy changes are needed to ensure effective enforcement.

Table 28: Priority Action 1.4.2: Ensure that the licensing programme has effective enforcement of compliance and quality requirements

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Costs presented in 1.3.1	MOT & JTB (Lead), SMTE's, JHTA, Destination Assurance MDA partners

Priority Action 1.4.3: Ensure the licensing programme addresses systemic issues associated with enforcement.

- Review and update the penalty scheme for non-compliance with agreed improvement plans where justified. Stakeholders consistently commented that penalties are too low and hence fail to serve as effective deterrents and substantially increase the cost of enforcement. Determine and uphold actionable consequences for non-conformance with compliance and quality standards. This will be undertaken on an ongoing basis in consultation with the sector and via the process currently underway at MOT for the revision of the JTB Act.
- Address systemic issues with the current compliance-based licensing programme by reducing complexity and streamlining the process through automation as previously discussed.
- Establish communication platforms that ensure appropriate messages are shared with all tourism enterprises as it relates to the enforcement of requirements. This could be done via the automated system, tourism associations and TPDCo's social media platforms. Focus on items which directly impact safety, security and quality. This will be directed by the communications personnel at MDAs involved with licensing, such as NEPA, JFB, MOHW, JCF and TPDCo. However, given that policy changes are needed to ensure that effective enforcement of compliance occurs, MOT and JTB should take the lead on this action.

Table 29: Priority Action 1.4.3: Ensure the licensing programme addresses systemic issues associated with enforcement of compliance

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	No aditional cost.	MOT and JTB (Lead), MDAs involved in compliance: NEPA, JFB, MOHW, JCF and TPDCo etc.

Priority Action 1.4.4: Consider retaining the current requirement that tourism enterprises obtain COVID-19 certification for travel authorization purposes as a part of the licensing process.

- Retain current COVID-19 certification as a requirement in order to increase compliance rates and maintain quality of service. Since COVID-19 certification has been a requirement for obtaining travel authorization, the number of non-compliant tourism enterprises has decreased. Further, the COVID-19 certification process provides additional opportunities for TPDCo to engage with tourism enterprises on ways to improve the quality of service.

Table 29: Priority Action 1.4.3: Ensure the licensing programme addresses systemic issues associated with enforcement of compliance

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	No aditional cost.	MOT and JTB (Lead), MOHW, and TPDCo.

2. Destination Assurance Certification Programme

Table 30: Destination Assurance Certification Programme - Goals and Objectives

GOALS	OBJECTIVES
2. CREATE A DESTINATION ASSURANCE CERTIFICATION PROGRAMME THAT BUILDS ON THE EXISTING COMPLIANCE FRAMEWORK FOR TOURISM ENTERPRISES	2.1 Enhance all existing regulatory requirements for tourism enterprises. 2.2 Establish voluntary standards for developing a quality management system. 2.3 Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern. 2.4 Establish voluntary standards for product development. 2.5 Develop Destination Assurance Certification Programme. 2.6 Build capacity of enterprises to adopt quality, sustainability and product development standards.

GOAL 2 INDICATORS

2a. Percentage of enterprises which have accessed the Quality Management System Standard & Training (overall, by sector)

2b. Percentage of enterprises which have accessed the Destination Assurance Standards & Training (overall, by sector)

2c. Percentage of enterprises which have accessed the Product Development Standards & Training (overall, by sector)

2d. Percentage of enterprises which have applied for certification (overall, by sector)

2e. Number of trainings, public awareness campaigns, and other engagement activities per year related to Destination Assurance

A. Introduction

The tenets of Destination Assurance cover a wide range of tourism issues, such as resilience, visitor satisfaction, safety, security, seamlessness, and sustainability. Much of the responsibility to ensure these principles are translated to the visitor experience will happen at the enterprise level throughout the tourism value chain. Currently, the only management control used to ensure Destination Assurance is the compliance-based licensing programme implemented by TPDCo. While this type of system can ensure all enterprises are meeting critical baseline regulatory obligations to operate and, to a lesser degree, minimal health and safety requirements, the current National Destination Assurance Programme is not fostering a culture of continuous improvement.

As seen from the global benchmarking of other national tourism assurance programmes (see Chapter 1, Section III: Review of Global Quality Assurance Systems, D. National Quality Assurance Programmes), quality management is central to national quality assurance programmes. For most programmes, such as England, South Africa and New Zealand, the primary objective is encouraging businesses to make quality assurance a central theme of their operations by adopting voluntary quality and sustainability standards.

Consistent quality delivery among all providers in the value chain in a destination is often achieved by conformance to criteria and standards and the convergence of mandatory requirements and self-regulation. The extent to which the standard may be mandatory or voluntary is often contingent on how critical the consequences of poor performance can be to the protection of guests.

Consistent standards have a variety of far-reaching benefits, both for the enterprise implementing the standards and for the enterprise's customers. These benefits include:

- Providing a framework for management action
- Providing performance evaluation metrics
- Providing a destination management tool
- Building awareness of sustainable tourism
- Creating cross-sector tourism cooperation that ensures seamlessness
- Encouraging communication, branding, and competitiveness

Improving compliance and building on the tourism licensing system creates an opportunity to instill a culture of continuous improvement in tourism enterprises through the adoption of quality and sustainability standards. To maximise their impact, standards should be used to develop a management system for direct operational planning, procedures, and performance measurements. The ISO is recognised as the go-to global resource for management system standards.

One way to maximise the use of standards is through certification. A certification programme is the transparent and credible process of having a set of standards and/or guidelines that have been implemented by an entity verified by an objective and qualified party to ensure a minimum threshold is met or surpassed. A tourism certification programme can therefore act as a quality assurance tool that gives customers confidence that an enterprise's facilities and services meet verified levels of quality and/or sustainability. Additionally, sustainability standards encompass far more than simply environmental best practices; they . They also cover sustainable business policy, workplace practices, supply chain management, resource use, and community impact. And while no specific standard exists to describe accepted best practices, the climate change and the coronavirus pandemic are forcing enterprises to integrate resilience into all aspects of their operations.

Certification also enables the tourism boards to organise and recommend properties and businesses by quality level, and gives businesses a motivation to upgrade and guidelines to do so.

The use of tourism standards and certification programmes has expanded in recent years. Historically, national tourism programmes have focused exclusively on quality standards for enterprises. These are typically national standards based on international guidelines. More recently, with the advancement of the GSTC-I and GSTC-D, a host of leading local organisations such as trade associations and municipalities are adopting and or adapting these standards to enhance sustainability of the tourism sector. In most cases, the standards are used to educate and encourage businesses and destinations to improve their operations through the implementation of a sustainability management system. However, in some cases certification programmes have been designed to verify implementation. In these situations, there are at least two approaches: internal or external certification.

Internal certification refers to a programme that is completely managed by a local entity such as a national certification body or similar MDA. Internal certification programmes are usually designed under the requirements of local regulations and accreditation protocols to ensure a cohesive fit with existing programmes and procedures. When the tourism board doesn't wish to take full responsibility for implementing a certification programme, an external certification option can enlist the services of an external certification body (such as a private company or nonprofit organisation) to conduct all verification and labelling procedures. There are only a few GSTC-Accredited certification bodies which have met the highest level of international protocols for conducting certification. These include EarthCheck (enterprises and destinations), Green Destinations (destinations), Travelife for Tour Operators (enterprise) and Vireo Sri (enterprises and destinations). There are numerous accredited certification programmes for ISO 9001, ISO 14001 and other similar ISO standards.

While enterprises clearly play an important role in Destination Assurance, other stakeholders that must participate include multiple MDAs, tourism workforce employees, youth, vendors, and visitors. Because the current focus is on compliance, Destination Jamaica needs a cultural shift that more strongly integrates continuous improvement into the fabric of Jamaica's tourism experience. This cultural shift will require significant investments in governance, operational systems, capacity building, and national initiatives to build awareness of the importance of continuous improvement in increasing visitor satisfaction and the sustainability of the sector.

The goal of evolving Jamaica's National Destination Assurance Programme to meet current and future industry needs involves the creation of a Destination Assurance Certification Programme that builds on the existing compliance framework for tourism enterprises. This will be achieved by:

- Enhancing all existing standards related to regulatory compliance for tourism enterprises;
- Establishing voluntary standards for quality, resilience, and sustainability;
- Developing a Destination Assurance Certification Programme for tourism enterprises; and
- Building the capacity of tourism enterprises to adopt quality, resilience, and sustainability standards.

The main objectives and strategies for achieving objectives and priority initiatives are outlined in this section.

B. Objectives

Objective 2.1

Enhance all existing regulatory requirements for tourism enterprises

Jamaica's current tourism licensing system is solely regulatory and compliance-oriented, and ensures that tourism enterprises have met minimum requirements to operate legally.

The existing requirements should be reviewed with a view to integrating new compliance requirements that focus on enterprises

- monitoring visitor satisfaction;
- conducting a risk and resilience assessment focused on environmental sustainability, natural disaster risk response, public health risk response, and climate change; and
- incorporating additional health, safety, and security considerations.

These new requirements should be mandatory to receive the JTB Tourism License. In addition they will inform resilience and adaptation planning approaches where outputs of the risk and resilience assessment identify actions that are mainstreamed into plans and applied by enterprises.

Objective 2.2

Establish voluntary standards for developing a quality management system

Continuous improvement in enterprises is a central tenet of destination assurance. This will require ongoing engagement with tourism enterprises to encourage them to adopt quality, resilience, and sustainability standards, thereby instilling a culture of excellence and motivating tourism enterprises to not just meet but exceed expectations.

Tourism enterprises can address these gaps in their operations by developing systems based on existing standards like ISO 9001. These quality management system standards will guide enterprises in the development of internal systems that can improve multiple aspects of operations. This commitment to quality management will strengthen the Jamaica brand, build confidence with visitors, enhance linkages with the local community, improve positive and mitigate negative social and environmental impacts, and encourage continuous improvement for enterprises to better support the tenets of destination assurance.

Objective 2.3

Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern

Multiple gaps have been identified in tourism enterprise standards such as environmental sustainability and risk management. Additionally, the holistic approach to planning and management with regard to resilience-building is an emerging theme and not currently accounted for in any enterprise standards.

In 2008, the GSTC established universally accepted standards for sustainable tourism enterprises. These standards guide users through the development of a sustainability management system and installment of best practices for operations. The GSTC-I provides a logical framework to accomplish this in the context of the DAFS.

Currently, resilience is primarily associated with environmental sustainability and disaster risk reduction in Jamaica, and the existing licensing system contains minor compliance requirements for environmental sustainability and disaster risk reduction for enterprises whose operations might have a negative impact on the environment, such as tour operators, attractions and water sports providers. However, these requirements don't address key substantive risks to the business and don't assume a broader meaning for resilience. Jamaica's

compliance standards should be expanded to include new requirements that minimise risks associated with climate change and situations like the coronavirus pandemic, such as the creation of resilience plans for identified risks. Comprehensive operating practices should be implemented to mitigate forecasted impacts of climate change such as reduced water supply and increased temperatures in public spaces and facilities. Potential measures include implementing more efficient water storage and distribution facilities, planting trees and constructing shade structures around properties and in public spaces as well as using renewable energy sources to reduce energy consumption and costs. The accommodations and tour operator subsectors, in particular, should be encouraged to provide low-carbon packages for environmentally conscious visitors; Bhutan provides good examples of this.

The current requirements also lack any provision for psychosocial support for tourism employees and visitors who experience adverse events. This element of disaster preparedness should be given special attention, especially in regard to rapid preliminary assessment of mental health needs after a disaster.

To ensure that enterprises are able to respond to disaster shocks and resume operations quickly, the list of voluntary standards should include emergency preparedness plans, including evacuation and crisis response plans for all categories of enterprises and communications systems to keep tourism workers and guests informed and provide direction. In addition, it is recommended that enterprises purchase peril and parametric insurance to provide a source of funds to recover from unexpected events such as fires, storms and floods. Also, some sector-specific requirements, such as measures to control GHG emissions in the accommodations, transportation and tour operator subsectors, could be added to the existing tourism licence requirements.

Objective 2.4
Establish voluntary standards for product development

In Jamaica's definition of destination assurance, seamlessness implies intent to ensure a visitor's experience moves smoothly from arrival to departure. The variability of experiences and products can impact a visitors' overall satisfaction. Therefore, to ensure the highest levels of satisfaction, each product in the tourism value chain (e.g., transportation, accommodation, tours, food & beverage) needs to provide the highest level of quality. Additionally, authenticity must be integrated in all aspects of the overall experience. To achieve this, product development standards should be established for package and non-packaged trips, experience-based products such as cultural heritage and nature-based tourism, and items sold in craft markets. To support these efforts, programmes and ongoing training on business development tools and COVID-compliant technologies should be offered.

Objective 2.5
Develop a Destination Assurance Certification Programme

Destinations often administer standards in order to create a reference point for tourism providers to assess and improve their performance in guest services, public health and environmental impacts. In some cases, organised verification and certification schemes exist to further the credibility of the standards' impact through objective, impartial, and transparent audits. Such a programme could be managed internally through the NCBJ and built on TPDCo's newly established COVID certification requirements or managed externally through a third-party certification body.

TPDCo has encouraged the adoption of voluntary international quality, resilience, and sustainability standards. Additionally, some tourism enterprises have obtained certification largely as a marketing strategy that appeals to visitors drawn to these kinds of best practices and strong corporate social responsibility approaches. Uptake of these standards has been limited. This misses an opportunity to ensure businesses are focused on the quality of their own operations as well as understanding their role in the full travel experience of the visitor.

To best encourage uptake of mandatory compliance standards and voluntary standards, a new Destination Assurance Certification Programme should be required for all tourism enterprises. This comprehensive three-component programme would require adherence to regulatory standards and recognise efforts by those implementing voluntary quality, resilience and sustainability practices with an incentive-based programme. The voluntary programme would accommodate the needs of different sizes of enterprises by adjusting implementation thresholds. This type of programme should encourage a culture of continuous improvement while having a beneficial impact on environmental, social and economic resources. NEPA has developed an ecolabel for the Green Business Jamaica Programme. Under this Programme, the environmental stewardship of businesses including those in the tourism sector, is recognized. An evaluation of this programme for potential areas of synergy could be undertaken as the Destination Assurance Certification Programme is developed.

Objective 2.6

Build capacity of enterprises to adopt quality, resilience, sustainability and product development standards

Visitor exit surveys have identified several recurring concerns that must be addressed. Concerns include outdated accommodations and unfriendly staff (see Chapter 1, Section V: Visitor Satisfaction for details). One of the most reported issues was harassment outside of cruise ports, attractions and other tourism enterprises, where visitors are pressured to buy legal and illegal goods or services. Additionally, visitors were dissatisfied with some of the safety and organisational aspects of some of the water sports attractions. Finally, cruise visitors report that there is a lack of variety in shopping options and items, as visitors find the same product and entertainment offerings everywhere.

To ensure that visitor experiences throughout the tourism value chain are rated as good at a minimum, destination assurance programmes must demand that the destination and enterprises emphasize an ethos of continuous improvement. As Jamaica competes as a destination in an era of pandemic, climate change and other realities that impact traveller choices, offerings must consistently be at such a high standard that Jamaica remains top of mind and a place worth the travel risk and contribution to carbon emissions as a vacation choice, both locally and internationally.

Stakeholders consulted for development of the DAFS reported that members of the poor and informal communities surrounding local destinations often contribute to environmental degradation of the area. Therefore, an effort needs to be made to encourage a change of behaviours among vulnerable communities to protect the natural environment. Tourism enterprises can help to promote public awareness and education.

Remaining competitive requires that Jamaica's National Destination Assurance Programme include more than the current largely compliance-based tourism licensing system. The programme will need to be expanded to include voluntary adoption of quality, resilience and sustainability best practices and standards.

Furthermore, a capacity-building programme is needed to support the widespread adoption of the new standards, with particular emphasis on modules that introduce best practices addressing the recurring areas of visitor concerns. The capacity-building modules should also extend beyond the operating practices of tourism enterprises to include direct engagement with employees, youth, vendors, and visitors. Training modules for new requirements associated with disaster risk management, holistic environmental management and climate change should also be considered. Enhancing disaster resilience capacity of enterprises will reduce the impact of disasters, and emergency response professionals will be able to perform critical tasks more effectively when stakeholders are aware of disaster protocols. These capacities will also ensure the sector is able to recover from disasters faster and more efficiently.



C. Strategies

1. Introducing Quality, Resilience, and Sustainability Standards

To achieve the stated objectives for Goal 2, there is a need to revise existing tourism licensing requirements to compel specific improvements in quality, health, safety, security, environmental management, disaster risk management and climate change mitigation and adaptation. Additionally, the BSJ should develop or direct development of new voluntary standards and guidelines for quality management, resilience, and sustainability. The development of a national standard to address all pillars and tenets of Destination Assurance is a viable solution.

2. Strengthening Service Delivery through Certification

A certification programme should be developed and implemented to foster a culture of continuous improvement among tourism enterprises. The accredited certification programme would support adoption of the quality, resilience, and sustainability standards, verify the performance of tourism enterprises against the standard, and assure visitors of the adherence of standards. The certification programme will need to be developed through a participatory process that includes a diverse group of stakeholders.

3. Capacity Building and Public Education

To achieve the stated objectives for Goal 2, numerous capacity-building interventions will be needed, such as training for enterprises on mandatory and voluntary standards, a series of training programmes related to a new certification programme, and capacity building for tourism employees, youth, vendors and visitors as well as a general public education and awareness strategy.

D. Priority Actions

Objective 2.1

Enhance all existing regulatory and administrative requirements for tourism enterprises

Priority Action 2.1.1: Update regulatory and administrative compliance requirements for tourism licensing.

Existing compliance-based regulatory and administrative requirements need to be expanded to include visitor satisfaction monitoring and planning for mitigation of environmental, health, safety, and security threats for all sectors. Documentation and inspection requirements for these new requirements will need to be structured efficiently to reduce complexity and redundancy.

1. New Requirements: Review existing regulatory and administrative compliance standards, specifically the non-technical regulations such as the TPDCo Checklist, and establish standards within the compliance programme which encourage or require enterprises to install an enterprise-level visitor satisfaction survey system. The standards and system would mandate the use of a survey collection tool, reporting of results to JTB/TPDCo, and tracking of issues as they arise and are resolved.

2. New Requirements: Review existing regulatory and administrative compliance standards and determine how to better incorporate environmental sustainability, climate risk management, and disaster risk management for the various subsectors while taking the business sector, scope of operations, and size of operations into consideration.
    a. Require enterprises to complete a sector-specific (e.g., water sports) and/or location-specific (e.g., beachfront) Risk & Resilience Assessment covering critical areas such as natural disaster response, public health risk response, climate impacts, and environmental threats.
    b. Tourism enterprises should be required to prepare emergency response and preparedness plans (commensurate to the scale of their operation) that include, at a minimum, leadership commitment, communication contacts and protocols, assigning roles and responsibilities for procedures, emergency procedures, staff orientation and training resources.

c. Resorts should establish a multi-hazard disaster plan covering fires, hurricanes, earthquakes and, for those close to the coast, tsunamis and coastal flooding.
d. Certain subsectors such as tour operators, attractions and accommodations which utilize or are located in sensitive natural areas should be required to implement additional compliance requirements where their operations have specific impacts on the environment or climate.
e. The transportation sector should be required to maintain particular standards for emissions from vehicles that contribute to global warming.

3. Incentives: Promote tiered financial incentives (e.g., tax breaks, subsidies) to compliant enterprises who meet and/or surpass standards to encourage participation.

Table 31: Priority Action 2.1.1: Update regulatory compliance requirements for tourism licensing

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	Consultancy for regulatory review: J$ 3 million / US$20,000	MOT, JTB, TPDCo, NEPA, ODPEM, Ministry of Economic Growth and Job Creation

Objective 2.2

Establish voluntary standards for developing a quality management system

Priority Action 2.2.1: Establish a quality management standard for tourism enterprises.

Establish universal baseline quality management standards for tourism enterprises, focusing on destination assurance tenets and emphasizing continuous improvement.

- Coordinate with BSJ to adopt quality management system standards, following the format of ISO standards like ISO 9001. Standards should describe prescriptive and process guidelines for developing quality assurance policies and plans.
    - The current national requirements for COVID compliance certification could serve as a foundation for documentation requirements. Currently, for a business to be open and accepting tourists, they must first hold a JTB licence and receive a COVID-19 compliance certification from TPDCo. The certification requirements include the submission of three documents: an emergency plan, physical distancing procedures, and communication and reporting protocols. It is suggested that TPDCo build on this model by developing a voluntary quality assurance programme which asks businesses to submit additional management plans as part of the licensing/certification programme, such as visitor health and safety, worker health and safety, on-site security, climate/disaster risk assessments and mitigation, and monitoring visitor satisfaction. These combined management plans form the essentials of a quality management system. Minimum requirements for plans should take into consideration the size and scope of tourism operations.
- Ensure documentation and inspection requirements are structured efficiently to reduce complexity and redundancy. Use automation and database technology to further improve efficiency for users and managers.
- Develop a template Quality Management Policy/Plan that tourism enterprises must fill in and submit as part of the mandatory licensing programme. This template would be most beneficial to SMTEs with limited resources to develop sophisticated operational management plans.
- Develop a library of downloadable training modules and resources that enterprises can access.
- Provide training (through TPDCo, BSJ and/or JCTI) and support to SMTEs to develop quality management policies and plans.

Table 32: Priority Action 2.2.1: Establish a quality management standard for tourism enterprise

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Contractor to develop the quality management template/standards; train TPDCo staff and host workshops for the sector in use of the templates: J$3 million / US$ 20,000	JTB, BSJ, JHTA and other trade associations, SMTEs

Objective 2.3

Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern

Priority Action 2.3.1: Establish internationally recognised standards that focus on pillars of Destination Assurance such as quality, health, safety, security, resilience and sustainable tourism best practices.

- Standards that incorporate the defined tenets of Destination Assurance should be developed for, and with input from, Jamaican tourism enterprises.
- Established standards for risk management, health and safety, and environmental management (e.g., relevant ISO standards) should be adapted for Jamaica-specific issues.
- Standards that specifically address seamlessness and resilience are not currently published, though certain best practices related to these pillars are included sporadically in other international standards. It is suggested that Jamaica take the opportunity to define seamlessness and resilience in the Jamaican context and consider drafting a standard which would be applicable to the global tourism industry.
- It is suggested the Destination Assurance standard adapt the GSTC-I, which is the universally accepted standard for sustainable tourism and covers best practices related to sustainable management, socio-economic impacts, cultural impacts and environmental impacts.
- While the GSTC-I includes a focus on environmental management, if it is adopted in Jamaica, supplementary indicators should be added to address climate change mitigation and adaptation as well as disaster risk reduction and mitigation. Additional suggestions include establishing a carbon trading programme for the accommodation sector as well as requirements for peril insurance and business continuity plans for most enterprises.
    - Identify specific best practices for climate change mitigation and adaptation, disaster resilience, and environmental management to include in the Destination Assurance standard. The measures outlined below should be considered for inclusion in the standard with the understanding that future disasters will occur and each stakeholder needs to be aware of their role in preparing for and responding to the events. In addition, although climate change is a slow onset hazard, actions need to be taken immediately to address the current and expected impacts in the future.
    - Integrate updated climate change, disaster resilience and environmental sustainability content into the Team Jamaica programme to ensure that it contains the most current science and best practices.
    - Establish a mechanism to broaden awareness of tourism emergency response systems across the sector.
    - Implement a national public awareness programme aimed at the tourism sector to assure them of safety measures in the destinations.
    - Implement measures to cultivate a culture of preparedness in enterprises, tailored to the specific context.
        - Build trust in enterprises and communities grounded in the culture, context and history of the disaster experiences in the area.
        - Include the cultural perspectives of all stakeholders in all new plans and programmes.
        - Create cross-cultural communication systems.
        - Build on local practices and successes to enhance systems that are already in place and familiar to stakeholders.
        - Ensure that enterprises and destinations establish and conduct emergency drills and exercises to reinforce the pr paredness plans.
    - Develop and implement tourism workshops to increase the capacity of tourism enterprises to develop individual preparedness and emergency response plans.
    - Develop guidelines for climate change mitigation and adaptation, disaster resilience and environmental sustainability based on the GSTC-I and other standards, incorporating local, national and regional issues.
    - Encourage development of a family preparedness guide for tourism employees.
- The Destination Assurance standards should be developed in coordination with various stakeholder groups to ensure all best practices are applicable to all sectors of the tourism industry, are achievable for businesses of every size, and meet the objectives of the Master Plan for Sustainable Tourism Development.
- The Destination Assurance standards should be developed as a tool which can be used for educational purposes (e.g., a how-to guide on implementing practices) and as a verification mechanism (e.g., a checklist of practices implemented, verified by a second or third party). Training modules and toolkits should be developed to help enterprises achieve standards and prepare for certification.

Table 33: Priority Action 2.3.1: Establish internationally recognised standards that focus on sustainable tourism best practices

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Workshops: J$2.8 million / US$18,666 Contractor: J$6 million / US$40,000	MOT, JTB, BSJ, TPDco, NEPA, Municipal Corporation, MDA partners.

Objective 2.4

Establish voluntary standards for product development

Priority Action 2.4.1: Establish product development standards that address authentic and high-quality experiences and products.

- Product development guidelines or standards should be developed for "packaged" and "non-packaged" tourism products to address issues of authenticity and quality appropriately. Following are key considerations for this effort:
- Consult with external agencies to provide information from the marketplace.
- While packaged trips such as all-inclusive, cruise-line approved excursions tend to excel at providing quality products and experiences, they are somewhat sanitized and may lack authenticity.
    - Ensure packaged products include authentic Jamaican experiences and support community tourism.
- While non-packaged trips such as self-planned, self-guided excursions allow for an authentic experience, it is possible that the self-selected products and experiences lack high-quality service and execution.
    - Ensure all non-packaged products are operating at the highest quality and are in line with destination assurance tenets.
- Encourage the development of experience-based products which align with the market's increasing desire to connect with local culture, natural resources, and outdoor recreation.
    - Incentivise the private sector to support development of unique product experiences within destinations.
    - Increase product development competencies nationally by increasing the local pool of professionals who can offer product development services.
    - Employ creativity in development of new product experiences, considering varieties of product offerings that may be based on nature, community, crafts, and other authentic Jamaican experiences.
    - Strengthen product assessment and verification processes, guided by standards for top-tier, internationally recognised high-quality experiences.
    - Leverage the results of tourism product inspections to move beyond compliance to support product development and continuous improvement.
    - Facilitate data collection regarding the enterprise's future product development goals as a means to monitor their progress and where possible provide business development or financial support to achieve goals.
- Enforce standards governing items to be sold in craft markets.
    - Establish standards or requirements for the Jamaican-made label when it is fully implemented. Consider how this can be tied to the quality assurance rating system.
    - Enforce the National Craft Policy and set specific standards for craft making and distribution.
    - Establish and enforce new standards as necessary.
    - Provide training and support for craft makers and market managers.
    - Improve linkages between craft makers and the tourism value chain.
- Develop Business Development Standards to help enterprises maximise opportunities to grow their business.
    - Examples include reservation and payment systems, business information, business planning, asset registration and maintenance, and aspects of communication with visitors such as pre-arrival information that tells visitors what to expect.
- Provide information about and encourage the use of technologies to increase customer confidence in health and safety protocols, such as no-touch check-in and online reservation systems (e.g., for local restaurants, attractions)

Table 34: Priority Action 2.4.1: Establish product development standards that address authentic and high-quality experiences and products

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Table 34: Priority Action 2.4.1: Establish product development standards that address authentic and high-quality experiences and products Introductory workshops for SMTEs and Attractions: J$2.8 million / US$18,666	JCTI, JNHT, UDC, Craft Associatio

Objective 2.5

Introductory workshops for SMTEs and Attractions: J$2.8 million / US$18,666

Priority Action 2.5.1: Establish a Destination Assurance Certification Programme Scheme.

With significant direction and support from JTB, establish a Destination Assurance Certification Programme Scheme, ecolabel, and incentive programme that builds on the current compliance framework. There are four primary areas to consider when developing a national certification program:

1. Standards
2. Certification Schemes
3. Ecolabelling
4. Operations

1. STANDARDS

- Ensure all standards—regulatory, quality, and destination assurance—are applicable and achievable. This includes all process-oriented criteria (e.g., whether an enterprise has procedures for waste management) and prescriptive practices (e.g., whether enterprises have recycling bins on site).
- The standards should be composed so that a user can review the criteria and determine a yes or no response; for example, "The business has a documented environmental management system – yes or no."
- All criteria should include implementation/audit guidance to help enterprises interpret compliance requirements. This guidance should also be applicable to auditor resources so they can confirm when enterprises are in compliance.
- BSJ should approve quality and destination assurance standards.
- Create sustainability standards recognised by GSTC.
    - Align standards to GSTC-I, but also be sure they speak to the local situation and meet local objectives.

2. CERTIFICATION SCHEMES

- Define a consistent rating system, scoring, and minimum thresholds.
    - Develop a tiered recognition system by taking sector, scope, and size of operations into consideration, a justing minimum requirements and thresholds accordingly to allow for flexibility to address the variable needs of micro, small, medium, and large enterprises.
    - Determine whether criteria are pass/fail or scored on a percentage of implementation (25% implemented, 75% implemented).
    - Define the programme rating system (e.g., bronze, silver, gold; basic intermediate, advanced; 1, 2, or 3 stars).
- Define certification procedures and requirements using ISO conformance audit best practices (ISO 17065, ISO 17021, ISO 19011, ISO 14024) and the GSTC Accreditation Manual.
- Engage NCBJ throughout the planning process to ensure they are equipped to oversee the certification programme.
- Develop an auditor training programme and enrol qualified auditors.
    - Auditors should have sufficient qualifications and previous experience auditing to ISO 14001 and or GST standards.
    - Auditor training should provide participants with
        - an introduction to the objectives of Destination Assurance,
        - an introduction to the specific principles of the Destination Assurance standard and interpretation exercises for criteria,
        - specific guidance on auditing and inspection procedures (e.g., document review, on-site inspection, findings report), and
        - the scoring scheme.
- Utilize the newly developed TPDCo Automated Licensing Platform to administer the Certification Programme, making full use of features such as enterprise databases, document management, workflow management, and multi-user access.
- Develop the necessary documentation and complete the required procedures to have the certification programme accredited through NCBJ and/or GSTC.

Figure 26: Potential Certification Process



3. ECOLABELING

- Develop a marketable ecolabel that can be used by participating businesses. An ecolabel is a consumer-facing logo or label that shares information and/or validation of sustainability measurement.

  A logo is an image that is displayed on websites or in brochures; it is the image that can be a sticker to display in a window. This is also the image that would be used by JTB and others to promote the national certification programme.

Figure 27: Example Ecolabel



An ecolabel is an image that contains specific information about the validation of sustainability measures. The ecolabel is commonly used for an award certificate or plaque. The information on an ecolabel should include:

- The scope of the certification (e.g., tour operations, hotel & restaurant)
- The level awarded
- The name of the certifying body
- The issue and expiration dates of the certification

- The Destination Assurance Certification Programme should consider various types of labels and recognition.
  - Compliant: Examples include the COVID compliance certificate and Disaster Preparedness Plans.
  - Destination Assurance Certified: Awarded to enterprises that have met minimum compliance standards and minimum thresholds for quality and sustainability. For those businesses who have gone above and beyond the minimum requirements, the label would also include specific ratings on quality and sustainability.
  - Quality Rating System: In addition to Destination Assurance Certified, provide an independent rating based on excellence in quality service and products.
  - Sustainability Rating System: In addition to Destination Assurance Certified, provide an independent rating based on excellence in sustainability.

4. OPERATIONS

- Develop a Business, Marketing, and Implementation Plan (BMI) for the Destination Assurance Certification Programme to guide operations. Define programme governance for programme management and oversight.
    - Determine who owns the standards and will be responsible for revisions.
    - Determine whether the certification programme will be accredited nationally or internationally.
    - Determine who will administer the certification programme.
        - Who is the liaison for enterprises?
        - Who facilitates training and advisory support?
        - Who are the auditors and who employs them?
- Define the operational procedures for an audit and awarding certification.
- Define operational management procedures for staff administering the programme.
- Develop an incentive-based marketing programme through JTB that awards those enterprises which achieve certification to encourage participation.

Table 35: Priority Action 2.5.1: Establish a Destination Assurance Certification Programme Scheme

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	In-house requirements: J$4.5 million / US$30,000 In-house requirements Contractor - programme design and set up: J$4.5 million / US$30,000	NCBJ, JTB, JHTA and other tourism associations

Objective 2.6

Build capacity of enterprises to adopt quality, resilience, sustainability and product development standards

Priority Action 2.6.1: Provide online training that supports adoption of new standards.

Provide online training that will ensure widespread access to materials on topics related to customer service, health and safety, security, environmental conservation, climate change and disaster risk reduction, including COVID-related operations and emergency response and preparedness.

- Create and distribute training programmes, permits, certificates, and so on for completing customer service programmes, health and safety programmes (e.g., for water sports operators, adventure tourism), and COVID training programmes offered by TPD-Co and/or JCTI. Trainings should accomplish the following:
    - Translate destination assurance, safely reopening, and the Jamaica Brand into a customer service ethos with an associated training programme.
    - Describe internationally accepted etiquette guidelines (especially considering COVID) compared to what might be perceived as harassment or unsafe interactions.
    - Provide talking points on how health, hygiene, and COVID precautions can make visitors feel safe and build confidence in their brand.
    - Provide training in risk management for tourism enterprises, which should include identifying and assessing their risks and creating a risk management plan.
    - Increase training in risk communication between the local authorities, tourism enterprises and the exposed community (tourists, tourism workers and local residents) on local disaster issues, to enable more efficient and effective response where there is a hazard.
    - Provide training to tourism enterprises in crisis management planning, including business continuity. This would enable businesses to develop or obtain support for their own crisis management plan.
    - Provide training to tourism enterprises on how to develop preparedness, response and recovery plans for specific hazards for which they are at risk.

- Include learning objectives and performance measurements to ensure programmes produce meaningful results.
- Institutionalise ongoing training in the industry for all staff (e.g., professional development options every two years).
- Engage Aquila Center for Cruise Excellence or a similar organisation in training to prepare for the return of cruise ships. Aquila offers virtual trainings that include COVID guidelines for front-line cruise workers to learn how to deliver excellent customer service while wearing a mask, make personal connections with guests while distan ing, encouraging compliance from guests, and managing difficult situations. Consider similar training programmes for the entire tourism industry.
- Maintain a registry of the suite of training opportunities available within the sector for all levels of staff.

- Promote and provide guidance and/or training to enterprises on international and local standards that apply to them. In some cases, enterprises might not be aware of all the standards that relate to their operations and they may implement voluntary standards that would improve their operations and the quality of their product.
- Enhance professional development quality management programmes.
- Develop and increase training offerings that support product development and experiences for communities and tours.
    - Explore strategies to value and hone cultural strengths, abilities and craft competencies as well as entertainment experience development at early stages of academic development (primary and secondary levels). Design youth training programmes to encourage them to participate in the tourism value chain. These training sessions would emphasize general skills for working in multiple sectors of the tourism industry.
- Design training programmes focused on middle- and upper management responsibilities that are directed towards current tourism employees and can help improve upward mobility in the workforce. These training sessions would emphasize topics like quality assurance, managing food costs, preparing budgets, and performing company evaluations.

Table 36: Priority Action 2.6.1: Provide online training that supports adoption of new standard

TIME HORIZON	RESOURCES	PARTNERS
Short Terrm (Years 1-3)	Contactor: J$4.5 million / US$30,000	JCTI, ODPEM, MOHW

Priority Action 2.6.2: Raise awareness of locals and visitors about health, safety and security best practices.

Develop and implement campaigns to raise awareness among locals and visitors about sensitive issues related to health, safety and security.

- Create and distribute messaging to be used by tourism enterprises and shared with visitors related to health, safety, security, environmental protection, disaster resilience, and climate change and adaptation. Specifically, these programmes should address recognising the difference between local culture/customs and perceived harassment, and should explain how to report actual harassment.
- Expand the "Treat our visitors right" public service campaigns in areas where known harassment takes place (outside of ports, shopping areas, craft markets, and beaches). Specifically, include good practices to consider related to perceived harassment and social distancing.
- Evaluate how an excess of unlicensed operators and vendors such as unlicensed taxis, tour operators, and street vendors impacts harassment of visitors and use insights to develop measures to enhance enforcement of requirements.

Table 37: Priority Action 2.6.2: Raise awareness of locals and visitors about health, safety and security best practices

TIME HORIZON	RESOURCES	PARTNERS
Short Terrm (Years 1-3)	Communications: J$16 million / US$106,666	JCTI, JTB, ODPEM,

3. Regional Management of Destination Assurance

Table 38: Regional Management of Destination Assurance - Goals and Objectives

GOALS	OBJECTIVES
3. ESTABLISH PERMANENT, REGIONAL MANAGEMENT OF DESTINATION ASSURANCE	3.1 Establish a destination stewardship standard. 3.2 Establish regional destination management organisations. 3.3 Expand the National Destination Assurance Programme to include certification of local destinations.
GOAL 3 INDICATORS 3a. Number of RDMOs implementing the Destination Stewardship Standard 3b. Number of RDMOs certified 3c. Number of Destination Assurance initiatives put in place by RDMOs	

A. Introduction

Local destinations play a central role in destination assurance. Destination assurance implies the satisfaction of *all* tourism product and service needs, requirements and expectations across the value chain. While tourism enterprises work to maintain and exceed visitor expectations through the experiences and services within their manageable interests, local destinations are responsible for addressing all destination-level quality and environmental issues that impact the visitor experience, such as infrastructure, public amenities and services, and safety and security.

Effective, sustained destination management at the local level is paramount to destination assurance. The current structure established for managing destination assurance at a local level is the DAC. The DACs bring together key public sector agencies, private sector leaders, and leading organisations at the regional level to "ensure the development, improvement and sustainability of the tourism product within the Resort Areas", according to TDPCo. members of the DACs are appointed by the Minister of Tourism and TDPCo employs a Destination Manager for each Resort Area to support the DAC.

Following are the main issues associated with the DACs identified through a DAC assessment survey conducted as part of the stakeholder consultation process for the DAFS.

- **Variability in understanding of DAC goals and progress towards goals:** The majority of respondents indicated that they are uncertain about DAC goals. Some respondents said the purpose of their respective DAC is to maintain and/or improve the tourism product; others said the purpose is to improve infrastructure and solve destination problems. Furthermore, 45% of respondents said that few or none of their respective DAC goals are being achieved, 30% said some goals are being achieved, and just 25% said most or all goals are being achieved.

- **Inconsistent implementation:** While 71% of respondents said that their respective DAC does have an action plan, only 52% said that projects are budgeted and are implemented consistently.

- **Limited tourism stakeholder awareness of DACs:** While 71% of respondents agree that their respective DAC has an official role, most felt that their respectie DAC was not well known in the destination (58% of respondents noted that destination stakeholders are either moderately, slightly, or not all aware of the DAC). In a separate survey of tourism enterprises, 55% of respondents were not aware of the existence of a DAC in their Resort Area.

- **The accountability and reporting mechanism is not functioning properly:** Most survey respondents commented that DAC members are primarily held accountable through the meetings, and only 43% said that the reporting mechanism is functioning very well or extremely well.

While DAC members noted that the existing structure for destination stewardship does enable dialogue, cooperation and collaboration (75% of respondents either agreed or strongly agreed), several critical gaps were flagged. DAC survey respondents and focus group participants noted that the DACs do not have legal authority to make needed changes in destinations, and often do not have a budget for projects. Meetings in some Resort Areas are organised irregularly and attendance is generally low. Given that the accountability of DAC members is largely maintained through meetings that are inconsistently scheduled and attended, it is evident that the structure is not working effectively. Focus group participants also indicated a need to improve DAC communications and operational guidelines.

Overall, 52% of DAC members completing the DAC assessment survey stated that they are either satisfied or very satisfied with the performance of the DACs. Yet, in a separate survey that targeted tourism enterprises, respondents gave DACs an average score of 2.7/5.0 for their effectiveness.

Overall, survey results and focus group feedback indicate that the current DAC structure is only marginally effective. A more consistent and permanent regional destination management structure is needed to address these issues. Furthermore, a destination standard is needed to guide regional destination management efforts and ensure consistency across Resort Areas.

B. Objectives

Objective 3.1
Establish a destination stewardship standard

The aim of this objective is to establish a voluntary destination stewardship standard that supports local destination planning and management; enhances destination resilience; and improves management of attractions and sites and of the environmental impacts of tourism. The destination standard will provide specific guidance—initially to DACs, and later to RDMOs—on priorities and recommended strategic actions for sustainable destination management.

A programme should be developed around the standard to assist the DACs, and eventually the RDMOs, in leading a participatory planning process. This process would begin by assessing the destination's baseline performance against the criteria and indicators outlined in the destination standard. Through the participatory planning process, RDMOs can work with stakeholders to develop a shared vision and plan for tackling priority issues based on the destination assessment findings. RDMOs, once established, will work with the DACs and other partners to implement the destination management plan.

Jamaica's Destination Assurance Certification Programme will include a certification process and ecolabel for local destinations. Destinations will be able to choose to obtain national certification or pursue international certification from programmes such as Green Destinations or EarthCheck. Each RDMOs should have a DAC that will serve as the steering group to assist destinations with preparation and throughout their journey towards certification.

Objective 3.2
Establish regional destination management organisations

Establishing RDMOs will create a more consistent and permanent structure for destination management that will ensure continuous improvement, seamlessness and visitor satisfaction at the local destination level. Following are the main objectives the RDMOs could accomplish:

- Develop and oversee implementation of a shared vision and plan for sustainable destination development and management, based on destination stewardship criteria.
- Prioritize and tackle complex destination issues, such as beautification projects and placemaking, that require multi-sectoral interventions.

- Foster greater community involvement in placemaking and continuous improvements, using an award scheme offering compelling prizes to fund construction/enhancement projects.
- Serve as destination liaison between tourism enterprises and the Destination Assurance Certification Programme, by providing information, consultation and technical assistance to tourism enterprises and serving as a home base for inspection teams.
- Serve as destination liaison between local destinations and the Destination Assurance Certification Programme by serving as the hub for information about the certification process and the technical assistance programmes destinations can choose to pursue.
- Serve as a regional visitor centre providing in-situ information.
- Serve as regional liaison for tourism emergency and disaster management.
- Negotiate agreements with local authorities and MDAs to ensure the timely delivery of critical services that impact the destination assurance, such as garbage collection.

The RDMOs will be an integral part of the tourism governance system overseen by the Ministry of Tourism, and will report to TPDCo's Board of Directors. The RDMOs will have adequate staff and an annual operating budget based on the needs of each Resort Area. RDMOs will be guided by a destination standard and a regional tourism plan that outlines goals, strategies and priorities for the Resort Area.

The DACs will remain as important *networks* supporting the work of the RDMOs. The DACs should be managed more effectively by the RDMOs, sharing responsibility for destination management with local government, private sector, MDAs and the third sector. The DACs' main objectives will be to:

- Foster ongoing dialogue, cooperation and collaboration among local stakeholders for destination stewardship.
- Incubate catalytic projects that address priority issues associated with destination quality, product development and sustainability.

The chair of the RDMO's DAC should ideally have a seat on TPDCo's Board of Directors, to streamline reporting and ensure full alignment of the RDMO's efforts to the MOT's national priorities and policies.

Objective 3.3

Expand the National Destination Assurance Programme to include certification of local destination

Similar to the objectives outlined in this report for enterprises, Jamaica should expand the National Destination Assurance Programme to include a national voluntary sustainability standard for its local destinations. To support adoption of the destination standard and ensure continuous improvement of destination performance over time, it will be critical for TPDCo to provide destinations with technical assistance to develop a baseline performance assessment and a follow-up plan to address priority destination management gaps.

Jamaica has several paths for encouraging local destinations to verify their status and performance against the criteria outlined in the national standard for local destinations. Similar to the benefits programme offered to enterprises that meet regulatory requirements, Jamaica should offer compelling benefits to destinations that are certified. Destination marketing and financing of destination management priority projects could provide a good mix of benefits.

C. Strategies

The main measures that will be used to achieve the goal of establishing permanent, regional management of destination assurance are outlined below.

1. Enhance Destination Governance & Management

While tourism governance is highly centralized in Jamaica, current and future industry demands require decentralization to ensure local destination quality, resilience, sustainability and competitiveness. Negative impacts and changes occur at a local level and are best managed at this level. Currently, the DAC is operating as a network of actors that come together when convened by TPDCo (the destination manager) to tackle destination issues as they emerge—reactive management. The performance of the DACs is highly variable and marginally effective. This ad hoc network structure is valuable in some contexts but not the appropriate structure to deliver the proactive destination planning and sustained management needed for destination assurance.

Regional destination management organisations (RDMOs) are a long-term solution. RDMOs can be established at a Resort Area level, as an integral part of Jamaica's formal tourism governance structure and the MOT. A phased approach to establishing regional destination management organisations is recommended, to prepare for the structural and legislative changes that decentralization requires.
New legislation authorizing the RDMOs will be needed. In the short term, the DACs should continue to oversee effective destination management. However, DACs should be reorganised to improve their effectiveness, a destination standard should be established with clear goals for DAC performance, and DACs should continue fulfilling the basic destination coordination and management functions until the RDMOs are established and functioning.

2. Introduce Destination Stewardship Standard

Continuous improvement at the destination level and consistency in key aspects of destination attractiveness can best be achieved by providing destinations with specific guidance about what they should be prioritizing and working on to ensure effective and sustainable destination management.

Countries around the world—for example, Colombia, Indonesia, Norway and Slovenia—are increasingly promoting a voluntary national standard for their local destinations. One popular choice is the GSTC-D, which is considered the global baseline standard for destination sustainability. The GSTC-D has been developed and revised for almost a decade, includes stakeholder input from destinations of all sizes and situations, and has been accepted as the de facto standard for sustainable destination management. The GSTC-D covers four key pillars of sustainable destination management:

- Tourism planning and management
- Monitoring of community benefits from tourism
- Management of natural and cultural attractions
- Environmental management including disaster risk management and climate change adaptation and mitigation

A national standard for destinations can help ensure that all local destinations in Jamaica are working towards similar goals and tackling the most pressing issues across all key pillars of destination sustainability. This could be done by adopting the best practices and criteria of the GSTC-D, and then adapting the implementation guidelines to best fit local context, needs and objectives.

3. Provide Technical Assistance & Certification

Developing the destination sustainability standard is only the first step in the journey that will ensure that local destinations move towards a more effective destination management model. A toolkit and programme will need to be developed around the standard to articulate the steps destinations should take to adopt the standard and eventually seek certification if desired. The destination stewardship toolkit should include guidance and resources for each step of the process. Technical assistance should be available to destinations to help them through the recommended process for adopting the standard that is designed to improve destination management.

The Destination Assurance Certification Programme can be expanded to encompass destinations. Destinations can choose to pursue certification as a means of verifying their performance against the standard.

Objective 3.1
Establish a destination stewardship standard

Priority Action 3.1.1: Develop national destination stewardship standard.

A destination standard can be a useful tool for improving destination management. Jamaica can choose to adopt an existing standard such as the GSTC-D, which is the globally accepted standard for destination sustainability, and then tailor it to local realities through a stakeholder consultation process. Piloting the GSTC-D in local destinations at different stages of development can help to further tailor the standard.

The stakeholder consultation process for development of the DAFS surfaced key considerations that are of particular importance to Jamaica and should be prioritized in the national standard. These are outlined below.

1. Improve the natural, physical and social environments in destinations. The destination standard should encourage:
    - Development of a tourism infrastructure and placemaking plan for improvement of the destinations that incorporates creative approaches to raise funding for projects
    - Monitoring implementation of the tourism infrastructure and placemaking plan
    - Development and implementation of maintenance schedules and budget to support management of physical facilities
    - Development of broader destination management plan that will support continuous improvement and establish a monitoring framework that is tracked by a designated tourism agency with support of partners
    - Use of trees and built structures for shading and cooling of public spaces to respond to rising temperatures and mitigate the Urban Heat Island effect in built-up areas
    - Use of green infrastructure for stormwater drainage in urban destinations to reduce the incidence of flooding and improve aesthetics
    - Implementation of energy and water conservation strategies to improve sustainability
    - Development practices that minimise alterations to adjacent ecosystems and that maintain natural protection in vulnerable areas (e.g., coastlines and hillsides).
2. Development of targeted strategies to engage communities within and around key tourism destinations to help them understand the importance of tourism and their role in tourism, and to enlist them in becoming tourism ambassadors. Strategies should also encourage community involvement in development of Jamaica's tourism product.
3. The destination standard should also prioritize improving the aesthetics of the destinations. The destination standard should address:
    - Visual pollution (illegal signs, multiple mismatched signs, unattractive verges, illegal dumpsites, etc.) in destinations
    - Alternative methods of garbage collection that don't utilize open skips
4. Strengthen destination-level security, since this remains the top area of concern among visitors.
5. Incorporate best practices for climate change mitigation and adaptation, disaster resilience, and environmental management.

The adoption of a national destination standard will help to ensure consistency across destinations, which can have a significant positive impact on the experience visitors have throughout the island.

Table 39: Priority Action 3.1.1: Develop national destination stewardship standard

TIME HORIZON	RESOURCES	PARTNERS
Short Terrm (Years 1-3)	Contractor: J$9 million / US$60,000	BJS, GSTC, DACs, NEPA

Objective 3.2
Establish regional destination management organisations

Priority Action 3.2.1: Institutional strengthening of Destination Assurance Councils.

While the long-term vision is to establish RDMOs, it will be critical to strengthen the existing DACs in the short term so that they can help fill pressing destination management gaps. Since the DACs are in essence a network, there is a need to improve the network design to ensure more effective and consistent performance. There are three key actions recommended:

1. Develop and roll out a new network structure for DACs that can more effectively help manage destination assurance at a regional level

2. Develop and implement a Toolkit for Effective Networks that will provide Destination Managers and DAC members with guidance in the following areas:
   - Clarifying the purpose of the DACs
   - Ensuring that the right people and organisations are convened
   - Good practices for cultivating trust within the DAC and at the destination level
   - Effective approaches for more effectively engaging DAC members and coordinating actions
   - Establishing a robust structure for implementation and monitoring of projects and initiatives
   - Improving network leadership
   - Effective network operations
   - Effective decision-making

3. Dedicate core funding to ensure that Destination Managers have a budget and some support staff to carry out a more aggressive agenda

4. Fund the implementation of destination assurance priority programmes and initiatives in each Resort Area by establishing a funding window through TEF and other agencies

5. Establish a network monitoring process for annual assessment of DAC performance and impacts to ensure continuous improvement

6. Improve accountability by appointing DAC chairs to the TPDCo Board of Directors, to ensure consistent progress reporting and full alignment of DAC efforts with MOT priorities

There is also a need to strengthen the presence in the DACs of NEPA, the Office of Disaster Preparedness and Emergency Management (ODPEM) and the Climate Change Division, to improve actions around climate change mitigation and adaptation, disaster resilience and environmental issues. The stakeholder consultations revealed that government agencies such as the Climate Change Division are challenged by the need to spread few staff members across all levels of governance (local, national and international); these agencies must be strengthened so that they can adequately deliver the guidance needed to minimise destination-level risks and enhance destination assurance to visitors and residents.

Table 40: Priority Action 3.2.1: Institutional strengthening of Destination Assurance Councils

TIME HORIZON	RESOURCES	PARTNERS
Short Terrm (Years 1-3)	Contractor: J$9 million / US$60,000	DACs

Priority Action 3.2.2: Establish regional destination management organisations.

While DACs can help fill destination gaps in the short term, it is important to recognise that networks are not a permanent solution; the DAC members are community leaders that have full-time jobs elsewhere, so the only dedicated personnel focused on destination coordination is the Destination Manager. This limits the impacts and outcomes that can be achieved through DACs. Hence, a deliberate process should be undertaken to assess the integration of RDMOs in Jamaica's tourism governance framework. This will require amendments to the JTB Act, as TPDCo is designated as an executing agency of the JTB to carry out the product development functions under Section 14 subsection (1) of the JTB Act.

Recommendations for the main roles of the RDMOs in relation to destination assurance have already been outlined in Section IV-B. Dedicated funding for RDMOs is required to ensure their effectiveness and lasting impacts.

Table 41: Priority Action 3.2.2: Establish regional destination management organisations

TIME HORIZON	RESOURCES	PARTNERS
Medium to Long Term (Years 4-10)	Stakeholder Consultations: J$2.8 million / US$18,666 Core costs for RDMOs: J$140 million / US$93,333	JTB, Attorney General, DACs, destination stakeholders

Objective 3.3

Expand the National Destination Assurance Programme to include certification of local destinations

Priority Action 3.3.1: Develop Destination Stewardship Toolkit and Technical Assistance Programme.

Local destinations will need assistance to adopt the new destination standard. A Destination Stewardship Toolkit should be developed to provide destinations with the guidance needed to put the destination standard into practice. A complete guide outlining the recommended steps and resources should be compiled and made publicly available to DACs and destination stakeholders. The toolkit should consider basic elements such as:

1. Explanation of criteria and indicators outlined in the standard, with resources that can help destinations to operationalize the criteria
2. A recommended stakeholder consultation and information gathering process for assessing baseline performance on the criteria and indicators outlined in the destination standard
3. Guidelines for using the baseline assessment results to develop an action agenda through a participatory planning process
4. Guidelines for monitoring implementation and periodic reassessment of destination performance

Destinations may need technical assistance to successfully adopt the destination stewardship standard. A cadre of local destination management experts should be trained to provide technical assistance services to destinations that decide to adopt the voluntary destination standard. The technical assistance programme should be designed to assist destinations in working through the recommended process for adopting the standard and using it to identify destination risks and opportunities. The programme should help destinations:

1. Conduct a baseline assessment of the destination's performance
2. Develop a destination stewardship action agenda
3. Guide the DACs (and eventually the RDMOs) in leading implementation of the destination stewardship action agenda
4. Monitor plan implementation and its impacts
5. Conduct periodic reassessments

Table 42: Priority Action 3.3.1: Develop Destination Stewardship Toolkit and Technical Assistance Programme

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1-6)	Contractor: J$9 million / US$60,000 TA Programme - pair up destinations with local consultants; TPDCo. provides part funding per year: J$40.5 million / US$270,000	DACs, local consultants

Priority Action 3.3.2: Establish a destination certification system.

The Destination Assurance Certification Programme can be expanded to encompass destinations. Destinations can choose to pursue certification as a means of verifying their performance against the standard. Various approaches can be used to manage destination certification:

- The national Destination Assurance Certification Programme can be expanded to include destinations. In this approach, Jamaica maintains full control of the certification process, managing the overall process including auditing and certification. Innovation Norway is an example of this approach.
- Jamaica can subcontract management of the Destination Assurance Certification Programme to a third party. Slovenia has adopted this approach, partnering with Green Destinations.
- Jamaica could focus on encouraging local destinations to seek international certification from bodies such as Green Destinations and EarthCheck. In this approach, Jamaica would provide encouragement and technical assistance to help destinations achieve certification, but would stop short of verifying the status of local destinations' performance.

A cost-benefit analysis of these approaches will need to be conducted to determine the best approach for Jamaica.

Table 43: Priority Action 3.3.2: Establish a destination certification system

TIME HORIZON	RESOURCES	PARTNERS
Medium Term (Years 4-6)	Contractor: J$7.5 million / US$50,000	NCBJ, international certification bodies

Priority Action 3.3.3: Promote widespread adoption of destination standard.

Programme roll out will need to be carefully planned and executed. Guidance gleaned from countries interviewed as part of the global benchmarking indicates that how the standard is launched does impact the overall success of the programme. TPDCo should organize and implement a well-designed national promotional campaign that effectively conveys the importance of destinations adopting the standards, articulates the technical assistance available, and describes the incentives and benefits of adopting the standard.

A compelling package of destination-level incentives will be needed to encourage widespread adoption of the destination standard. Secure funding for priority national destination assurance programmes could serve as an important component of the package of incentives. The creation of a dedicated destination stewardship funding window could be explored. Access to such a funding option could motivate destinations to pursue adoption of the destination standard.

Table 44: Priority Action 3.3.3: Promote widespread adoption of destination standard

TIME HORIZON	RESOURCES	PARTNERS
Short to Long Term: (Years 1-10)	Communications: J$10 million / US$66,666 Contractor: J$3 million / US$20,000	Ministry of Finance, Ministry of Industry and Commerce, TEF, financial institutions such EXIM Bank, Jamaica National and others

4. Improved Management of Destination Assurance

Table 45: Improved Management of Destination Assurance - Goals and Objectives

GOALS	OBJECTIVES
4. ENHANCE SHARED MANAGEMENT AND MONITORING OF DESTINATION ASSURANCE	4.1 Establish automated coordination systems and build capacity of MDAs for shared management and monitoring. 4.2 Introduce a guidance document for the management of the National Destination Assurance Programme. 4.3 Establish a monitoring system that will facilitate continuous improvement.
GOAL 4 INDICATORS 4a. Number of TPDCo staff dedicated to managing Destination Assurance 4b. Visitor satisfaction indicators improving 4c. Repeat visitors indicators increasing 4d. Tourism revenue indicators increasing 4e. Tourism workforce indicators improving 4f. Quality of life indicators improving	

A. Introduction

Currently each MDA operates its own internal licensing and approval structure, with little coordination with other agencies. There are as many as 14 MDAs as well as 3 private organisations involved in the licensing process.[97] This is further complicated by the use of paper-based applications, inspections and verification checklists. As a result, it is difficult to track entities through the licensing process to determine compliance status. Additionally, tourism enterprises have difficulty getting timely responses regarding the status of their applications, licensing delays at one MDA are not reported to others or to TPDCo, and tourism enterprises are not granted relief from the increased cost of renewing expired licensing and certificates after MDA delays. This also means that TPDCo is limited in its ability to track the performance of entities over time for continuous improvement purposes, hampering their ability to coordinate with other MDAs, improve internal processes and recommend corrective actions on a timely basis.

To correct the bottlenecks identified so far in the existing National Destination Assurance Programme and to support the successful evolution of the current programme as proposed in previous sections of this DAFS report, there is a need to improve governance (intragovernmental and public-private cooperation and collaboration) and management (effectiveness, efficiency, transparency and accountability) of the overall National Destination Assurance Programme.

[97] *The MDAs and private organizations are Companies Office of Jamaica, Tax Office, Local Planning Authority, Private Security Regulation Authority, Regional Health Authorities, Ministry of Labour and Social Security, Maritime Authority of Jamaica, Jamaica National Heritage Trust, Jamaica Civil Aviation Authority, Jamaica Fire Brigade, NEPA, JCF, Island Traffic Authority, the Resident Magistrate Court as well as Royal Lifesaving Society, Heart Association of Jamaica and the Professional Association of Diving Instructors.*

Recognising the inherent interdependencies and shared responsibilities associated with governance and management of the National Destination Assurance Programme, the goal is to enhance the shared management and monitoring of destination assurance. This will be achieved by

- establishing automated coordination systems and building the capacity of MDAs and new partners for shared management and monitoring,
- introducing an overarching guidance document for the management of the National Destination Assurance Programme, and
- establishing a monitoring system that will facilitate continuous improvement and enhance standards enforcement.

The main objectives of this work, strategies for achieving objectives, and priority initiatives are outlined in the following sections.

B. Objectives

Objective 4.1
Establish automated coordination systems and build capacity of MDAs for shared management and monitoring

The development of the TPDCo Automated Licensing Platform has been suggested to improve the efficiency of the compliance licensing programme for tourism enterprises, allowing them to focus more time and energy on quality, sustainability and continuous improvement. The same automated system can be designed to allow multiple MDAs to access uploaded documents and completed inspections in real time. Improving the efficiency and effectiveness of back-end oversight and management by MDAs will ensure the entire National Destination Assurance programme is generating the intended impact as defined by the MOT.

Objective 4.2
Introduce a guidance document for the management of the National Destination Assurance Programme

Quality management systems ensure that a product or service is consistently delivered. Quality needs to be managed to reach desired objectives and outcomes, and a typical approach is adherence to a structured management system or framework. In essence, a quality management system consists of a set of policies, processes and procedures that any entity establishes to ensure quality, operational efficiency, environmental performance and health and safety in the workplace.

To successfully manage the National Destination Assurance Programme, it is suggested that a basic quality management framework and guidance document be created to steer the overall management of the programme, ensuring it is better able to reach intended goals and objectives. The document will provide guidance to help ensure effective and efficient management of each component of the National Destination Assurance Programme: a) mandatory compliance licensing for tourism enterprises, b) voluntary quality standards for tourism enterprises, c) voluntary sustainability standards for tourism enterprises and destinations, and d) the Destination Assurance Certification Programme for tourism enterprises and destinations. In general, the key functions of the quality management system should include:

PLANNING

- Coordination of leadership and management entities
- Communication protocols for chain of command, stakeholder engagement, and management oversight
- Risk & resilience assessments and mitigation controls

PROCEDURES

- Oversight of programme stakeholders
- Capacity building for all stakeholders
- Programme operations for the Destination Assurance Certification Programme

- Integration of a monitoring and evaluation framework
- Monitoring of key performance indicators
- Evaluation to measure the continuous improvement of programmatic outcomes and impacts

Objective 4.3
Establish a monitoring system that will facilitate continuous improvement

Monitoring visitor satisfaction is a key metric for understanding the success of the National Destination Assurance Programme. High marks will indicate that visitors are receiving quality service in a safe and secure environment. Furthermore, data interpretation can highlight areas where seamlessness and sustainability are meeting desired objectives.

Visitor satisfaction is measured through exit surveys, however the actual visitor experience, be it good or bad, occurs primarily with engagement with individual enterprises—a specific taxi company, a hotel, a restaurant. While many of these enterprises have internal systems for collecting guest feedback, it is difficult to understand whether a negative experience with one enterprise affected a visitor's overall satisfaction or resulted in poor marks on an exit survey. Therefore, a national level strategy and system should be developed to capture visitor satisfaction responses from individual enterprises, to better address any recurring issues that impact a visitor's experience and to foster a culture of continuous improvement.

C. Strategies

1. Automation

Design an automated, multipurpose platform that can be used to streamline the compliance licensing programme, act as a tool to manage a voluntary certification programme, and improve efficiencies in MDA coordination and oversight of the National Destination Assurance Programme. The platform AMANDA, which is currently used by NEPA, is a viable option because it includes the following necessary features: user databases, document management, workflow management, and multi-user access.

2. Policy Change

Amend the JTB Act, the Public Health Act and its regulations, the Executive Agencies Act, legislation related to NEPA—the Natural Resources Conservation Authority Act, Town and Country Act, Beach Control Act, Wildlife Protection Act and Endangered Species (Protection, Conservation and Regulation of Trade) Act—and the Jamaica Fire Brigade Act, among others, to allow for information sharing across MDAs and to grant discretionary powers to MDAs to grant relief to tourism entities for no-fault delays in licensing or inspections.

- MDAs involved in licensing tourism entities should be encouraged to share information digitally while preserving confidentiality in accordance with existing data sharing policies. This might require agreements such as MOUs between the parent ministries, to ensure that the data collection formats are compatible and the correct data is being captured for sharing.
- Amendments should include changes to ensure that MDAs can grant relief to entities who are experiencing extended delays through no fault of their own. Note that discretionary powers to grant relief will likely require policy approval and/or legislative changes, and hence should be discussed among MDAs during the planning stage.
- Provisional permits and approvals can be granted until the delay can be resolved.
- Enterprises can be exempted from having to pay new fees if a certificate, licence or permit expired while awaiting final approval for another permit or certificate and this occurred through no fault of the entity.

3. New Partnerships

Governance and management arrangements will need to evolve as the National Destination Assurance Programme expands to focus on quality and sustainability standards and to encompass local destinations as well as tourism enterprises. While MDAs are the main co-managers of the mandatory compliance licensing process for tourism enterprises, new partnerships will need to be forged for the successful roll out of voluntary quality standards for tourism enterprises, voluntary sustainability standards for tourism enterprises and destinations, and the overall Destination Assurance Certification Programme for tourism enterprises and destinations.

The international benchmarking case studies presented in Chapter 1 (Section III: Review of Global Quality Assurance Systems, D. National Quality Assurance Programmes) identified tourism industry associations as critical partners in the roll out of voluntary quality and sustainability standards for tourism enterprises. TPDCo will therefore need to consider new public-private arrangements and partnerships with trade associations and other companies for the successful implementation of the Destination Assurance Certification Programme for enterprises. Similarly, enhanced and new partnerships will need to be forged with the DACs and eventually the RDMOs as well as external partners for the roll out of destination sustainability standards and certification.

D. Priority Actions

Objective 4.1
Establish automated coordination systems and build capacity of MDAs for shared management and monitoring

Priority Action 4.1.1: Introduce an automated system for managing and monitoring destination assurance.

- Modify NEPA's existing AMANDA platform or develop a similar platform which supports the tracking of tourism entities' applications and performance. The platform would be used to manage compliance standards for licensing as well as for voluntary quality and sustainability standards. The platform would also serve as the online solution for the Destination Assurance Certification Programme, which will focus on the voluntary quality and sustainability standards.
    - This allows for coordination of digital inspection reports from the field, digital application processes and other performance or enforcement measures.
    - Efforts should be made to ensure that all MDAs providing certificates and licences for tourism entities using digital systems can share information electronically, reducing or eliminating the production of paper certificates. This would reduce the delays in licensing and renewals.
    - Specific functions needed include (but are not limited to):
        - Enterprise database
        - Document upload and management
        - Workflow management
        - Multiple user access
        - Executive management
        - Summary dashboards
        - Sequential sign off by MDAs

Table 46: Priority Action 4.1.1: Introduce an automated system for managing and monitoring destination assurance

TIME HORIZON	RESOURCES	PARTNERS
Short Terrm (Years 1-3)	See Goal 1.	See Goal 1.

Objective 4.2

Introduce a guidance document for the management of the National Destination Assurance Programme

Priority Action 4.2.1: Define programmatic governance and operational management for Destination Assurance.

Every goal, objective and action described in the Destination Assurance Framework Strategy aims to enhance the outcomes related to destination assurance. However, it is necessary to define a holistic programmatic structure to ensure the multiple stakeholders which manage numerous components of destination assurance activities are seamlessly connected.

This could be accomplished through a formal Quality Management System (QMS) designed for the oversight and management of the National Destination Assurance Programme.

Specific areas that should be addressed in the QMS include:

- Establishing a programmatic governance model which assigns ultimate responsibility to TPDCo
- Defining programme objectives and outcomes
- Mapping stakeholders
- Assigning roles and responsibilities for management MDAs
- Defining programme operation procedures
    - Compliance licensing
    - COVID compliance certification
    - Quality standards
    - Sustainability standards
    - Destination Assurance Certification
    - Promotions, marketing, and outreach
    - Inspections
    - Training
- Defining performance indicators

Table 47: Priority Action 4.2.1: Define programmatic governance and operational management for Destination Assurance

TIME HORIZON	RESOURCES	PARTNERS
Short Terrm (Years 1-3)	Contractor: J$3 million / US$20,000 Planning retreats: J$3 million / US$20,000	MOT, BJS

Priority Action 4.2.2: Establish mechanism for improved coordination and collaboration among co-managers and partners

Key actions for enhancing coordination and collaboration among MDAs that co-manage the mandatory tourism licensing process and play a role in the destination assurance certification programme should address three critical areas:.

Licensing Programme

- Establish a multi-MDA committee composed of designated point persons from each MDA which meets quarterly to discuss any emerging issues in licensing. Given increased cooperation between TPDCo and the Municipal Cooperation recently, the Municipal Cooperation can opt out of this arrangement.
- Host inter-MDA presentations on the licensing requirements for various MDAs.
    - This help all managers of the system better understand the role they play in the overall process and the impact of preventable delays on the efficient functioning of the system.
    - At a minimum, there should be a multi-ministerial/agency committee whose members communicate regularly and work together to reduce bottlenecks, improve processes and achieve shared goals.

- Develop training programmes for MDAs that explain the basic processes in place at other MDAs and the role they play in the overall licensing system.
    - Training should sensitize managers to common causes for delays and how this impacts the efficiency of the licensing system.
    - Training should be periodically updated to reflect current experience of entities.

Voluntary Standards & Certification Programme

- Establish a multi-stakeholder committee that will act as an objective body to oversee the Destination Assurance Certification Programme. This committee would include the following roles:
    - Programme manager/administrator, responsible for the day-to-day operations of the certification programme, such as fielding inquiries from interested enterprises, answering questions about the application process and incentives, directing applicants to available training resources, and communications throughout the life cycle of the certification procedures. This manager could be at a national level with TPDCo or at a destination level with RDMOs. Alternatively, this role could be filled by establishing a new organisation that is independent of any governmental bodies.
    - Certification body, responsible for the actual audit and verification procedures to ensure an applicant has met the minimum threshold for certification. This role would be responsible for providing corrective actions and direction on how to proceed after the audit is complete. It could be filled by NCBJ or an internationally accredited certification body.
    - Certification award committee, responsible for awarding the ecolabel once the certification body has verified that all conditions are met. This role would likely be filled by JTB, to tie the certification label to the Jamaica brand.

Programme Oversight

- Establish an oversight mechanism for monitoring the objectives of the Destination Assurance Certificate Programme at the ministerial level or at the level of the permanent secretaries. This mechanism would allow for frequent communication between MDAs, and would facilitate problem-solving so delays can be resolved more quickly and entities can minimise the costs associated with extended delays.
    - This will require partnership arrangements and coordination between multiple MDAs as well as public-private partnerships. Roles, responsibilities and coordination plans should be developed.
    - A new body could be established, or destination assurance could be included as a standing agenda item at the permanent secretaries Board meeting.
    - Relevant heads of agencies connected to tourism may be required to participate.

Coordination and collaboration mechanisms will also need to be put in place for the new ecosystem of partners that will be needed to roll out voluntary standards and certification.

Table 48: Priority Action 4.2.2: Establish mechanism for improved coordination and collaboration among co-managers and partners

TIME HORIZON	RESOURCES	PARTNERS
Short Term (Years 1-3)	Meetings and Coordination: J$1.5 million / US$10,000	MDA Partners

Objective 4.3
Establish a monitoring system that will facilitate continuous improvement

Priority Action 4.3.1: Develop a national level monitoring system for collecting visitor satisfaction from enterprises.

Invest in technology for capturing visitor satisfaction data by creating a mobile app to be used nationally.

- The app would list all licensed establishments, much like Trip Advisor. Each licensed business would have a unique QR code for easy look up. Visitors would be able to scan the code provided by the establishment to respond to a few satisfaction questions (two to four) and register enterprise-level feedback on a single platform.
- The highest performing businesses would receive greater promotion and the lowest performers would be offered support for making improvements.

Table 49: Priority Action 4.3.1: Develop a national level monitoring system for collecting visitor satisfaction from exit surveys and enterprises

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1 - 6)	Development of application and training: J$6 million / US$40,000	JTB, JHTA and other trade associations

Priority Action 4.3.2: Develop a national level monitoring system for climate change.

Develop a monitoring system which considers filling in large gaps in research around effects of the changing climate on the tourism industry, given the existential nature of this threat to the nation and the sector. Suggested actions in this area include:

- MOT should identify a representative to be on the committee and engage the external partners/agencies to provide competitive information on climate change monitoring.
- Conduct research on the impacts of weather events and other shocks to the tourism sector at the enterprise and destination levels (e.g., hurricanes, droughts and pandemics) to develop response plans and implement mitigation and adaptation measures.
- Conduct risk assessments and business impact analyses, identify critical infrastructure, and develop post-emergency communication systems and protocols so that enterprises can quickly re-establish essential functions.
- Develop a programme to monitor GHG emissions and establish protocols for measurement and reporting.

Table 50: Priority Action 4.3.2: Develop a national level monitoring system for climate change

TIME HORIZON	RESOURCES	PARTNERS
Short to Medium Term (Years 1 - 6)	Contractor: J$6 million / US$40,000	JTB, JHTA, MEGJC, NEPA

CHAPTER 4

IMPLEMENTATION

This chapter provides an overview of the priority actions and implementation details.



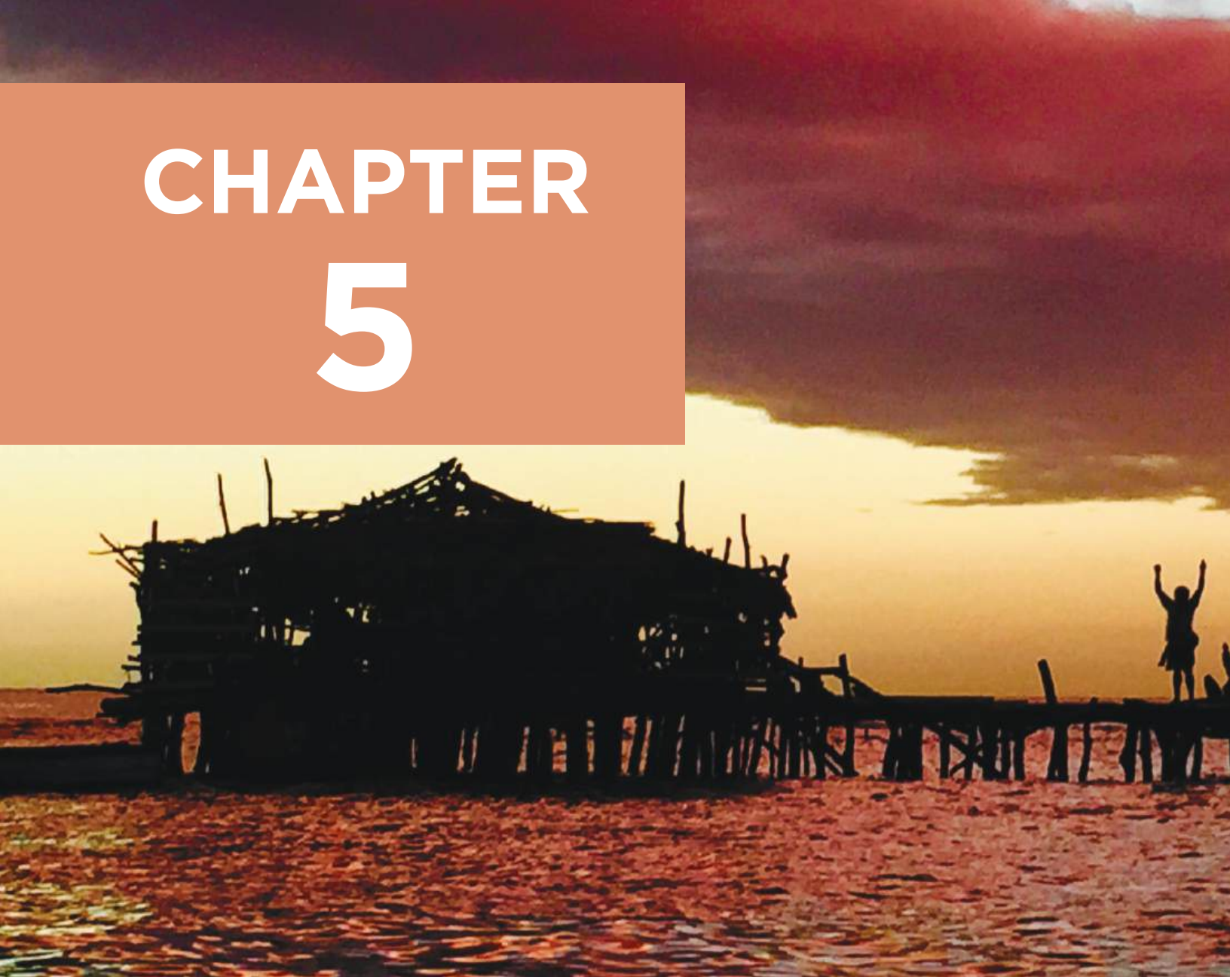
Table 51: National Destination Assurance Programme Implementation Plan

GOALS	OBJECTIVES	PRIORITY ACTIONS	TIME HORIZON	LEAD	SUPPORTING PARTNERS	BUDGET (JAD / USD)
1. Streamline the tourism licensing system	**1.1** Establish an integrated inspection process and cadre of inspectors.	**1.1.1** Form centralized and integrated cadre of inspectors.	Short Term (Years 1-3)	TPDCo	JCF, JFB, MOHW NEPA	$40 million / $266,666
		1.1.2 Revise licensing process to accommodate the integrated inspectors.	Short Term (Years 1-3)	TPDCo	MOHW, JCF, JFB, NEPA	$2.5 million / $17,000
	1.2 Synchronize duration of tourism licences and certificates/ permits which require inspections.	**1.2.1** Evaluate and harmonize the time horizon of licences and permits.	Short to MediumTerm (Years 1-6)	TPDCo	MOHW, JCF, JFB, NEPA	$1.5 million / $10,000
	1.3 Establish an automated system that will improve efficiencies.	**1.3.1** Put in place an automated system for enterprises to upload operational compliance documents.	Short Term (Years 1-3)	TPDCo	JTB, MOHW, JCF. JFB, NEPA, E-Gov	$153 million / $1.02 million
		1.3.2 Automate document gathering process.	Short Term (Years 1-3)	TPDCo	JTB, MOHW, JCF. JFB, NEPA, E-Gov	Cost presented in 1.3.1
		1.3.3 Automate field inspection process and reports.	Short to Medium Term (Years 1-6)	TPDCo	JTB, MOHW, JCF. JFB, NEPA, E-Gov	$900,000 / $6,000
	1.4 Encourage widespread compliance and consistent enforcement	**1.4.1** Promote tourism licensing improvements and encourage compliance.	Short to Medium Term (Years 1-6)	TPDCo	SMTE's, JHTA, Destination Assurance MDA partners	$13 million / $86,666
		1.4.2 Ensure that the licensing programme has effective enforcement of compliance and quality requirements.	Short Term (Years 1-3)	TPDCo	SMTE's, JHTA and other trade associations, MDA partners	Cost presented in 1.3.1
		1.4.3 Ensure that the licensing programme addresses systemic issues associated with enforcement of compliance.	Short to Medium Term (Years 1-6)	TPDCo	MDA partners	No additional cost

GOALS	OBJECTIVES	PRIORITY ACTIONS	TIME HORIZON	LEAD	SUPPORTING PARTNERS	BUDGET (JAD / USD)
2. Create a Destination Assurance Certification Programme that builds on the existing compliance framework for tourism enterprises	**2.1** Enhance all existing regulatory requirements for tourism enterprises	**2.1.1** Update regulatory and administrative requirements for tourism licensing.	Short to Medium Term (Years 1-6)	MOT, JTB, TPDCo	MDA partners, NEPA, ODPEM	$3 million / $20,000
	2.2 Establish voluntary standards for developing a quality management system	**2.2.1** Establish a quality management standard for tourism enterprises.	Short Term (Year 1)	JTB, TPDCo	BSJ, JHTA and other trade associations, SMTs	$3 million / $20,000
	2.3 Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern	**2.3.1** Establish internationally recognised standards that focus on sustainable tourism best practices.	Short Term (Years 1-3)	MOT, JTB, TPDCo	MOT, JTB, BSJ, NEPA, Municipal Corporation, MDA Partners	$8.8 million / $58,666
	2.4 Establish voluntary standards for product development	**2.4.1:** Establish product development standards that address authentic and high-quality experiences and products.	Short Term (Years 1-3)	TPDCo	JCTI, JNHT, UDC Craft Association	$7.3 million / $48,666
	2.5 Develop a Destination Assurance Certification Programme	**2.5.1** Establish a Destination Assurance Certification Programme Scheme.	Short Term (Years 1-3)	TPDCo	NCBJ, JTB, JCTI, JHTA and other trade associations	$9 million / $60,000
	2.6 Build capacity of enterprises to adopt quality, sustainability and product development standards	**2.6.1** Provide online training that supports adoption of new standards.	Short Term (Years 1-3)	TPDCo	JCTI, ODPEM, MOHW	$4.5 million / $30,000
		2.6.2:Raise awareness of locals and visitors about health, safety and security best practices.	Short Term (Years 1-3)	TPDCo	JCTI, ODPEM, JTB	$16 million / $106,666
3. Establish permanent, regional management of destination assurance	**3.1** Establish a destination stewardship standard.	**3.1.1** Develop national destination stewardship standard.	Short Term (Years 1-3)	TPDCo	BSJ, GSTC, DACs, NEPA	$9 million / $60,000
	3.2 Establish regional destination management organisations.	**3.2.1** Institutional strengthening of Destination Assurance Councils.	Short Term (Years 1-3)	TPDCo	DACs	$79 million / $106,666
		3.2.2 Establish regional destination management organisations.	Medium to Long Term (Years 4-10)	TPDCo/ JTB	JTB, Attorney General, DACs, destination stakeholders	$142.8 million / $112,000
	3.3 Expand the National Destination Assurance Programme to include certification of local destinations.	**3.3.1** Develop Destination Stewardship Toolkit and Technical Assistance Programme.	Short to Medium Term (Years 1-6)	TPDCo	DACs, local consultants	$49.5 million / $330,000
		3.3.2 Establish a destination certification system.	Medium Term (Years 4 to 6)	TPDCo	NCBJ, international certification bodies	$7.5 million / $50,000
		3.3.3:Promote widespread adoption of destination standard.	Short to Long Term: (Years 1-10)	TPDCo	Ministry of Finance, Ministry of Industry and Commerce, TEF, Financial institutions such EXIM Bank, Jamaica National among others	$13 million / $86,666

GOALS	OBJECTIVES	PRIORITY ACTIONS	TIME HORIZON	LEAD	SUPPORTING PARTNERS	BUDGET (JAD / USD)
4. Enhance shared management and monitoring of destination assurance	**4.1** Establish automated coordination systems and build capacity of MDAs for shared management and monitoring.	**3.3.1** Develop Destination Stewardship Toolkit and Technical Assistance Programme.	Short to Medium Term (Years 1-6)	TPDCo	DACs, local consultants	$49.5 million / $330,000
		3.3.2 Establish a destination certification system.	Medium Term (Years 4 to 6)	TPDCo	NCBJ, international certification bodies	$7.5 million / $50,000
		3.3.3 Promote widespread adoption of destination standard.	Short to Long Term: (Years 1-10)	TPDCo	Ministry of Finance, Ministry of Industry and Commerce, TEF, Financial institutions such EXIM Bank, Jamaica National among others	$13 million / $86,666
		4.1.1 Introduce an automated system for managing and monitoring destination assurance.	Short Term: (Years 1-3)	TPDCo	See Goal 1	See Goal 1
	4.2 Introduce a guidance document for the management of the National Destination Assurance Programme.	**4.2.1** Define programmatic governance and operational management for Destination Assurance.	Short Term: (Years 1-3)	TPDCo	MOT, BJS	$6 million / $40,000
		4.2.2 Establish mechanism for improved coordination and collaboration among co-managers and partners.	Short Term: (Years 1-3)	TPDCo	MDA partners	$1.5 million / $10,000
	4.3 Establish a monitoring system that will facilitate continuous improvement	**4.3.1** Develop a national level monitoring system for collecting visitor satisfaction from enterprises.	Short to Medium Term (Years 1-6)	JTB	JTB, JHTA and other trade associations	$6 million / $40,000
		4.3.2 Develop a national level monitoring system for climate change.	Short to Medium Term (Years 1-6)	TPDCo	JTB, JHTA, NEPA, MEGJC	$6 million / $40,000





CHAPTER 5

LEGISLATIVE & POLICY FRAMEWORK

This chapter outlines the legislative, policy and regulatory revisions proposed or underway that are needed to support Jamaica's National Destination Assurance Programme.

1. Enabling Environment for the DAFS

The DAFS will require a supportive enabling environment for it to achieve its full potential. Many MDAs play a critical role in the tourism licensing system. This section of the report identifies legislative and administrative changes that may be needed for the development of Jamaica's National Destination Assurance Programme. It outlines existing and new recommendations for amendments to legislation and regulations. The situational analysis report listed most, if not all, relevant legislation, regulations, policies and programmes that support destination assurance. Elements discussed here concern changes proposed by the lead ministry and its agencies and other MDAs. These recommendations are not exhaustive and as relevant recommendations emerge the MOT and partners, in consultation with the sector, should be open to addressing changes required.

A. Ministry of Tourism

1. Tourist Board Act - Existing Recommendations for Amendment

a) Institutional Recommendations

1. Repeal of River Rafting Act and transfer of functions to the Tourism Board Act thereby accepting the recommendations of the Public Sector Master Rationalization Plan of May 2, 2011.
2. Repeal of the Prescribed Areas Regulations of the Tourist Board Act which will support efficient licensing and monitoring of vending.
3. Amend the Tourist Board Act to address Tourism Product Development that will allow the JTB to appoint or contract an authorized agent and or authorized officer(s) to execute its product development function.
4. Address the Licensing Function in the amended Tourist Board Act that will appoint an authorized agent and authorized officer(s) to execute its licensing processing function.
5. Facilitate inspection of Tourism Enterprises and Appointment of Agents through appointing authorised officers to perform the duties in the amended act.
6. Define a Classification Scheme for recreational usage on inland water bodies to support principles of shared usage, water quality and satisfactory hydrology.
7. Amend the Tourist Board Act to include establishment of a Technical Committee that will review the applications.
8. Incorporate the Making of Regulations as a Board requirement to aid in the execution of its functions.

b) Proposed Definitions

Definitions have been proposed for the following:

1. "an Authorized Officer"
2. "an Authorized agent"
3. "Board"
4. "Director of Tourism" means the person appointed by the Minister as such
5. "an Organisation"
6. "advertising"
7. "Tourism promotion"
8. "an Event"
9. "Tourism product"
10. "Tourism product development"

c) Expansion of Definitions

The definitions of some words in the Act leave room for various interpretations and it is recommended that these key issues be clearly modified and expanded in keeping with International and Industry best practices. These terms include:

1. Tourist Accommodation
2. Hotel
3. Visitor Attraction
4. Tourism Enterprise
5. Tourist
6. Water sports Activities
7. Water-based Attraction
8. Owner and operator
9. Place of interest
10. Product Development and Tourism Product

d) Addressing Governance Issues

Key issues to be addressed include:

1. The Purpose of the Jamaica Tourist Board
2. The Functions of the Board of Directors
3. Disclosure of Interest
4. Duty of Care Responsibilities of the Board of Directors
5. The Responsibilities of the Director of Tourism
6. Political Activities
7. Prescribed Rates for employees' emoluments

e) Registration of Tourism Enterprises

Key issues include:

1. A registration certificate with an indefinite validity will be granted to new tourism enterprises
2. Registration of Visitor Accommodation and Attractions

f) Licensing of Tourism Enterprises

Key issues include:

1. Provisional Permit
2. Existing operators of accommodations and attractions who were never in possession of a tourist board licence
3. Duration of a Tourism Licence
4. Conditions for granting a Licence
5. Obligation of the Licensee
6. Definition of compliance
7. Obligation of the Licensing Authority
8. Schedule to the licence
9. Display of a licence
10. Duplicate, lost or stolen licence
11. Incapacitation, insanity of licensee
12. Death of licensee
13. Change of Company Directors/Share Holders
14. Cessation of business
15. Transfer of a Licence
16. Suspension and Revocation of an Operating Licence
    a) Closure "Shut Down" of illegal tourism enterprises
    b) Appeals
    c) Power of Search and Seizure
17. Offences

2. Tourist Board Act - New Recommendations for Amendment

a) Definitions

The DAFS presents new terms that will need to be defined in the Tourism Board Act. Inclusion of the working definitions for the following key terms associated to destination assurance should be considered:

1. "destination assurance"
2. "standards"
3. "certification"
4. "Destination stewardship"
5. "Quality standards" for tourism enterprises
6. "sustainability standards" for tourism enterprises
7. "Destination stewardship standard"

b) Duration of Tourism Licences

There is a need to consider further revisions to the duration of the tourism licence across tourism subsectors (discussed in great detail in Chapter 3, Section I: Streamline Tourism Licensing System, in subsections A. Introduction and B. Objectives) beyond the existing recommendations for amendment to the Tourist Board Act. Existing recommendations for amendment decrease the duration of a tourism licence for the accommodations subsector to fifteen (15) years; five years for tourism attractions and places of interest; two years for travel halts, water sports operator, tour operators, car rental operators and bike rental operators; one year for tourism contract carriage operator, craft vendors and other tourism enterprise employees. It is also notable that the enterprises with the smallest footprint and sometimes the least impacts have the licences with the shortest validity periods.

In comparison to international and regional case studies (see Chapter 1: Situation Analysis), the licence renewal period for the accommodations subsector is considerably longer than other countries. In the Caribbean region, countries often require hotels to renew their tourism licence on an annual basis. Even for voluntary standards the maximum duration is three years. It is being recommended that three year periods be considered for accommodations and two-year periods considered for all other categories. Any national destination assurance framework that emphasizes quality must consider mechanisms to monitor and hold entities accountable and thereby safeguard the brand promise to visitors.

c) Revision of Regulations to support stronger Penalties

The existing recommendations for amendment to the Tourist Board Act change the penalty thresholds detailed in the Tourist Board Act from maximum to minimum thereby enabling higher penalties that can be more commensurate to the nature of the infraction.

This recommended amendment is aligned to the recommendation outlined in this DAFS that calls for a revision of penalties and introduction of stiffer penalties that may increase compliance among tourism enterprises. Stakeholders flagged that need for higher penalties. See Chapter 3 (Section I: Streamline Tourism Licensing System, A. Introduction and B. Objectives) for detailed discussion of this recommendation.

d) Establishment of RDMOs

Effective and sustained management of destinations at the local level is paramount to destination assurance. The current structure established for managing destination assurance at a local level is the DAC. The current DAC structure is marginally effective due to a lack of consistency in functionality and effectiveness of the DACs. A more consistent and permanent regional destination management structure is needed to address these issues. While tourism governance is highly centralized in Jamaica, current and future industry demands require decentralization in order to ensure local destination quality, sustainability and competitiveness. Negative impacts and changes occur at a local level and are best managed at this level.

RDMOs are a long-term solution. RDMOs can be established at a Resort level. The RDMOs would fit within Jamaica's formal structure of tourism governance and be an integral part of the MOT. A phased approach to establishing regional destination management organisations is recommended to prepare for the structural and legislative changes that decentralization requires. See Chapter 3, Section III: Regional Management of Destination Assurance for more details about proposed RDMOs. Changes will be required to the Tourist Board Act as TPDCo is designated as an executing agency of the JTB to carry out the product development functions under Section 14 subsection (1) of the Tourist Board Act.

B. Tourism Product Development Company

1. Policy and Administrative Recommendation

a) Establishing an integrated cadre of inspectors

The establishment of an integrated cadre of inspectors that encompasses employees from all MDAs involved in the tourism licensing process will be critical to conducting on-site inspections in a more streamlined manner. The secondment of staff from MDAs to TPDCo will be critical for successfully executing this critical solution. These should be enacted through MOUs or similar appropriate instruments.

b) Harmonizing the expiration dates of certificates/permits granted by MDAs

The existing tourism licensing system requires that tourism enterprises provide certificates/permits from several MDAs to prove that health, safety and other requirements are met. When there are delays in issuing certificates/permits due to ill-timed inspections and other resource constraints, tourism enterprises are often unable to complete the TPDCo licensing process in a timely manner. Syncing the expiration dates of certificates/permits awarded by MDAs with the overall renewal licensing time frame for each subsector will eliminate unnecessary costs and inefficiencies. These changes could be achieved through bilateral agreements, such as MOUs and other administrative arrangements, between TPDCo and MDA partners.

c) New regulatory and administrative requirements for tourism enterprises

The Ministry of Tourism, the JTB and TPDCo will be required to enhance current administrative and programmatic functions to support the DAFS. These include ensuring existing compliance-based regulatory and administrative requirements include:

a) visitor satisfaction monitoring, and
b) management of environmental, health, security, climate and disaster risks for all subsectors.

Detailed recommendations and proposed requirements are outlined in Chapter 3, Section I: Streamline Tourism Licensing System of this DAFS document.

d) Ensuring more effective delivery of public services that impact tourism at the destination level

Establishing service level agreements or MOUs with key MDAs or other partners that provide critical direct or support services to the tourism sector will be important. This could include agreements around time for delivery of key services e.g. garbage collection by the NSWMA, enhanced JCF presence in key areas, approval time periods for permits approved by local authorities, among other considerations.

C. Ministry of Health and Wellness

The Quarantine Act, Public Health Act and Regulations, and the Health Services Act are the main legislative and governance frameworks for the programmes of the MOHW and its agencies. There are also obligations of the MOHW under the Emergency Powers Act and the Disaster Risk Management Act. The MOHW proposes to undertake the following in support of further strengthening of the governance framework:

1. Amendment of the Quarantine Act,
2. Finalisation of an International Health Regulations (IHR) Policy that may inform, among other things additional amendments to the Quarantine Act,
3. Development of an Emergency Medical Services policy and regulations to support the Health Services Act,
4. The development of a Resiliency Policy for the Health System.

It is recommended that the Public Health (Tourism Establishment) Regulations, 2000 be amended to address vector-borne diseases like dengue, biological disasters such as COVID-19, and also psychosocial support for tourists and workers.

Along with the aforementioned, the health and wellness management and monitoring framework will require the tourism sector to strengthen its support in timely reporting of key outbreaks and other health and safety conditions that are mandatory under the Public Health Law and Regulations and where possible, consider appointing a Health and Safety Committee at all tourism establishments.

Health related legislative, policy and administrative considerations for DAFS should also include an analysis of impact on Jamaica's medical services in general. The effect on emergency medical services that will need to be available to respond to tourism-related emergencies e.g. recreational injuries and diseases (physical, mental as well as drug related) and road accidents are among some of the considerations. Additionally, recent growth strategies to support build out of the cannabis industry could stretch the health ministry's resources as new regulations and considerations are developed for this niche area.

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D. Ministry of Economic Growth and Job Creation

Establish policies, guidelines and incentives to encourage prioritizing of environment and climate change issues e.g. encouraging adoption of Leadership in Energy and Environmental Design (LEED) for construction. Frameworks to strengthen access to affordable housing for tourism workers is also an imperative. The Housing Act of 1973 addresses a range of issues including housing for tourism workers. Large resort developments could also be incentivised to provide suitable affordable housing solutions for workers in close proximity. These will also impact functions of the Ministry of Local Government and Rural Development.

E. Ministry of Transport and Works

The Transport Authority has recommended that the law be amended to ensure that insurance companies provide adequate motor vehicle insurance coverage for passengers who suffer personal injury from motor vehicle accidents, to licensees. It is likely that in many instances the options for minimum insurance coverage are obtained which results in limited financing for passenger injury claims. It may be necessary to explore mechanisms to support the industry to access higher claim options or have the law amended to increase the minimum claims for the tourism sector.

F. Ministry of Labour and Social Security

The Ministry of Labour and Social Security (MLSS) plays a key role in the multi-sectoral disaster risk management process and Occupational Safety and Health requirements for workplaces in Jamaica. Their roles include leading the national Committee for Humanitarian Assistance, managing the relief process and promoting resilience building among vulnerable populations. The MLSS is the primary entity responsible for coordination of all welfare activities inclusive of shelter management, payment of emergency relief grants, household damage (welfare) assessment, and data gathering. The MLSS also provides oversight in relief clearance. Their efforts are mainly related to the tourism labour force where they are impacted.

The Ministry is piloting the adoption of a comprehensive and modern safety and health legislation, entitled the "Occupational Safety and Health (OSH) Act" which will establish health and safety standards for all workplaces and will inter alia repeal the Factories Act. The new legislation will establish health and safety standards for all workplaces. The objectives of the Bill include:

- The protection of workers and other persons against risks to their safety, health and welfare arising through the elimination or minimization of hazards and serious injury and risks arising from plant, substances and structures; and
- The promotion of safe and healthy workplaces through collaboration of all stakeholders in the workplace.

G. Ministry of Local Government and Rural Development

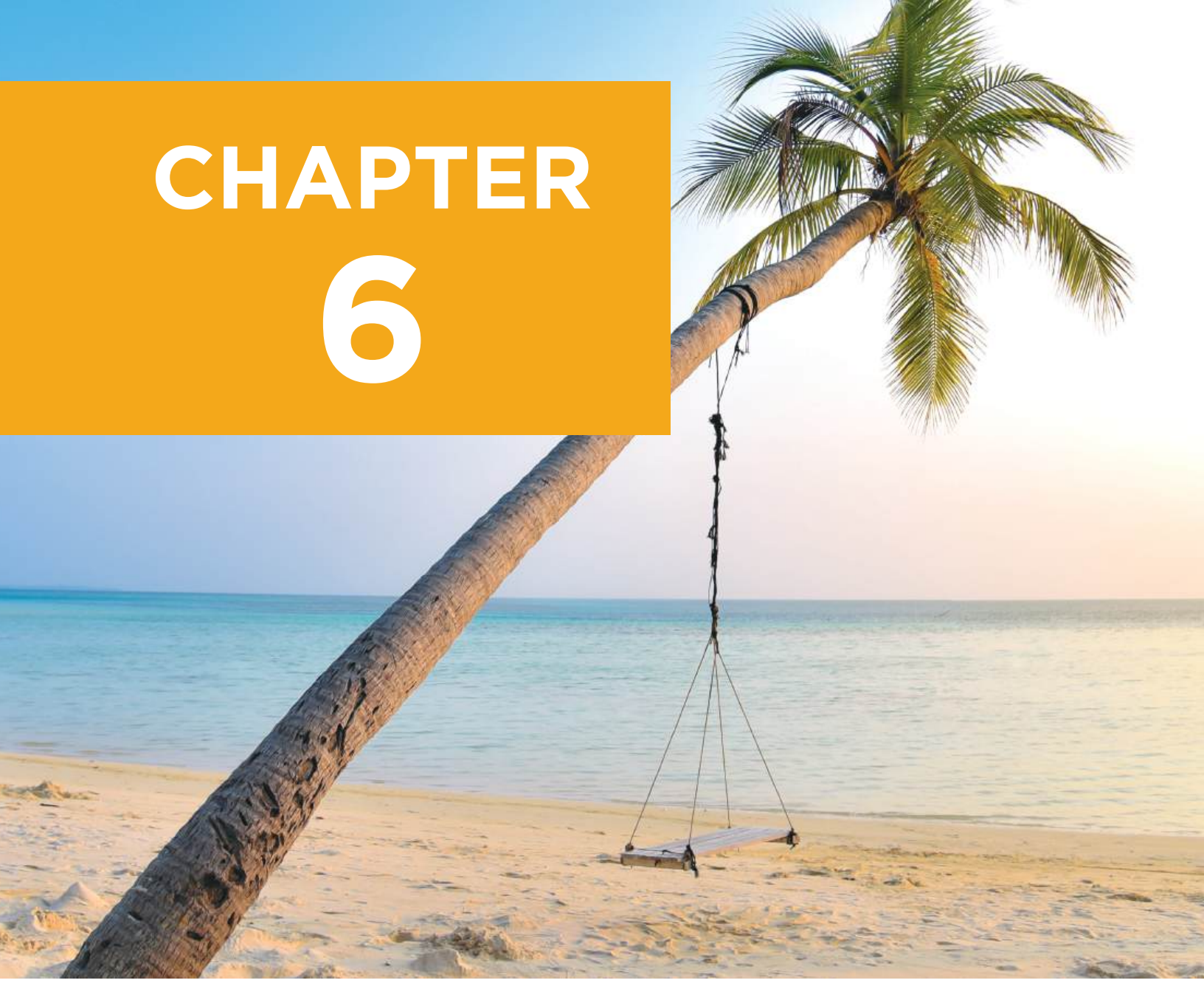
The Ministry of Local Government and Rural Development has portfolio agencies, such as the JFB, that are critical to the approval and quality management process for the tourism sector. There are no major legislative changes proposed at this time but it is suggested that greater support could be afforded the tourism sector in the areas of community and cultural tourism and strengthening involvement of SMTE's.

H. Other Recommendations

Ongoing legislative and policy reviews and amendments characterise any government-led system that seeks to continuously improve. This occurs at all stages along a continuum that spans from policy development to implementation regardless of the intended lifespan of the policy or framework.

There are current legislative and regulatory amendments that are close to being tabled and others that will occur in the future for tourism as well as other ministries that interact with tourism. MDAs that impact and influence destination assurance are therefore encouraged to establish mechanisms for ongoing evaluation of legislative, regulatory and operational gaps. The insights produced through this monitoring system can help ensure that these gaps are addressed so that they do not negatively impact the visitor experience.

The MOT should establish a mechanism for obtaining insights from the MDAs monitoring system in order to ensure ongoing evolution of the enabling environment that supports destination assurance. The insights obtained from the MDAs' gap analysis can also help MOT to identify needed programmes and initiatives that will support destination assurance. Bi-annual meetings to discuss gaps documented could be convened to support this process.



CHAPTER 6

MONITORING & EVALUATION FRAMEWORK

Monitoring and evaluation efforts will help to track implementation and outputs systematically, and measure the effectiveness of the DAFS that includes the National Destination Assurance Programme. It will help determine when the DAFS is on track and when changes may be needed. This chapter outlines the proposed monitoring and evaluation framework for the DAFS.



1. DAFS Monitoring Framework

First it is important to monitor and evaluate the effectiveness of the proposed DAFS provided here within. The DAFS has provided goals, objectives, and outcomes which are the backbone of the monitoring and evaluation framework. Tracking implementation and the impacts of destination assurance can ensure that the MOT and TPDCo are meeting their intended outcomes. The DAFS should be evaluated on a scheduled and regular basis.

Evaluation efforts should encompass: the tourism licensing process, new standards and capacity building, certification and overall management of Jamaica's National Destination Assurance Programme. The review should consider all applicable stakeholders such as enterprises, destinations, and MDAs. Table 52 presents indicators that can be used to monitor the implementation of the DAFS.

Table 52: DAFS Action Item Monitoring Framework

INTENDED IMPACT: Overall visitor satisfaction will improve and the number of return visitors will increase. This will result in increases in tourism revenue that is used to improve the quality of life for residents.

GOALS	OBJECTIVES	OUTCOMES	INDICATORS
1. Streamline the tourism licensing system	**1.1** Establish an integrated inspection process and cadre of inspectors. **1.2** Synchronize duration of tourism licences and certificates/permits which require inspections. **1.3** Establish an automated system that will improve efficiencies. **1.4** Encourage widespread compliance and consistent enforcement	Increased compliance among tourism enterprises Tourism enterprises will have more available time to focus on continuous improvement	Percentage of enterprises in compliance (overall, by sector) Percentage of enterprises with access to the automated platform Number of inspectors dedicated to compliance licensing and COVID certification Number of required inspections per year required for JTB licence (by sector) Estimated time period of application process to obtain/renew JTB licence (by sector)
2. Create a Destination Assurance Certification Programme that builds on the existing compliance framework for tourism enterprises	**2.1** Enhance all existing regulatory requirements for tourism enterprises **2.2** Establish voluntary standards for developing a quality management system **2.3** Establish voluntary standards to address internationally accepted sustainable tourism practices and Jamaica-specific issues of concern **2.4** Establish voluntary standards for product development **2.5** Develop a Destination Assurance Certification Programme **2.5.1** Establish a Destination Assurance Certification Programme Scheme. **2.6** Build capacity of enterprises to adopt quality, sustainability and product development standards	Culture of continuous improvement instilled in tourism enterprises Widespread adoption of internationally accepted best practices for quality and sustainability among tourism enterprises	Percentage of enterprises which have accessed the Quality Management System Standard & Training (overall, by sector) Percentage of enterprises which have accessed the Sustainability Standards & Training (overall, by sector) Percentage of enterprises which have accessed the Product Development Standards & Training (overall, by sector) Percentage of enterprises which have applied for certification (overall, by sector) Number of trainings, public awareness campaigns, and other engagement activities per year related to Destination Assurance

GOALS	OBJECTIVES	OUTCOMES	INDICATORS
3. Establish permanent, regional management of destination assurance	**3.1** Establish a destination stewardship standard. **3.2** Establish regional destination management organisations. **3.3** Expand the National Destination Assurance Programme to include certification of local destinations.	Improved management of destinations through RDMOs responsible for placemaking and destination stewardship	Number of RDMOs implementing the Destination Stewardship Standard Number of RDMOs certified Number of Destination Assurance initiatives put in place by RDMOs
4. Enhance shared management and monitoring of destination assurance	**4.1** Establish automated coordination systems and build capacity of MDAs for shared management and monitoring. **4.2** Introduce a guidance document for the management of the National Destination Assurance Programme. **4.3** Establish a monitoring system that will facilitate continuous improvement	Destination assurance activities are integrated into operations of all relevant management bodies such as MDAs, DAC's (and eventually RDMOs) and trade associations	Number of TPDCo staff dedicated to managing Destination Assurance Visitor satisfaction indicators improving Repeat visitors indicators increasing Tourism revenue indicators increasing Tourism workforce indicators improving Quality of life indicators improving

2. National Destination Assurance Programme M&E Framework

Additionally, it is suggested that a long-term Monitoring & Evaluation (M&E) Framework be developed for the National Destination Assurance Programme that considers enterprise, destination, and management performance across a variety of indicators and takes both the compliance and voluntary programmes into account. Key considerations are outlined below.

- Monitoring: Ongoing, focused on the process and activities. The M&E Framework will need to account for the performance of the programme in general as well as the broader outcomes and impacts for the community and visitor satisfaction with destination assurance. A full series of performance indicators should be defined to help measure the destination assurance programmatic outcomes and impacts. This will include (but are not limited to): visitor satisfaction and effectiveness of compliance programme and associated standards (and certification programme if developed).

- Evaluation: Periodic, focused on the outcomes and impacts of activities. The M&E Framework should also include the development and evaluation of a Continuous Improvement Plan that directs specific activities for M&E. The plan would set long-term goals and targets related to improvement milestones which should be tracked on a regular basis. This plan should include enterprise, destination, and programmatic indicators.

1. National Destination Assurance Programme - Enterprise Performance Indicators

- Compliance programme: inputs, activities, outputs
- Voluntary quality programme: inputs, activities, outputs
- Voluntary sustainability programme: inputs, activities, outputs
- Voluntary certification programme: inputs, activities, outputs
- Capacity-building programmes: inputs, activities, outputs

2. National Destination Assurance Programme - Destination Performance Indicators

- DAC/RDMO engagement: inputs, activities, outputs
- Destination stewardship improvements: inputs, activities, outputs
- Voluntary certification programme: inputs, activities, outputs
- Capacity-building programmes: inputs, activities, outputs

3. National Destination Assurance Programme - Programme Performance Indicators

- Visitor satisfaction
- Return visitors
- Tourism revenue

4. National Destination Assurance Programme - Outcome/Impact Indicators

- Global recognition
- Quality of life



CHAPTER 7

COMMUNICATIONS GUIDELINES

This chapter presents strategic guidance for the design of strategic and tactical communications targeting tourism enterprises and destinations that will support the launch and implementation of Jamaica's National Destination Assurance Programme.



1. Introduction

Table 53: DAFS Communications Goals and Objectives

GOALS	OBJECTIVES
5. RAISE AWARENESS AND SECURE BUY-IN AMONG PRIVATE SECTOR AND DESTINATION DECISION MAKERS FOR THE NATIONAL DESTINATION ASSURANCE PROGRAMME	5.1 Develop a communications action plan. 5.2 Implement an change communications programme. 5.3 Measure and evaluate impact/results.
GOAL 5 INDICATORS 5a. Participation of private sector and destination managers in the National Destination Assurance Programme. 5b. Strong DAFS brand identity within the tourism industry.	

Like all global superbrands, Jamaica's tourism appeals primarily to the heart, arguably of host and visitor alike, who benefit from a destination renowned for its breath-taking beauty, and as an exciting escape for one-of-a-kind experiences that are a mix of rugged adventure, dream holiday packages and the world's most congenial hospitality service workers.

These remarkable attributes are important considerations for the design of a comprehensive communications action plan to support the National Destination Assurance Programme's key goal of achieving widespread adoption to quality and sustainability standards among tourism enterprises and destinations.

From a strategic communications perspective, the DAFS is an ideal policy tool to enhance the quality and sustainability of Jamaica's tourism product by introducing industry standards that can help to inspire a sense of ownership among key stakeholders and among Jamaican citizens and residents to embrace the responsibility for the long-term viability and performance of the nation's most vital industry.

The communications approaches outlined in this section of the DAFS document can be used to guide and inform the development of a DAFS communication action plan.

2. Guidance for Strategic Communications

The DAFS will be implemented at a time of unprecedented change and upheaval in the world due to the global pandemic. It is therefore imperative that the Ministry of Tourism utilize strategic communications to manage the change process, minimise resistance and secure buy-in for the National Destination Assurance Programme in the new operating environment. Strategic communications can be used to:

- Inspire tourism enterprises to become innovators by instilling a culture of continuous improvement in their operations and champions of social responsibility and respect for the environment in word and deed.
- Enlist the wider tourism industry, destination communities and destination managers to become supporters and champions of destination stewardship.

Strategic communications for encouraging change in operating practices of tourism enterprises and local destinations will need to framed within an industry-wide change management process that positions DAFS as an innovation that can help to consolidate and build on Jamaica's iconic status as a global tourism brand; while influencing behavioural change on the part of tourism enterprises, destination tourism decision-makers (internal stakeholders), as well as members of the public (external stakeholders).

[98] *Definition adopted in June 2017 by* ***INetQI,*** *a network of these international bodies: BIPM, IAF, IEC, ILAC, ISO, ITC, ITU, OIML, UNECE and UNIDO and the World Bank.*

The strategic communications action plan will need to integrate all aspects of the DAFS Quality Infrastructure (QI). QI refers to "a system consisting of organizations (public and private), policies, relevant legal and regulatory framework, and practices needed to support and enhance the quality, safety and environmental soundness of goods, services and processes."[98] The communications messaging for DAFS can be championed by the Ministry of Tourism to fulfil the "brand promise to visitors that assures authentic Jamaican experiences, and a seamless, safe, secure, and sustainable stay".

Strategic communications for the DAFS also needs to consider the basic steps involved in change management. Change management is defined as a structured approach for supporting individuals and organisations during periods of transition. The DAFS communications action plan will need to include messaging for all stages of the change management process:

1. Creating urgency for adoption of a destination assurance framework and strategy
2. Forming a powerful coalition between public and private sector
3. Creating a shared vision for change that is based on the DAFS document
4. Communicating the vision to tourism industry and destination decision makers stakeholders
5. Managing through the challenges outlined in the DAFS document
6. Creating short-term wins based on the recommendations outlined in the DAFS document
7. Building on the change, and,
8. Anchoring the change into the operating practices of tourism enterprises and destination managers.

The DAFS communications action plan will also need to develop differentiated messages for key target audiences: tourism enterprises and local destinations. Table 53 presents the audience-messaging matrix that maps audiences with messages for promoting the National Destination Assurance Programme. These messages could be pushed out through a mix of direct and mass media messaging via traditional and social media channels.

Table 54: Audience-Messaging Matrix

KEY AUDIENCES	KEY MESSAGES	OUTCOMES
Naysayers/Detractors: Tourism industry skeptics and commentators, Environmental activists.	'Jamaica's tourism is investing in more robust environmental standards under a QI framework.	Greater Jamaica tourism brand equity.
Neutral/Uncommited: MDAs, Media (local and travel), Key opinion leaders, Private Sector groups, General Public, Diaspora, **USERS-Tourism Enterprises.**	'Care for the National Tourism Asset'; 'Enjoy today, leave an enduring legacy for the future.'	National groundswell for the value of Jamaica's tourism industry beyond the resort areas.
Innovators: USERS-Tourism enterprises, Tourism industry groups and workers, Entertainment industry, tour operators, farms, artisans, transportation, etc.	'Scale up to Work Class Standards' 'World-class Quality gives Jamaica a competitive edge in the COVID environment.'	Optimised compliance with new DAFS standards and procedures. Enhanced service delivey.
Champions: HM Bartlett, MOT, TPDCo, JTB, Law Enforcement, National Standards Bodies, International Quality Assurance Bodies, IDPs, Tourism organisations, etc.	'Let's live the *brand promise: an authentic Jamaican experience, and a seamless, safe, secure, and sustainable stay for all our visitors.*'	Greater national inspiration around the tourism brand esp. in local destinations that are central to Jamaica's brand

In formulating the communications action plan that will target tourism enterprises and destination decision makers, there are two key communications components with attendant priorities and key actions to consider, namely, behavioural change through stakeholder education, and awareness building and visibility among tourism enterprises and destination decision makers. The overarching guidelines for DAFS strategic communications are outlined below. Communications should be:

- Proactive, engaging and practical.
- Open, honest and above all, accurate. This is critical given the far-reaching goals of the DAFS.
- Aligned with the DAFS. There should be emphasis on identifying and building credible messengers for the articulation of all messaging.
- Designed to attract attention and encourage action (call to action) that will help to build trust and confidence in DAFS.

GLOSSARY OF TERMS

A

Accreditation

Awarded to programmes that cover Occupations Standards and "benchmark" curricula. (CROSQ) "Voluntary process through which an organization is able to measure the quality of its services or products and their performance relative to recognized standards." (UNWTO, 2017)

Authenticity

Webster's dictionary defines authenticity as "being actually and precisely what is claimed." "In a tourism setting, authenticity refers to tourists' personal evaluation of the extent to which their expectations from a destination hold true during a visit." (Ramkissoon & Uysal, 2011)

C

Certification

"A mark of objective verification of compliance. Based on the recognised standards/codes of practice and combines experience, knowledge, and skill attainment." (CROSQ)

"Process through which a duly accredited entity confirms the capacity of a company or product to meet the requirements of a standard." (UNWTO, 2017)

Compliance

"Having a valid certification in health, fire safety and public liability and other permits licensed from time to time; adherence to the Tourist Board Act and Regulations; adherence to the schedule of the Licence; and adherence to any other terms and conditions of the licence." (JTB, 2020)

Conformity Assessment Procedures

"Any procedure used, directly or indirectly to determine that relevant requirements in technical regulations or standards are fulfilled." (CROSQ)

D

Destination

"A physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. A destination incorporates various stakeholders and can network to form larger destinations. It is also intangible with its image and identity which may influence its market competitiveness." (UNWTO, 2019)

Destination Assurance

Jamaica's brand promise to visitors that assures an authentic, safe and seamless experience which is respectful towards the community and environment.

Destination Management Organisation

"The leading organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates tourism sector partnerships towards a collective destination vision. The governance structures vary from a single public authority to a public/private partnership model with the key role of initiating, coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing and convention bureau activities." (UNWTO, 2019)

O

Occupational Safety And Health Standard

"a standard which requires conditions, or the adoption or use of one or more practices, means, methods, operations, or processes, reasonably necessary or appropriate to provide safe or healthful employment and places of employment." (U.S. Occupational and Health Safety Act, 1970)

Q

Quality

"The degree of value or excellence of a product or service; can sometimes refer to a high leve of value or excellence." (GSTC, 2021)

Quality Assurance

"A set of planned and systematic activities applied to a quality system in order for the quality requisites of a product or service to be satisfied." (UNWTO, 2017)

Quality Management

"Range of management activities, performed as general functions, that determine quality policy, objectives and responsibilities in the context of a quality system." (UNWTO, 2017)

Quality Management System

"Series of coordinated activities relating to the set of elements (resources, procedures, documents, organizational structure and strategies) required to achieve quality in products or services." (UNWTO, 2017)

R

Resilience

"The ability to recover quickly from difficulties, to spring back or recover from misfortune or disaster. Tourism businesses and destinations face resilience challenges, they need to be adaptive.

- over-dependence on one source market or company - for example, Thomas Cook link
- recession, over-dependence on tourism, in the Caribbean tourism, accounts for 40% of GDP and 13.4% of employment.
- health issues and pandemics Sars
- extreme weather - typhoons, hurricanes, heat waves, droughts, fire, flood
- climate change and rising sea levels more
- man-made disasters, pollution, beach closures
- overtourism
- terrorism

Risk Management

"The identification, analysis, assessment, control, and avoidance, minimization, or elimination of unacceptable risks." (GSTC, 2021)

S

Seamlessness

Seamlessness is an integral element of Jamaica's destination assurance concept. It refers to the integrated delivery of quality, safety and sustainability throughout the tourism value chain and visitor experience.

Standards

"Approved guidelines, rules, or characteristics (Including terminology, symbols, packaging, marking or labelling), for products or related processes and production methods, that provide for common and repeated use." (CROSQ, n.d.)

Sustainability

"Using resources in an environmentally responsible, socially fair and economically viable manner, so that by meeting the needs of current users, the possibility of their use by future generations is not compromised." (GSTC, 2021)

Sustainable Tourism

"Sustainable tourism 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 should make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity; respect the sociocultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to intercultural understanding and tolerance; ensure viable, long-term economic operations, providing socioeconomic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation." (GSTC, 2021)

T

Technical Regulations

"Specify product characteristics or their related processes and production methods, including applicable administrative provisions, terminology, symbols, packaging, marking or labelling requirements." (CROSQ)

Tourism Enterprise

"An establishment that provides one or more services, facilities, or products to attract or facilitate visitors. Tourism enterprises can fall within the category of: Accommodation; Attractions; Tour Services: includes tour operating business and tours guiding; Ground Transportation: includes Contract Carriage as defined in part 3 of the Road Traffic
Act, Automobile Rental, Bike Rental; Craft markets/craft villages; Travel Halts; Places of Interest; Aquatic/Water-based Attraction; and Water sport operations. A tourism enterprise can also be any other service related or not to those previously listed; as well as being any other services utilized by or offered to tourists and declared by the Minister, by order." (JTB, 2020).

Tourism Licensing

Process that involves a tourism enterprise's submission of key documents to fulfil compliance requirements and obtain permits issued by government agencies to be legally registered to operate and conduct business for various tourism subsectors. All tourism entities are required to be in possession of a Tourist Board licence.

V

Visitor Safety and Security

"Security and safety has become a complex multidimen-sional notion with a wide range of components belonging to it: political security, public safety, health and sanitation, personal data safety, legal protection of tourists, consumer protection, safety in communication, disaster protection, environmental security, getting authentic information, quality assurance of services etc.." (Kôvári & Zimányi, 2011)

Visitor Satisfaction

"The satisfaction of all tourism product and service needs, requirements and expectations of the consumer at an acceptable price, in conformity with mutually accepted contractual conditions and the implicit underlying factors such as safety and security, hygiene, accessibility, communication, infrastructure and public amenities and services. It also involves aspects of ethics, transparency and respect towards the human, natural and cultural environment." (UNWTO, 2019)



Ministry of Tourism

