

# NATIONAL DESTINATION ASSURANCE FRAMEWORK & STRATEGY



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**Prepared By:** Seleni Matus, Robert Chappell,  
Sherida Powell, Ph.D., Elecia Myers, Michael Taylor, Ph.D.,  
Jenna Blackwood, Ph.D., Rose-Ann Smith, Ph.D.

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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<sup>1</sup>. 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.<sup>2</sup> 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.<sup>3</sup>

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.<sup>4</sup> 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 purposes of this policy document and 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<sup>5</sup>. 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.

<sup>1</sup> World Travel & Tourism Council. (2020, March) Jamaica 2020 Annual Research: Key Highlights. <https://wtcc.org/Research/Economic-Impact>.

<sup>2</sup> Statistical Institute of Jamaica. [https://statinja.gov.jm/Tourism Satellite Accounts - National Income and Production Tables, 2019](https://statinja.gov.jm/Tourism%20Satellite%20Accounts%20-%20National%20Income%20and%20Production%20Tables,%202019)

<sup>3</sup> 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>.

<sup>4</sup> 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](https://www.researchgate.net/publication/313655981_Application_of_Standardized_Quality_Policy_Quality_Assurance_of_Tourism_Products).

<sup>5</sup> 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

STRENGTHS	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. 1.4.3 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 in 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

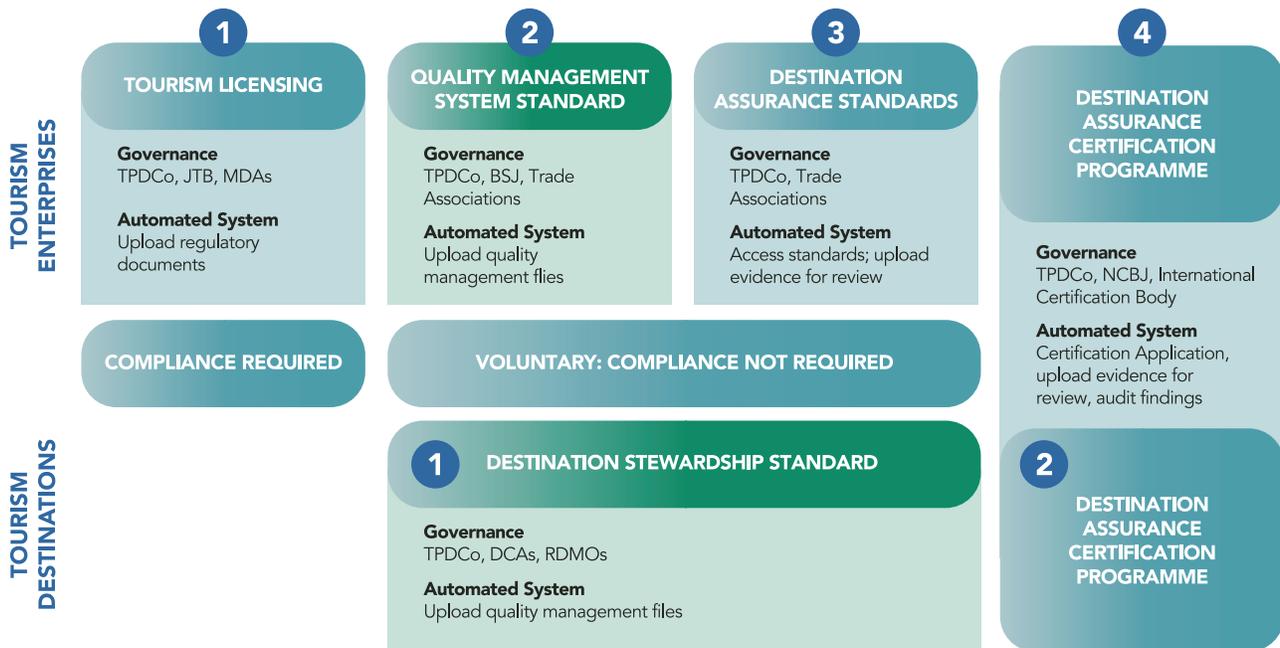
GOALS	OBJECTIVES	PRIORITY ACTIONS
3. ESTABLISH PERMANENT, REGIONAL MANAGEMENT OF DESTINATION ASSURANCE	3.1 Establish a destination stewardship standard.	3.1.1: Develop national destination stewardship standard.
	3.2 Establish regional destination management organisations.	3.2.1: Institutional strengthening 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.
<p><b>GOAL 3 INDICATORS</b></p> <p>3a. Number of RDMOs implementing the Destination Stewardship Standard</p> <p>3b. Number of RDMOs certified</p> <p>3c. Number of Destination Assurance initiatives put in place by RDMOs</p> <p>3d. RDMOs are established, have dedicated budgets and core personnel</p>		
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.
<p><b>GOAL 4 INDICATORS</b></p> <p>4a. Number of TPDCo staff dedicated to managing Destination Assurance</p> <p>4b. Visitor satisfaction indicators improving</p> <p>4c. Repeat visitors indicators increasing</p> <p>4d. Tourism revenue indicators increasing</p> <p>4e. Tourism workforce indicators improving</p> <p>4f. Quality of life indicators improving</p>		

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 policy document 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

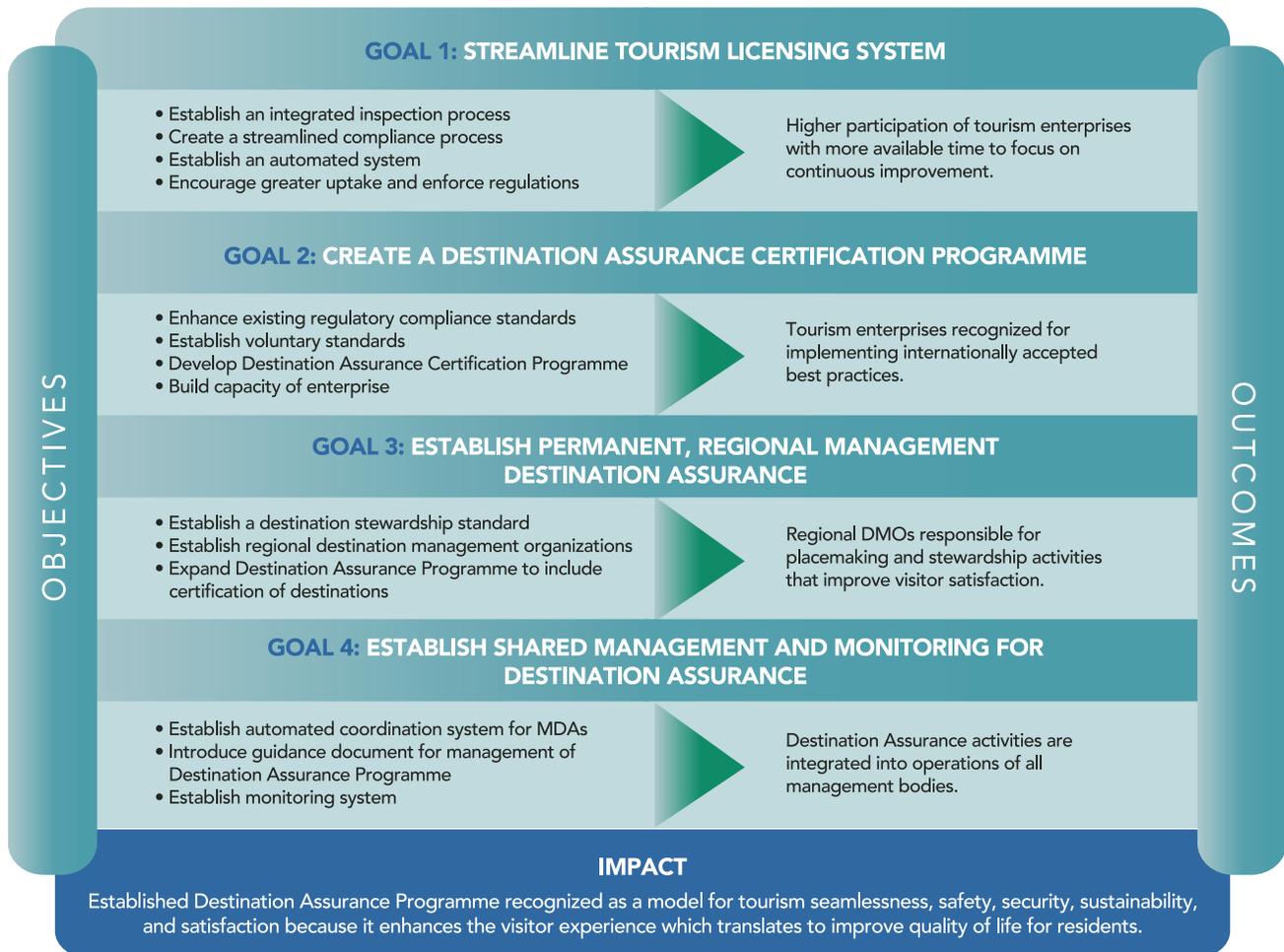
OBJECTIVES	PRIORITY ACTIONS	TIME HORIZON	LEAD	SUPPORTING PARTNERS	BUDGET (JAD / USD)
1.1 Establish an integrated inspection process and cadre of inspectors.	1.1.1 Form centralized and integrated cadre of inspectors.	Short Term (Years 1-3)	TPDCo	JCF, JFB, MOHW NEPA	\$40 million / \$266,666
	1.1.2 Revise 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, MHURECC	\$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	<p>... builds the capacity of tourism enterprises and local destinations to meet and exceed visitor expectations through delivery of quality tourism products, services and experiences.</p> <p>... 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.</p>

GUIDING TENETS	DESTINATION ASSURANCE
Social Responsibility	... 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	<ul style="list-style-type: none"> <li>• Leadership Commitment</li> <li>• Communication Protocols</li> <li>• Operations Manuals</li> <li>• Workforce Training</li> <li>• Performance Monitoring</li> </ul>	<ul style="list-style-type: none"> <li>• Regional destination management organizations or destination stewardship standard</li> <li>• Stakeholder Engagement</li> <li>• Strategic Plan</li> <li>• Planning Regulations</li> <li>• Performance Monitoring</li> </ul>
Health, Safety and Security	<ul style="list-style-type: none"> <li>• Compliance</li> <li>• Workforce Welfare</li> <li>• Visitor Welfare</li> <li>• Access to Medical Services</li> <li>• Secure Facilities</li> <li>• Transparent Reporting of Crime</li> </ul>	<ul style="list-style-type: none"> <li>• Health, Safety, and Security Assessments Public Health Regulations and Guidelines</li> <li>• Tourism Security Plan</li> <li>• MDA Coordination</li> </ul>
Resilience	<ul style="list-style-type: none"> <li>• Risk &amp; Resilience Assessment</li> <li>• Emergency Response</li> <li>• Disaster Recovery</li> <li>• Climate Adaptation</li> <li>• Business Continuity</li> </ul>	<ul style="list-style-type: none"> <li>• Land Use Regulations</li> <li>• Tourism Regulations</li> <li>• Social Safety Nets</li> </ul>
Sustainability	<ul style="list-style-type: none"> <li>• Natural &amp; Cultural Heritage Preservation</li> <li>• Environmental Resource Conservation</li> <li>• Economic Benefits to Community</li> <li>• Engagement, Education, Experiences</li> <li>• Equity, Inclusion, Accessibility</li> </ul>	<ul style="list-style-type: none"> <li>• Asset Protection</li> <li>• Visitor Use Management</li> <li>• Heritage Regulations</li> <li>• Environmental Regulations</li> <li>• Placemaking</li> </ul>

## 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 Policy Document

This DAFS policy document 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 policy document 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 (MICA), 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	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.
	9 DAFS Steering Committee members	

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