



**JAMPRO**  
TRADE & INVESTMENT JAMAICA

SHOVEL READY  
**TOURISM**  
**INVESTMENT**  
OPPORTUNITIES



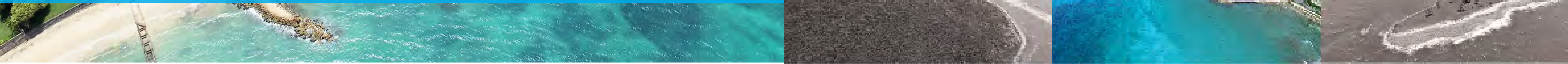




# SHOVEL READY TOURISM INVESTMENT OPPORTUNITIES

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# Country Overview

**J**amaica has prime commercial real estate coupled with a thriving tourism sector that generates over US\$2 billion yearly. Our northern and southern coastlines are strewn with pristine beachfront properties which attract over 2 million new and returning stopover visitors and over 1 million cruise passengers annually who spend an average of US\$2 billion.

Tourism investments increased in 2014 and 2015 and new investments are in the pipeline for 2016 with the announcement and commencement of new projects across the island. International brands such as the Hyatt (Ziva and Zilara), Azul Sensatori Hotel and Royalton completed construction of hotels during 2014. The Moon Palace Resort which replaced the Jamaica Grande at an investment of US\$150 million had a soft opening in July of 2015 while the other major project for 2015, Courtyard Marriot was opened in November 2015.

Notwithstnading, there is still a growing demand for hotel and villa accommodation for both high and middle end travelers. The Jamaican Tourism Master Plan indicates that guest houses, villas and apartments represent a huge under-utilized asset for the industry.

The National Growth Agenda of Jamaica identifies tourism as a key sector for development, hence, the thrust to promote available prime lands in tourist areas as "shovel ready" invest-

ment opportunities.

The Shovel Ready Investment Programme (SRIP) aims to identify both public and privately owned lands that are appropriate for tourism development in order to fast-track the development approvals process for these properties. The Programme is now in its second year and so far, 16 properties have been identified for participation. These properties are on the north coast, south coast and at least one on the east coast of the island. Some are to be subdivided and the development opportunities they present are varied. Some are sprawling beachfront properties and others have distinct potential for beach enhancement or development to increase their attractiveness and value. Some are immediately suited to fill the 3-4-star gap in hotel accommodation and others will naturally filter into the high-end tourism resort product, based on their location.

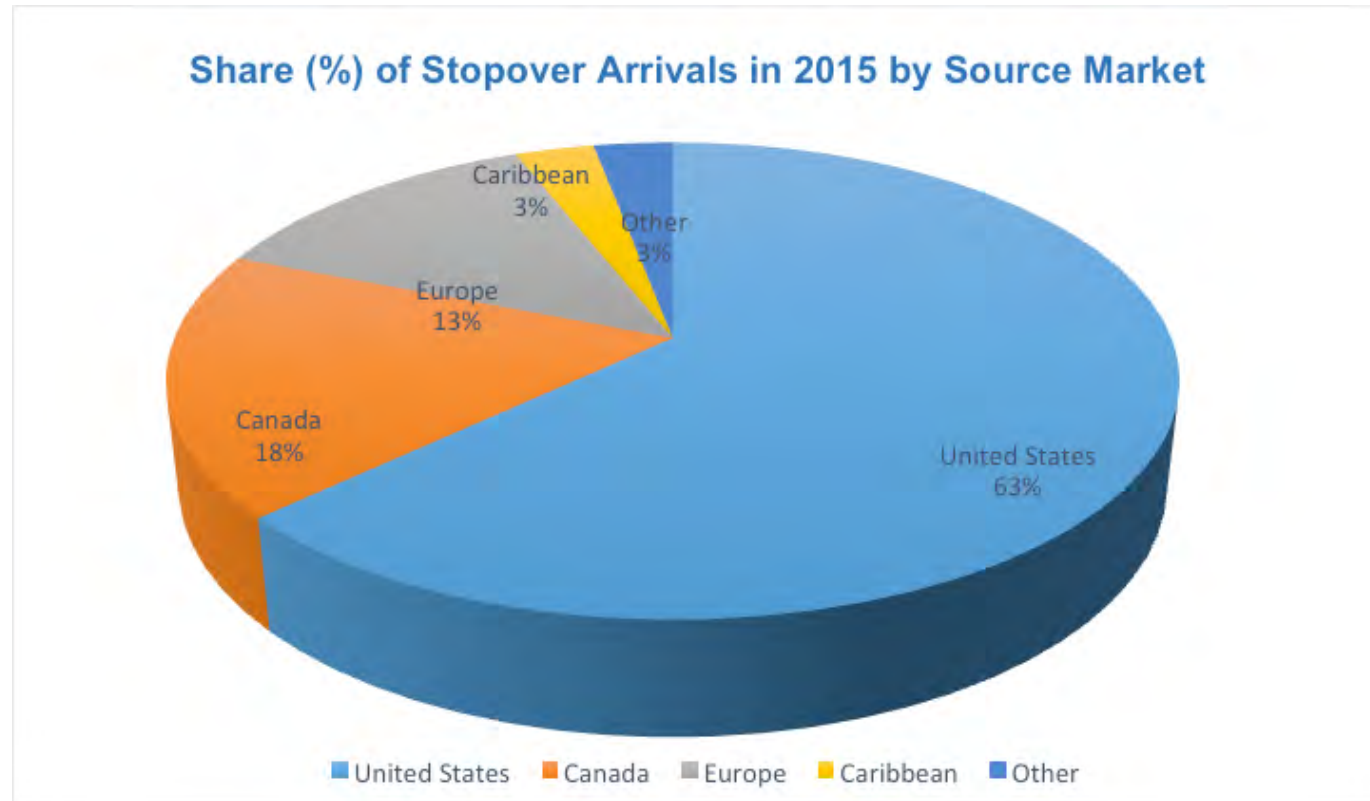
This promotional magazine provides you with a close-up look at the properties. It also offers a thorough guide on the surrounding economic factors that are conducive for investing in Jamaica.





# Tourist Arrivals

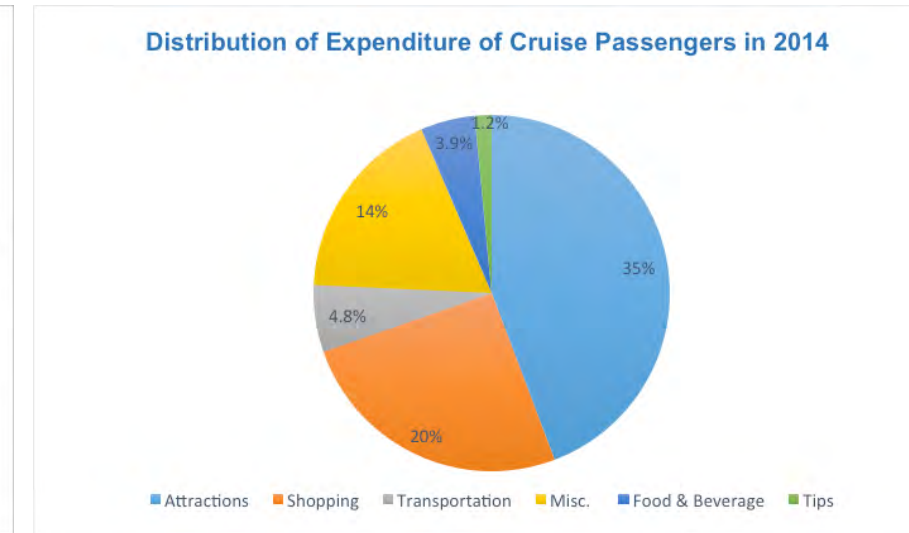
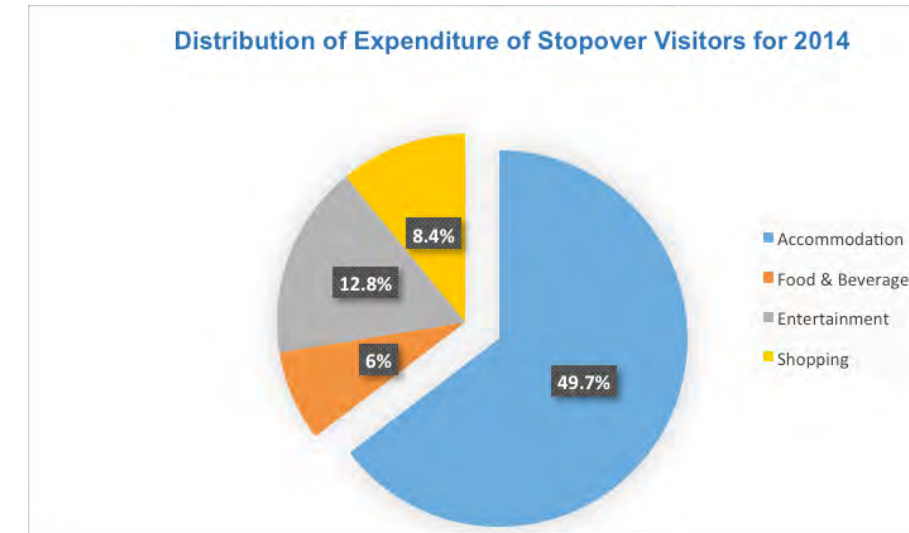
**J**amaica has seen a steady increase in stopover visitors to our coast between 2004 and 2015, with all of 61.3% coming from the United States. There has also been a steady climb since 2010, in the number of visitors coming from Canada. Lining up behind these two top markets, are the United Kingdom and the rest of Europe. See appendix 2 for details of stopover arrivals.



# Tourist Expenditures

**T**ourism continues to be Jamaica's second largest earner of foreign exchange. The annual travel earnings alone is approximately US\$2.2 billion. In 2004, total tourist expenditure was US\$1.4 billion. By 2014, this amount increased by a whopping 36%. See Appendix 3 for more information.

The Accommodation sector, however, is the biggest slice in the expenditure pie for stopover visitors, followed by Entertainment, Transportation and Shopping and Food and Beverage. Cruise passengers on the other hand, spend most of their money on attractions when they come ashore.





# Airlift & Connections

**J**amaica boasts three international airports, served by most of the world's major airlines. Regionally, Jamaica has the fourth highest number of passengers and flights coming in from the United States. In 2014, Jamaica hosted twenty nine (29) airlines servicing travelers from the Caribbean, Europe, Latin and Central America, Canada and the United States; thereby serving over 50 source markets in total.

More facts on connectivity can be found at: <https://www.imf.org/external/pubs/ft/wp/2016/wp1633.pdf>

All three of our airports have been extensively modernized. The Norman Manley International Airport (NMIA), Sangster International Airport and Ian Fleming International Airport serve as the major gateways for passengers moving in and out of the country. Being the primary tourism gateway to the island, the Sangster International Airport (SIA), services more than 40 international airlines in our tourism mecca, Montego Bay. A wide range of hotels and resorts are ideally located minutes away from the airport, with cruise ports in Ocho Rios and Negril within easy driving distance.

Peak arriving and departing capacity is 4,200 passengers per hour. The total international arriving passengers for 2015 was 1,862, 701 while the international departing passengers was 1,877, 327 with total aircraft movement of 41,884.

Located in the first city, the NMIA is a major economic catalyst for the Kingston Metropolitan Area, with economic activity valued at an estimated JA\$15.2 Billion (equivalent to 5.6% of GDP). The airport is currently served by 13 international airlines which include: Air Canada, Rouge, Aerogaviota, American Airlines, British Airways, Caribbean Airlines, Cayman Airways, Copa Airlines, Fly Jamaica, Insel Air, Inter Caribbean Airways, Jet Blue, Spirit Airways, and West Jet.

The Ian Fleming International Airport was opened on January 12, 2011 with the intention of handling arrivals of small international jets, international arrivals and to attract high-end tourists to Jamaica's North Coast, including Ocho Rios, Oracabessa and Port Antonio. Ian Fleming International Airport is located 2 miles from Oracabessa, St. Mary.



# Hospitality Room Supply

**J**amaica has a booming Accommodation sector, with a number of hotels and guest houses of all scales ranging from high end palatial all-inclusive hotels to modern more intimate hotels. As of 2013, Jamaica had 833 resort villas, 443 guest houses, 299 apartments and 177 hotels, making a total of 1,753 accommodation establishments. Since then, there are several developments in the pipeline.

<http://www.statista.com/statistics/375870/number-of-tourist-accommodations-in-jamaica-by-type/>

Currently, Jamaica does not have an official rating system in place. However, there are a range of guest houses, villas, and apartments that offer tourists an opportunity to create their own vacation. Bed and Breakfast accommodation has also gained traction, especially for tourists who prefer to plan and coordinate their activities while on the island.

Some of the biggest international names in the hotel industry are here in Jamaica. Spanish Hotel chains are common on the island; brands like the RIU Hotels and Resorts, Iberostar, Grand Bahia Principe have added their finest luxury to Jamaica's tourism product. Other top brands include Sandals Resorts, which is locally owned, Hyatt Ziva Rose, and Royalton Luxury Resorts.

Hotels for the business/professional clientele are also available to meet the needs of this niche. One international name, the Marriot Courtyard Hotel was recently welcomed in Kingston's corporate triangle. Names like Pegasus and Hilton hotels are also found in Jamaica's first and second capital cities, Kingston and Montego Bay respectively.





# Occupancy

**A**s of 2014, the average capacity for accommodation for tourists in Jamaica was 18,379 rooms and 39,210 beds. With several other hotel developments in the pipeline, the sector should see a significant increase in capacity. The tables below give an overview of the national occupancy over the past 6 years.

Hotel capacity in Jamaica has increased significantly since 2009, with an average of 1,200 rooms added between then and 2012.

Room and bed occupancy has fared better, with steady increase in the number of rooms booked between 2009 and 2014.

Up to 2014, Jamaica had 15,418 all-inclusive rooms and 4,892 non all-inclusive rooms island-wide. No doubt, there is a lot of opportunity for growth. Jamaica's business mogul, Michael Lee Chin, stated in a recent interview with business journalist, Owen James, that "Jamaica is ripe for investment in the Tourism sector, with more than enough capacity for large scale-ups in hotel capacity ..."

**Hotels: Average Capacity Available  
Room/Bed Nights Sold & Percentage Occupancy**

Year	Average Capacity		Nights Sold		Average House Counts	% Occupancy	
	Rooms	Beds	Rooms	Beds		Rooms	Beds
<b>2009</b>	18,388	38,248	3,956,993	8,075,999	22,126.0	59.0	57.8
<b>2010</b>	18,759	39,703	4,145,603	8,481,407	23,236.7	60.5	58.5
<b>2011</b>	19,369	41,437	4,275,303	9,002,098	24,663.3	60.5	59.5
<b>2012</b>	19,506	42,557	4,445,241	9,606,507	26,247.3	62.3	61.7
<b>2013</b>	17,872	38,572	4,431,205	9,300,814	25,481.7	67.9	66.1
<b>2014</b>	18,379	39,210	4,570,686	9,780,308	26,795.4	68.1	68.3
<b>% change 13/14</b>	2.8	1.7	3.1	5.2	5.2	0.3	3.4

NB: Estimates were made for some non-compliant hotels





## Hotel Rooms by Category 2014

All-inclusive and Non All-inclusive

Location	All-inclusive		Non All-inclusive	
	Units	Rooms	Units	Rooms
Montego Bay	23	6,574	20	984
OchoRios	16	4,317	19	706
Negril	24	4,167	34	1,116
Other Areas	1	360	41	2,086
Island	64	15,418	114	4,892

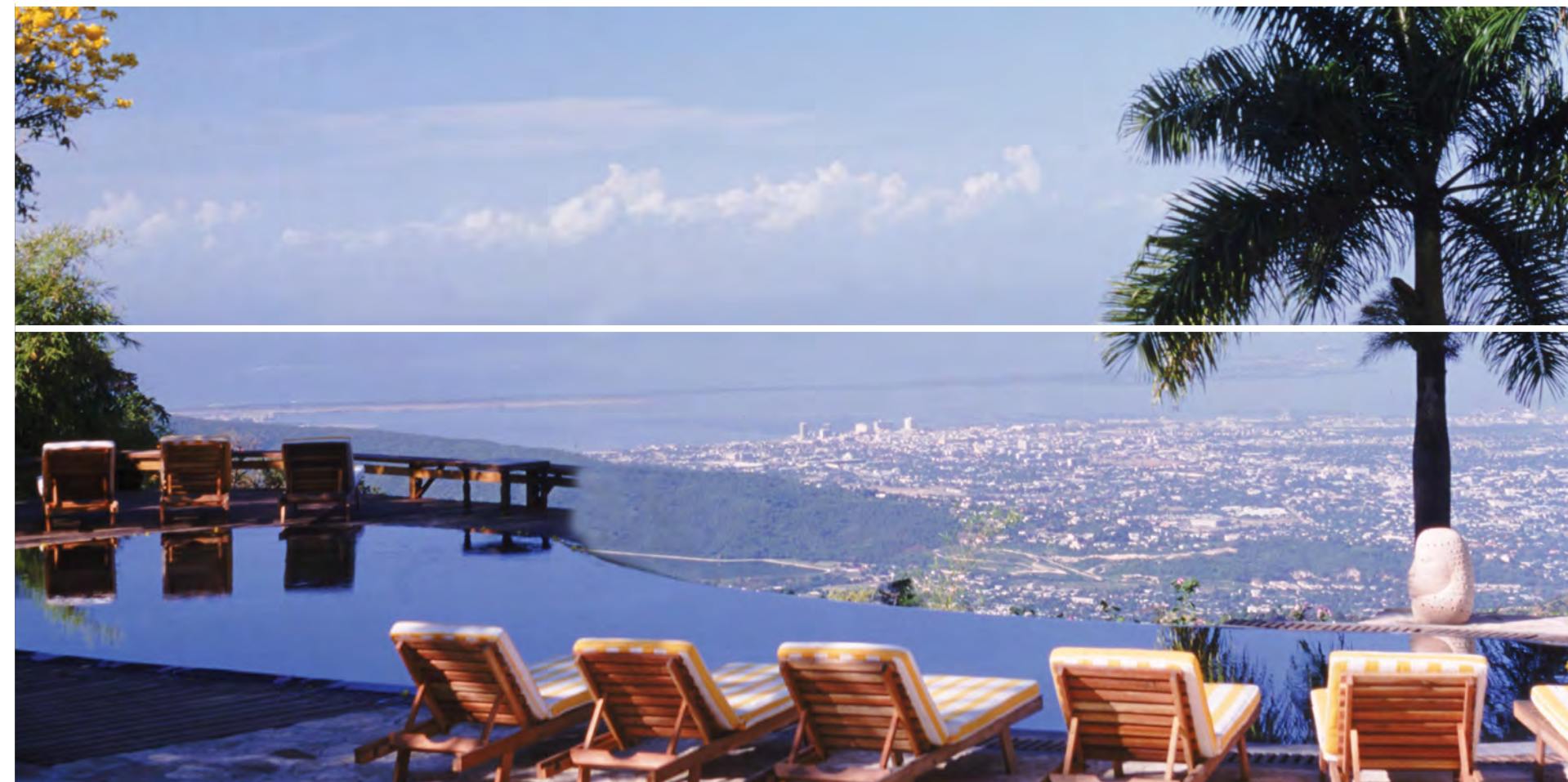
NB: The all-inclusive category include hotels which offer mixed package plans; Data exclude properties that were closed as at December 2013

### Tourist Accommodation Inventory by Category

Category	Units					Rooms				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Hotels	169	174	175	177	178	20,823	20,665	20,974	20,359	20,310
Guest Houses	426	423	424	443	452	3,152	3,042	3,061	3,087	3,162
Resorts Villas	1,144	1,174	1,153	833	840	3,781	3,874	3,801	2,772	2,805
Apartments	289	289	288	299	291	735	723	700	621	611
<b>Total</b>	<b>2,028</b>	<b>2,060</b>	<b>2,040</b>	<b>1,753</b>	<b>1,761</b>	<b>28,491</b>	<b>28,304</b>	<b>28,536</b>	<b>26,839</b>	<b>26,888</b>
Closed Properties	132	150	129	413	438	3,377	3,613	3,587	5,311	5,782
<b>Total Inventory</b>	<b>2,160</b>	<b>2,210</b>	<b>2,169</b>	<b>2,165</b>	<b>2199</b>	<b>31,868</b>	<b>31,917</b>	<b>32,123</b>	<b>32,150</b>	<b>32,670</b>

## Rev Pars & ADR.

**I**n 2015, the revenue per available room in Jamaica was US\$208.27 with an average daily rate of US\$280.11. This year, that value has dropped to US\$192.49 with an average daily rate of US\$286.31.





# Competitive Set & Comparisons

Country	International Tourist Arrivals (In US\$ Thousands)			International Tourism Receipt (US\$ Million)		
	2012	2013	2014	2012	2013	2014
<b>Jamaica</b>	1,986	2,008	2,080	2,046	2,113	2,225
<b>Bahamas</b>	1,422	1,363	1,422	2,311	2,285	2,308
<b>Puerto Rico</b>	3,069	3,200	3,246	3,193	3,334	3,438
<b>Cuba</b>	2,815	2,829	2,970	2,326	2,326	2,344
<b>Mexico</b>	23,403	23,734	29,091	12,739	13,819	16,258
<b>Dom. Republic</b>	4,563	4,690	5,141	4,736	5,118	5,637
<b>Costa Rica</b>	2,343	2,428	2,527	2,299	2,483	2,864
<b>Brazil</b>	5,677	5,677	5,813	6,645	6,711	5,843
<b>Argentina</b>	5,585	5,571	5,935	4,887	4,411	4,627
<b>Peru</b>	2,846	3,164	3,215	2,657	3,009	3,001
<b>Chile</b>	3,554	3,576	3,673	2,150	2,219	2,252
<b>Colombia</b>	2,175	2,288	2,565	2,354	2,491	3,914

# National Hotel Room Development

**I**n 2014, there was a boost in tourism investment with the implementation of new projects across the island. International brands such as the Hyatt (Ziva and Zilara), the Azul Sensatori Hotel and the Royalton completed the construction of hotels that same year.

2015 also saw the launch and completion of several projects. The Moon Palace Resort, formerly the Jamaica Grande, was opened in July 2015 at an investment value of US\$150 million. The Courtyard Marriott was another major hotel development that was completed and opened in November 2015. Other smaller hospitality projects such as Luna Sea and Indigo Bay Resort were also completed during 2015.

And that is just the tip of the iceberg in terms of the number of hotel developments in the pipeline.

A US\$1 billion upgrade of the Braco Village Hotel & Spa was also announced last year by the Spanish luxury chain Melia, and is expected to be completed in the near future.

In addition to its Azul Sensatori resort, Mexican company Karisma, has also announced plans to expand in Jamaica when it launches the Azul Beach in Negril in 2016.

The table below gives a snapshot of some of the hotel room developments since 2014.

**Some Projects in the National Hotel Room Development**

Hotel	Room Count	Value of Investment US\$ Million
<b>Sensatori/Karisma</b>	140	TBD
<b>Hyatt</b>	621	TBD
<b>Marriot</b>	129	22
<b>Royalton</b>	350	50
<b>Moon Palace Resort</b>	730	150
<b>Melia (Braco Village)</b>	TBD	23







# Tax Incentives for Tourism Investment

**T**he Government of Jamaica recently implemented a very comprehensive set of incentives under the Omnibus Incentive Regime which seeks to streamline tax collection and provide incentives for businesses. Under this framework, tourism opportunities are afforded relief through the following:

## The Fiscal Incentives Act, 2013

This is targeted at small and medium size businesses and provides for the reduction of the effective corporate income tax rate by applying:

- An Employment Tax Credit (ETC) at a maximum value of 30%
- A Capital Allowance applicable to a broadened definition of industrial buildings

The Income Tax Relief (Large-Scale Projects and Pioneer Industries) Act

This is targeted at large-scale projects and/or pioneering projects and provides for an improved and more attractive rate for the Employment Tax Credit (ETC). Projects to be designated either as large-scale or pioneer will be based on the decision of Parliament having been informed by an Economic Impact Assessment.

## Revised Customs Tariff, 2013

This is targeted at the productive sectors and provides for the 0% duty on capital equipment and raw material. Persons in Manufacturing, Tourism and Creative industries stand to benefit from duty free importation of industry-related consumer goods.

## INCOME TAX ACT (Junior Stock Exchange)

As of January 1, 2014, companies listed on the junior stock exchange will not be required to pay income tax in the first five (5) years. A company listing after January 1, 2017 will be ineligible for this incentive.

## Productive Inputs Relief (PIR)

The PIR provides for duty free importation of certain hotel industry-related items that would have normally attracted customs duties and the Additional Stamp Duty (ASD) when these are being purchased for productive use.

Also, tourism attraction projects can benefit under the Income Tax Relief (Mega Projects and Pioneer Industries) Act, where they qualify for an attractive rate under the Employment Tax Credit (ETC) system.





# Timeshare Investment Opportunities

## Background

**J**amaica welcomes potential investors to participate in the investment opportunities in the timeshare or vacation ownership market. In answer to the calls of investors who have shown interest in establishing the Timeshare/Vacation Ownership in Jamaica, the Tourism sector is now ready to implement this regulation. With the approval of the Timeshare Vacations Bill in the Jamaican Senate on November 28, 2014, the Jamaican Tourism sector introduced this exciting product in early May 2016. This framework is expected to churn new investments into the sector by welcoming new product offerings that will enable the country to capitalize on the demand of guests to own a second home in Jamaica or the Caribbean.

## What is Timeshare?

Timeshare or vacation ownership is the acquisition of future holidays at today's prices. Timesharing allows multiple individuals the rights to use the property within an allotted timeframe usually fixed to a particular week of each year.

This right being conferred is in consideration of a premium and an obligation to contribute to the maintenance of the property. Timeshare has become popular across the vacation des-

ination segment of the hospitality industry.

There is an ongoing need for improvement in key aspects of the tourism product, including development and diversification, improving standards, upgrading of infrastructure in resort areas and human resource development.

The Jamaican Government is anxious to develop a more sophisticated tourism product that embraces vacationers who are interested in time sharing, also known as Vacation Ownership.

## Investment Opportunities in Jamaica's Timeshare Market

Presently, most of the hotels in Jamaica are located in Negril, Westmoreland, with 64 hotels and 5,364 rooms; followed by Montego Bay, St. James with 51 hotels and 7,918 rooms; and Ocho Rios, St. Ann with 40 hotels and 6,408 rooms.

While Jamaica has been seeing an increased number of visitors, this is being stifled by the lack of rooms to accommodate the growth. Over the last 3 years, new investments in Jamaica's hotel industry have been targeted at the higher end of the market with a focus on the luxury all-inclusive concept.

Now is the best time for investors to come in and develop timeshare accommodations in Jamaica. Currently, Jamaica receives about 10% of the Caribbean tourism market and ranks third among the most popular destinations in the Caribbean. In addition to the island's many beach attractions, Jamaica's other popular attractions include the following:

- **Bob Marley Museum, Kingston**
- **Rose Hall Great House, St. James**
- **Dolphin Cove, St. Ann**
- **YS Falls, St. Elizabeth**
- **Devon House, Kingston**
- **Green Grotto Caves, St. Ann**
- **Dunn's River Falls, St. Ann**

<http://7waterworks.com/tours/rose-hall-great-house/>

## Enabling environment for timeshare industry

The Timeshare Vacations Act will ensure that the prescribed fee to be paid by developers for executing a timeshare plan is US\$2.00 (or the equivalent amount expressed in Jamaican currency) for every 7 days of registration of the timeshare plan.





# Tourism Development

**S**ustainability, Strategic Vision, Growth and Development - these are the four pillars on which the Tourism Master Plan for Jamaica is built. The government is moving forward with this Master Plan which seeks to guide the industry's development over the next decade by creating a strategic vision for its growth and development and establishing an enabling environment to help it realize that vision.

**In summary, the Tourism Master Plan has the following objectives:**

- Growth based on a sustainable market position. The industry needs to return to a path of sustained growth and to do so must develop a sustainable market position. In line with market trends, a sustainable market position must be based on Jamaica's heritage – natural, cultural, historic and built;
- Enhancing the visitor experience. The current rundown resorts must be made more attractive; gaps in the product offer covered through mobilizing investment; and the visitor experience made more rewarding and diverse through increasing the types and quality of attractions. The aim should be to achieve self-sustaining growth based on word of mouth referrals and high repeat visitors;

- Community based development. For sustainable development, local communities must play a major role in defining, developing and managing the tourism experience so that they take ownership of the industry and are committed to providing the visitor experience on which the success of the industry depends. Planning should be bottom-up, not top down;
- An inclusive industry. From its current perception as an exclusive industry that benefits the few, the Jamaican people should come to view the industry as inclusive, benefiting them and the country as a whole. This will call for measures that ensure the benefits of tourism are spread widely and promote gender equality;
- Environmental sustainability. The environment is an integral part of the product. Its continued degradation threatens the future of the industry and the lives of successive generations. The industry must contribute to the preservation of the natural habitat.





## Tourism's Role in the Economy (% of GDP)

**T**ourism has contributed consistently to Jamaica's gross domestic product (GDP) growing at a Compound Annual Growth Rate (CAGR) of 7% between 2010 and 2014. The average share of GDP between 2010 and 2014 is 6.8% recording an above average performance in 2014 of 7.5% of GDP or JA\$115 billion.

The World Travel and Tourism Council identifies the contribution of travel and tourism to the economy directly through commodities and services contributions. Areas in accommodation and transportation, recreational services, attractions etc., provide the reference for calculating the contribution of this sector to the wider economy.



## Labour Availability & Training

**Y**early, thousands of university graduates trained in tourism and hospitality, enter the labour market in Jamaica. With Tourism Hospitality and Management courses being offered at all of the major universities, there is an adequate number of budding tourism hospitality managers and engineers available to flood the tourism labour market.

The two leading tertiary institutions in the island, the University of the West Indies (UWI) and the University of Technology (UTECH), as well as, the Western Hospitality Institute and the Jamaica Hotel & Tourist Association Institute of Management, offer courses geared at filling all levels of employment within the sector. Other institutions providing training in tourism and hospitality are highlighted below.

### HEART Trust/National Training Agency (NTA)

The HEART Trust/NTA is one of the main institutions that supplies workers to the Tourism and Hospitality sector. Under the National Vocational Qualification of Jamaica (NVQJ), twenty four programmes are delivered in this sector, with the largest cohort of graduates emerging from the Commercial Food Preparation and Housekeeping programmes. Since

2010, 10,969 individuals have been certified in housekeeping and 16,678 in commercial food preparation over the same period.

The number of individuals that graduate each year from each programme varies. For the BSc in Tourism and Hospitality Management approximately 20 students average graduate each year. For the MSc in Tourism and Hospitality Management, approximately 7-10 on average graduate each year.

The University also has new plans and programmes that are being developed as it relates to the Tourism and Hospitality sector. Firstly, the university has a harmonization plan which includes the unification of all tourism programmes across all UWI campuses. Secondly, the development of an MSc in services management is in the pipeline.

The Western Hospitality Institute (WHI) offers four courses from which approximately 50-70 students graduate each year. These programmes are offered at the certificate, diploma, associate and bachelor degree levels. At the BSc level, the WHI offers Hospitality Management and approximately 30-35 students graduate each year.

They also offer Food and Beverage Service and Commissary Chef Programmes under

CAP, which produces approximately 150 graduates each year.

In an effort to assist the development of senior management in Jamaica's hospitality and tourism industry, the Jamaica Hotel & Tourist Association (JHTA) launched the JHTA Master of Science (MSc) in Hospitality and Tourism Management in April 2003.\* This degree is awarded by Reevans University, with the support of IMCA Socrates and the Canadian School of Management. Individuals who have a first degree and have gained relevant work experience in the Hospitality and Tourism industry are qualified to apply to join this programme. To date, the institute has graduated over 100 students, averaging approximately 8 graduates each year.

The tables below give a snap shot of the overall labour force availability, as well as the tertiary institutions that offer Tourism courses.\* See more at:

<http://www.jhta.org/index.php/events/jhta-institute-of-management>





Number of Graduates from Secondary Institutions and Above

	University Graduates	Other Tertiary Graduates	Secondary Graduates
<b>Female</b>	77,097	89,430	590,643
<b>Male</b>	44,792	43,439	579,853
<b>Total</b>	121,889	132,869	1,170,496

Source: Population Census (STATIN). Last updated May 30, 2013



## Conservation of Natural Resources

**K**ey to Jamaica's tourism product is its integration with the natural environment, ensuring longevity of the sector and the Jamaican landscape. Industry activities are designed to promote biodiversity and promote local sustainable development planning in resort areas. These initiatives are, in part, managed by the National Environment and Planning Agency (NEPA). The agency operates under numerous acts related to the natural environment inclusive of:

1. The Natural Resources Conservation Authority Act (1991)
2. The Beach Control Act (1956)
3. The Watersheds Protection Act (1963) More acts can be found at: [http://www.nepa.gov.jm/new/legal\\_matters/laws/index.php](http://www.nepa.gov.jm/new/legal_matters/laws/index.php)





# SHOVEL READY PROJECTS

## Rose Hall Estates

*Rose Hall Estates, Luxury at its Finest...*

**R**ose Hall community of resorts is a master plan development and sets a standard in the Caribbean Resort market.

The property features gorgeous stretches of white sandy beaches with clear waters of all hues of blue one can imagine, flanked by scenic communities.

Located on the north coast of Jamaica in the parish of St. James, east of the Donald Sangster International Airport and the Montego Bay Cruise Ship Pier, and west of the Falmouth Cruise Ship Pier, the four properties in the Rose Hall Development offer opportunities to investors interested in acquiring and developing luxury resorts along the Caribbean Sea. Within close proximity of each other, the four locations are accessed from the North Coast Highway with sizes ranging from 9 to 81 acres. Infrastructure such as sewage disposal, potable and non-potable water, telecommunication and electrical services are readily available with connections off the North Coast highway.

**LOCATION:** Rose Hall, St. James

### DESCRIPTION

Rose Hall is a luxury resort community situated east of Montego Bay on the north coast of Jamaica. This tourism "hip strip" is also the home of the Sangster International Airport, the island's leading gateway boasting yearly arrivals of over 3.8 million (2 million being international visitors) recorded in 2015.

The development offers prime real estate that boasts pristine beachfront that stretches for miles, (between 840 feet to 3,900 feet to be exact) and is protected by a thriving eco-system of coral reef. St. James has as many as 2,500 rooms dispersed among a string of premier hotels and resorts along the coast, namely RIU Montego Bay, Sandals, Coyaba, Holiday Inn, Half Moon, Hyatt Ziva & Zilara, Hilton, Iberostar and the soon to be constructed Resort & Casino.

The strip is vibrant with several leisure activities taking place all within a 30 minutes travel radius. For example, three world class golf courses located at the White Witch, Cinnamon Hill and Half Moon properties are only five minutes away. Jimmy Buffett's Margaritaville is only 20 minutes away and so is the popular jerk joint, Scotchies. Other popular attractions and business centres include the Rose Hall Great House, legendary home of Annie Palmer, the Montego Bay Convention

Centre, a shopping centre and the Craft Market. The Montego Cruise Pier is also a mere 25 minutes away.

All major infrastructure are accessible at the southern lot line; National Water Commission and Rose Hall (Developments) Limited for potable water, Rose Hall (Developments) Limited for non-potable water, sewage disposal & treatment, Jamaica Public Service Co. Ltd. for electricity.





## COMPETITIVE ADVANTAGES

Jamaica being the foremost English-speaking and the third overall most popular island paradise destinations in the Caribbean, and the Government's announcement to ramp up tourism investments by creating incentives for investors, Jamaica is set for a tourism boom in the next 5-10 years.

The Rose Hall resort community is perhaps one of the most suitable locations to accommodate a variety of events and activities. A mere five minutes away there is a world-class Convention Centre that has been declared by the World Travel Awards as the 'Caribbean's Number One Meeting and Conference Centre.' The facility boasts 127,000 square feet of meeting space with areas for exhibition suitable for trade shows and ballroom spaces.

Rose Hall is an ideal location for investment opportunities in today's economic climate. In addition to Hilton and RIU hotels that are expanding, at least two new resorts should be breaking ground later this year.

## TYPE OF INVESTMENT REQUIRED:

These properties are being sold within the price range of US\$750,000 – US\$1.2 million per acre.





# Caribbean Cove, Rose Hall

Caribbean Cove boasts 81.3 acres of pristine land, with an ocean frontage of 3,900 ft. Natural beach enclaves and protective coral reefs make for a great day at the beach. The property also has a 54-holes premier golf course.



# Aqueduct, Rose Hall

The second largest of the four properties, Aqueduct boasts 27.6 acres of land flanked by 840 ft of pristine beachfront. Adjacent to a 54-holes golf course, and a sprawling shopping centre, The Aqueduct offers activities for the entire family, young and old alike.





# The Palms, Rose Hall

The smallest of the properties, The Palms is 9 acres of magnificent greenery with 1,300 ft of unspoilt beachfront and coral reef.



# Seaside At Rose Hall

Seaside at Rose Hall boasts 26.8 acres of land, with 2,870 ft of unspoilt beachfront. This breathtaking property is also conveniently close to a premium shopping centre and world-class golf course.





# Ciboney Culloden

*Where Your Luxury Dream Villa Awaits You*

## OVERVIEW

The Ciboney Culloden property is 17.06 acres of the perfect private getaway, tucked away in the rich vegetation along Jamaica's south coast.

The property forms part of a recently established subdivision and is located in an area which has been developing steadily over the past 5 to 7 years with a number of private dwelling houses and most recently, the development of the Sandals Whitehouse to the west.

## LOCATION

The property is located on the southern side of the main road leading from Whitehouse to Belmont in the parish of Westmoreland, about one kilometer west of Whitehouse and two kilometers east of the Sandals Whitehouse property, not too far from the capital city of Savannah-la-Mar.

## DESCRIPTION

The property has an extensive main road stretching 1,036 ft and 731 ft of breezy seaside. The land slopes gently down from the roadway towards the sea, which mainly consists of a white sand beach. The property also boasts a commanding view of the surrounding harbour.



## COMPETITIVE ADVANTAGE

The property is ideal for high density resort/residential development or subdivision for individual residences. Ciboney Culloden will also be an ideal venture for Timeshare investments.

Public electricity supply is readily available in the area. Banking, shopping and other domestic requirements are located in both Black River about 10 miles to the east, or Savannah La Mar about 12 miles to the west and also in Whitehouse.

## TYPE OF INVESTMENT REQUIRED

The holders are seeking an outright sale of this property at US\$2 million, negotiable.







# Cotton Tree Bay

*Enjoy the Best of Jamaica's West End*

## OVERVIEW

Cotton Tree Bay is located in Green Island, Hanover in close proximity to Montego Bay and Negril. The 200 acre property boasts 2 miles of waterfront with some white sand beach. The property can be accessed via the super highway connecting Montego Bay and Negril.

**LOCATION: Green Island, Hanover**

## DESCRIPTION

The offered property starts at the eastern point of Green Island Bay and continues for 2 miles east along the northern coastline. Some grooming and development of these beaches may be necessary to bring out its optimum pristine beauty. Water and roads are present on this property.

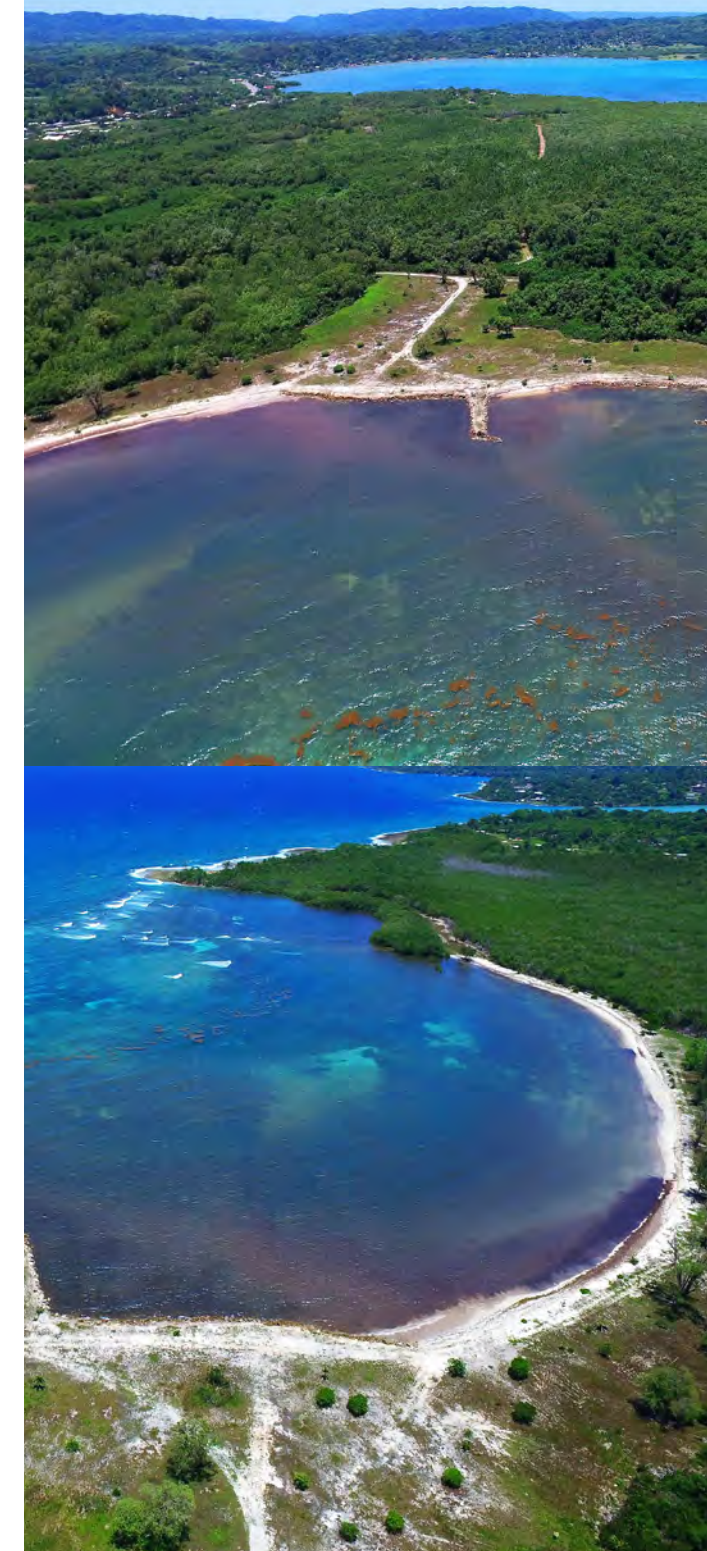
## COMPETITIVE ADVANTAGES

This desirable location has many possibilities: villas, hotels, nudist colony, spa facilities, fitness, tennis, nature trails, exclusive residential homes, golf course and riding stables. Its extensive coastline could offer various water sports from sailing, snorkeling and scuba diving to spearfishing. The turquoise water offers local natural flora, fauna

and marine life. Enjoy the beautiful sunsets from this western waterfront. Cotton Tree Bay is the ultimate in seclusion, peace and quiet.

## TYPE OF INVESTMENT REQUIRED

The property is for sale.







# East End Jamaica

*Where Rich History and Natural Beauty Merge Against a Backdrop of the Rising Sun*

## OVERVIEW

One of the last large tracks of white sand seashore in Jamaica, East End's natural and unspoilt characteristics suggest great potential for the development of a single, multi-faceted and unique resort. This potential, coupled with worldwide growth of tourism and identification of eco-tourism as high growth market segment, points naturally to specific development themes for the property.

## LOCATION: EAST END, ST. THOMAS

## DESCRIPTION

Fronted by white sands and a reef-protected bay, East End is an isolated and untouched property of 1,044 acres. East End, with the exception of a small area on which the lighthouse stands, comprises all of the land to the east of a line running north east to east from Quaco Point to approximately 2/3 of a mile west of South East Point.

## COMPETITIVE ADVANTAGES

The Morant Point Lighthouse, East End, built in 1841 is the oldest lighthouse in the island.

The site is a Jamaica National Heritage Trust listed National Monument and it is owned and operated by Port Authority of Jamaica.

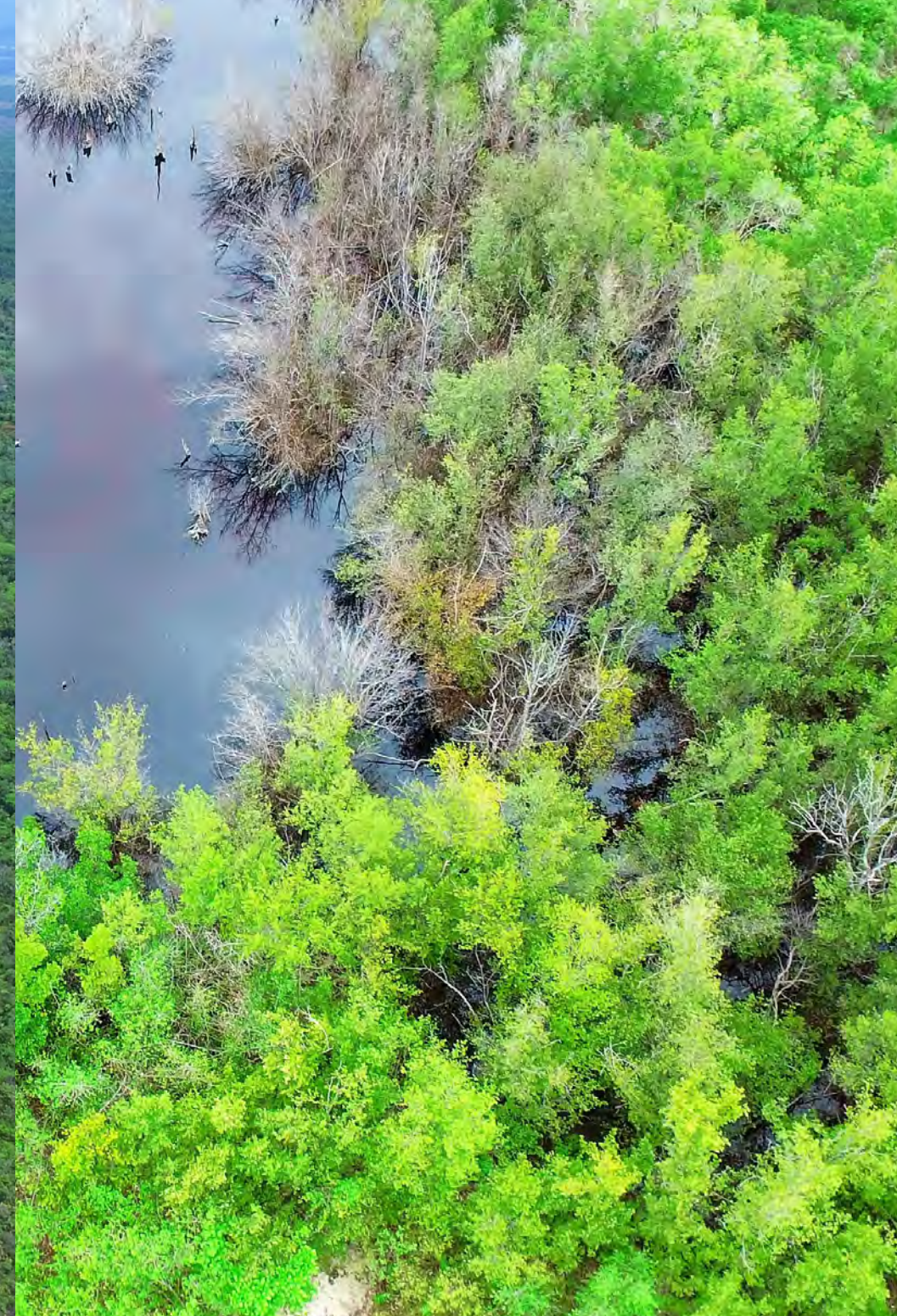
This historic lighthouse adds a romantic touch to the site, offering spectacular views of East End, the agricultural plains and the John Crow Mountains.

## TYPE OF INVESTMENT REQUIRED:

The property is for sale at a price of US\$25 million.









# Paradise Park Estate

*Bask in Utmost Pleasure at Paradise Park Estate!*

## OVERVIEW

Paradise Park Estate is a just under 1,900 acres of rolling pastures on relatively flat land on Jamaica's southern coast. The eco park has stretches of unspoilt palm tree forests and wetlands framed by the blue horizon of the Caribbean Sea. The property also has approximately 2,230 feet of white sandy beach on the western side of world famous Bluefields Bay in the parish of Westmoreland.

**LOCATION: BLUEFIELDS BAY,  
WESTMORELAND**

## DESCRIPTION

The sprawling 18<sup>th</sup> Century estate is located on a tropical savanna with lush, grassy pastures and brilliantly colored flowering trees and shrubs. Close by the sea are tangled scrublands, a natural palm jungle and mangroves where the Sweet River empties into the bay. It is best viewed at a sedate pace on horseback. No galloping is allowed and a tour of the property takes about 1 ½ hours.

With a reserve of birdlife and towering trees of all kinds, the Park is perfect for picnics and nature trails. The property also has one of the best and longest white sandy beaches in Jamaica, and is ideally suited for hotel and residential development, as well as a small harbor to accommodate pleasure yachts and small boats. The property can also accommodate

two 18-hole golf courses. Development of Paradise Park as a tourism resort would fall within the Government of Jamaica's development and land use policies.

## COMPETITIVE ADVANTAGES

The Paradise Estate has a river that runs from the north side of the property into the Caribbean Sea.

Pristine coral reefs lie offshore to the east and west of the opening to Bluefields Bay. A shipwreck lies near the reef to the west of Paradise. The area is ideal for snorkeling and diving.

Paradise Park is located 5 miles east of the town of Savanna-la-Mar, and 25 miles south of Montego Bay. Paradise is approximately a 1 hour drive from the Sangster International Airport in Montego Bay, and ½ hour drive from the resort town of Negril.

Accessibility comes with ease with a highway that runs along the coast. Utility, water and sewage infrastructure and facilities are also in place.

## TYPE OF INVESTMENT REQUIRED:

This property is for sale at US\$70 million and is negotiable.





# Cardiff Hall Properties

## Cardiff Hall (I)

*Guaranteed to Revitalize Body and Spirit*

### OVERVIEW

Nestled in the hills of Cardiff Hall, Runaway Bay, St Ann, this property is a well-guarded secret paradise. The property is perfect for a secluded hideaway vacation, with an intimate setting for your special event or a professional atmosphere for your corporate engagement. It is also suitable for a destination spa.

### LOCATION: RUNAWAY BAY, ST. ANN

### DESCRIPTION

The vision is to have this area developed to accommodate high end resort villas, townhouses & apartments with common areas including a jogging trail and club house with a pool. Conceptual plans have been developed. Request for Proposals are currently being done to invite interested parties for the acquisition and development (in line with the local planning authority's regulations) to facilitate a resort and/or residential development.

The property is located between the main road and the sea. It extends north towards the Caribbean Sea and next to the Cardiff Hall public bathing beach, in the town of Runaway Bay.

The property is vacant and unimproved and can be accessed just west of the stop light intersection with Ricketts Drive. Registered by survey as land part of Cardiff Hall Plantation and Unity Pen in the parish of St. Ann, the property has an area of 4.57 hectares (11.28 acres).

The property is in an area that is zoned for resort/residential purposes under the provisions of the Town and Country Planning (St. Ann Parish) Confirmed Development Order, 1999.

It enjoys the amenity of a private beach in addition to its locational advantage of being along a main arterial road, in close proximity to several major resort facilities and access to readily available transportation links to other north coast areas. It has excellent attributes and is easily developable given its amenable topography and surrounding support services.

The location has good road transportation links with other north coast centres along the A1 route, which links the entire north coast resort strip from Montego Bay in the west to Ocho Rios in the east. It is within close proximity to shipping/port facilities and airstrips at Discovery Bay (Puerto Seco) and at Ian Fleming International Airport (Boscobel).



The area is also within reasonable commuter distance of the Sangster International Airport in Montego Bay that is approximately 74.00 kilometers (46.00 miles) west of Runaway Bay.

### COMPETITIVE ADVANTAGES

There is usually strong demand for properties situated close to this resort centre because the area readily serves locals and tourists alike. Cardiff Hall/Runaway Bay is no exception, but while the property prices in that area are good they tend to be lower than prices in Ocho Rios, which is among the most developed resort centres on the north coast.

### TYPE OF INVESTMENT REQUIRED

Proposals are invited from interested parties for the acquisition and development of Cardiff Hall to facilitate a resort and/or residential development. Proposals must be in line with the local planning authority's regulations.

The external valuations were commissioned. The recommended price is US\$2.4 million.





# Cardiff Hall Properties

## Cardiff Hall (II)

### Stately Comfort and Relaxed Recreation

#### OVERVIEW

Cardiff Hall is a 21 acre property located on the southern side of the Ocho Rios to Montego Bay main road wrapping around the championship golf course in Runaway Bay. It is best accessed from the North Coast highway onto the western end of Ricketts Drive then continuing southerly to Guava Way. The property is bounded as follows:

- North - by Guava Way - access road;
- South - by Lots 512 to 517 Cardiff Hall - residential;
- East - by Lots 502 to 511A Cardiff Hall - residential;
- West - by Lots 519 to 528 Cardiff Hall - residential.

#### LOCATION: RUNAWAY BAY, ST. ANN

#### DESCRIPTION

This is a fairly regular shaped parcel of land that narrows and bends toward a south-western corner tip. It is widest along the northern boundary having good road frontage that extends about 270 meters.

The site topography is generally level and of good even grade maintaining a slight pitch from the frontage up to the rear (southern)

boundary. Drainage appears to be unimpeded at surface and there is no apparent risk of flooding or erosion. The site is vacant and unimproved with enclosed fencing.

#### COMPETITIVE ADVANTAGES

The property is conveniently situated on a strip rife with tourist activities. Beaches, hotels and an 18-hole championship golf course with club facilities flank this property. The site has excellent attributes that are suitable for hotel and resort development.

Services immediately available to this location include paved roadways, piped water supply; electricity, telephones, cable television, high speed internet, postal services, police protection, supermarket shopping, and garbage collection. For the wider range of urban goods and services, this area relies on St. Ann's Bay and Ocho Rios which are approximately 20 and 30 minutes commuting distance by car, respectively.

The property falls within the Runaway Bay local planning area and is zoned for low density residential development. It is expected that proposals for development would be within the existing tone of this residential neighborhood which is distinctly low density with main-

ly architect designed single and two storey residences on generous curtilages pervading an atmosphere of affluence and privacy.

#### TYPE OF INVESTMENT

Proposals are invited from interested parties for the acquisition and development of Cardiff Hall to facilitate a resort and/or residential development. Proposals must be in line with the local planning authority's regulations.

Based on valuations the recommended price for this property is US\$1.4 million.









# Jobson Peninsula

*A Breathtakingly Beautiful and Serene Hideaway*

## OVERVIEW

Jobson Peninsula is a private peninsula with more than 15 km of pristine white sandy beaches located in the Parish of Trelawny immediately next to the town of Falmouth and 1.5 miles from the Port in the northern end of Jamaica. The property is suitable for Eco Resorts, Hotels, Timeshare, and as a Private Marina and related activities.

**LOCATION: HALF MOON BAY, FALMOUTH, TRELAWNY**

## DESCRIPTION

Framed by the Caribbean Sea, the property has an air reminiscent of early years of Negril's famed and unspoilt beaches. The Peninsula is within walking distance from the historic, romantic town of Falmouth as well as the Port of Falmouth used by the world's largest cruise lines.

The property boasts a world-class sunset on the western side where lagoon meets the Caribbean Sea, as well as a picturesque diving site and fish sanctuary along the reef. Scenes from the movie in the James Bond series "Dr. No" were filmed on the lagoon side of the property in 1962. The lush lagoon on the southwest of the property is a sanctuary of unique marine life.

## COMPETITIVE ADVANTAGES

Jobson Peninsula is within minutes of the Port of Falmouth which welcomes the world's largest cruise ships with a projection of ~1.8 million tourists per year. It is minutes from Martha Brea Rafting, Glistening Waters and next door to Swamp Safari. It lies only 28 km or just 17 minutes from the Sangster International Airport and the city of Montego Bay.

Jobson Peninsula is an extensive 380-acre (~1,547,358 m. sq.) with easy access to the North Coast Highway from Montego Bay to Ocho Rios. The property is four miles from the North Coast Highway and 17 miles from Sangster International Airport.

## TYPE OF INVESTMENT REQUIRED

Proposals for joint venture partnership, partial divestment or full sale of the property or other feasible investment modality are welcomed.





# Amaterra Resort Township & Golf Course

## *A Sparkling Jewel of Jamaica*

### OVERVIEW

Along the sapphire seas of the north coast, between the island's two largest tourist centres Montego Bay and Ocho Rios, the Amaterra Resort development spans over 1,030 acres of prime land with an assortment of resorts, residential and commercial properties blended into the scenic topography of Duncans Trelawny. Within 10 minutes of the historic Falmouth Pier, Amaterra bares several features; expanse sandy beaches, accentuated by majestic limestone cliffs towering above the Caribbean Sea with direct exposure to the north-east trade winds.

### LOCATION: DUNCANS, TRELAWNY

### DESCRIPTION

Near the access point of the North Coast Highway, approximately 115 acres of the Amaterra development is reserved for a commercial village ideal for retail with residential accommodation above, plus dining and entertainment facilities. Professional offices, service and warehouse spaces, a university, a state of the art health & wellness facility, research laboratory and IT/BPO park are also planned.

Amaterra Jamaica Limited offers a world-class experience with its combination of resorts, residential and luxury amenities including attractions on the finest remaining pristine oceanfront properties in the entire Caribbean.

With an estimated construction cost of approximately US\$1.7 billion, the Amaterra Resort development is the biggest and most exciting tourism/investment opportunity on Trelawny's north coast, a sterling tourism destination for Jamaica.

### COMPETITIVE ADVANTAGES

Apart from the geographic location which adds to the project's appeal, Amaterra has no external debt and all required development approvals are in hand. These are:

1. Subdivision of lands
2. Beach Development
3. Golf Course
4. Environmental Permits
5. Sewerage Permits (currently being renewed due to recent changes in requirement standards)

The Amaterra Resort development is already in full shovel-ready/groundbreaking stage and comprises of over 40 approved parcels of land which can be further subdivided into residential lots and five parcels for five (5) five-star hotels, providing over 2,300 rooms, all overlooking the Caribbean Sea.





### Amaterra Resort Development - Approved Land Usage

Description	Size (Density)
<b>Approved Hotel Sites:</b>	
o H-1:	20 acres (800 rooms)
o H-2:	5.7 acres (24 rooms, 30 cottages)
o H-3:	21 acres (250 rooms, 50 cottages)
o H-4:	24 acres (500 rooms)
o H-5:	27 acres (600 rooms)
<b>Conference Center/Casino A-6:</b>	6.5 acres
<b>Residential (Manors, Estates, Villas, Luxury Condominiums):</b>	177.7 acres
<b>Golf course:</b>	223.9 acres
<b>Other amenities:</b>	22.5 acres
<b>Township/Commercial Village:</b>	98.8 acres

Among Amaterra's planned luxury amenities and attractions are an 18-hole championship golf course and clubhouse, covering over 7,500 yards in length from the championship tee with the clubhouse which will offer guests and diners a panoramic view of the Caribbean Sea.

A water park, two homeowners' beach clubs and a conference centre with outdoor amphitheater and an equestrian park are also planned features of Amaterra's offerings, ideal for the 'residence club' concept.

Residences of Amaterra will comprise of over 2,000 mixed residential lots suitable for manors, garden villas, ocean front villas, mid-rise apartments, condominiums, and townhomes spanning over 177 acres, which excludes golf course residences.

#### TYPE OF INVESTMENT REQUIRED

Amaterra Jamaica Limited is seeking investors, developers and operators interested in purchasing, leasing or doing joint ventures for each of the 43 parcels of land as per the approved subdivision plan. The total cost for this integrated development is projected at US\$1.7 billion.





# Mammee Bay Resort

*Offering an Exquisite Blend of Traditional and Modern Tourism*

## OVERVIEW

The Mammee Bay Resort property is 29.25 acres of undeveloped beachfront, ideally situated on Jamaica's north coast in the parish of St. Ann, approximately sixty miles from Montego Bay and sandwiched by major tourist hubs, Ocho Rios and the Trelawny Cruise Ship Pier.

## LOCATION

Located in the parish of St. Ann, Jamaica, Mammee Bay Beach Resort can be accessed via the Ocho Rios main road with the new major Kingston to Ocho Rios highway allowing for an easy thirty-minute drive time from Kingston to the property.

## DESCRIPTION

This property is one of the largest stretches of unspoilt beachfront, bounded to the north by exotic lush vegetation, a typical feature of St. Ann that meets a seemingly unending stretch of pristine white sandy beach that measures above 500 meters/1,650 feet. This gently sloping vista is a breathtaking combination of nature's best elements and one of the most beautiful places to enjoy a warm Jamaican sunset.

The general vicinity of Mammee Bay is well-placed in the centre of Jamaica's foremost

tourist belt; with high end resorts such as the Jewel Beach Resort & Spa Hotel and the Club Hotel Riu Ocho Rios located close by. The property itself is literally five minutes outside of the Ocho Rios town square and shopping hub, and within walking distance from the renowned Dunn's River Falls.

Taking all its facets into account, the property could easily be considered an architect's dream, providing the ideal location to create a major resort development that would capitalize on the many historical features of Ocho Rios and its environs. The slope of the land is well suited for a drainage system. The site has the potential for development of up to one thousand (1,000) habitable rooms.

The property represents an excellent project area for any major 4/5 star hotel, or any up-scale resort development. Its overall favorable strategic position, midway between Kingston and Montego Bay, allows for convenient access to both the Sangster International Airport in Montego Bay and the Norman Manley International Airport in Kingston - the hub for international business travel to the island. The newly opened Ian Fleming International Airport which caters mainly to luxury private jets arriving in Jamaica is situated about fifteen (15) minutes from Ocho Rios, further contributing to Mamee Bay Resort's ideal location.



## DESCRIPTION OF PROJECT

The property is part of the government's "Shovel-Ready" Investment Programme for immediate development.

The Environmental Impact Study of the property has already been approved. Approval for water supply and electricity has also been obtained. A comprehensive feasibility study was done for the beach front property and the development plan for a 354 room hotel has been approved. However, the plan can be easily amended to facilitate up to 1,000 rooms in keeping with approved density projections.

## COMPETITIVE ADVANTAGES

One key advantage of developing a hotel in Jamaica's garden parish-St. Ann- is that it is home to several popular attractions in and around its tourist capital, Ocho Rios. These attractions include Dunn's River Falls, Dolphin Cove, Mystic Mountain and Green Grotto Caves.

Access via the North Coast Highway from the capital city, Kingston, will also be a major advantage for tourists who enter the island from the Norman Manley Airport with maximum travel time now at 60 minutes to Ocho Rios.

The site's close proximity to the main cruise ship pier is also a significant factor in considering the property for a major hotel development.

## TYPE OF INVESTMENT REQUIRED

An outright sale of the property based on a valuation of US\$30 million. Negotiations are welcomed.









# Haughton Hall

*Explore Nature's Gifts and Indulge the Senses*

## OVERVIEW

Haughton Hall is 500 acres of lush coastline that is a mere 15 minutes east of the popular resort town of Negril.

## LOCATION

The property is located in the quaint town of Green Island in Hanover.

## DESCRIPTION

This property has a main road running through it, separating the beachfront from the rest of the property which could allow for development on two separate sites:

- The 174 acres long beachfront offers a mile long beach which curves into an intimate cove, providing exclusive access to the Caribbean Sea. On this side of the property, there is viable potential for the development of high end condominiums and hotels.
- On the opposite side of the road, 350 acres are available for housing and commercial development.

These two parcels of land offer developers the opportunity to develop a town/community, with an integrated ecosystem, adding value to the tourism product. Current utilities

include water and electricity.

## COMPETITIVE ADVANTAGES

Haughton Hall offers potential developers the opportunity for subdivision. The property's location to the North West of the island reduces the possibility of beach erosion as wind direction and wave action blow eastwardly.

## TYPE OF INVESTMENT REQUIRED

The property is being sold based on a valuation price of US\$15 million.









## Appendix 1

### Visitation in Last 10 Years

Year	Stopovers	Cruise Passengers	Armed forces	Total Cruise Passengers
2005	1,478,663	1,135,843	1,407	1,137,250
2006	1,678,905	1,336,994	999	1,337,993
2007	1,700,785	1,179,504	1,229	1,180,733
2008	1,767,271	1,092,263	1,010	1,093,273
2009	1,831,097	922,349	885	923,234
2010	1,921,678	909,619	280	909,899
2011	1,951,752	1,125,481	1,165	1,126,646
2012	1,986,085	1,320,083	464	1,320,547
2013	2,008,409	1,265,268	425	1,265,693
2014	2,080,181	1,423,797	Unavailable	1,423,797
2015	2,123,042	1,586,702	Unavailable	1,586,702

\*Source: Jamaica Tourist Board. Annual Travel Statistics

## Appendix 2

### Share (%) of Stopover Arrivals by Source Market

	2010	2011	2012	2013	2014	2015
United States	64.7	62.8	63.3	63.3	62.3	61.3
Canada	16.9	19.4	20.3	19.9	20.2	20.0
Europe:	14.1	13.0	11.2	11.7	12.6	14
United Kingdom	9.6	8.9	7.3	7.5	8.5	9.4
Germany	1.0	1.0	1.0	1.0	1.0	1.0
Spain	0.5	0.4	0.2	0.1	0.1	0.1
Italy	0.7	0.6	0.5	0.4	0.4	0.4
Other	2.3	2.1	2.2	2.7	4.0	2.2
Caribbean	3.0	3.4	3.3	2.9	2.8	3.0
Latin America	0.7	0.8	1.3	1.5	1.4	1.4
Asia	0.3	0.3	0.4	0.4	0.4	0.4
Other	0.2	0.2	0.3	0.3	0.3	1.7

Source Economic & Social Survey Jamaica 2015





### Appendix 3

#### Expenditure in the Last 10 Years

Year	Expenditure **US\$,000
2005	1,545,055
2006	1,870,560
2007	1,910,105
2008	1,975,519
2009	1,925,423
2010	2,001,244
2011	2,008,343
2012	2,069,568
2013	2,112,767
2014	2,247,834
2015	2,380,800

\*Source Jamaica Tourist Board. Annual Travel Statistics

### Appendix 4

#### Distribution of Expenditure of Stopover Visitors in Percentage

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
<b>Accommodation (Including Food &amp; Beverage)</b>	57.3	57.5	55.7	60.0	57.3	54.9	54.9	50.3	48.7	42.5	49.7
<b>Food &amp; Beverage</b>	6.2	5.6	7.4	6.5	7.2	7.0	6.1	6.7	7.2	7.3	6.0
<b>Entertainment</b>	10.6	10.6	10.2	9.8	10.4	11.3	11.7	13.7	12.0	14.9	12.8
<b>Transportation</b>	5.6	5.4	6.2	6.0	5.8	5.4	5.8	6.0	6.6	7.9	6.1
<b>Shopping</b>	10.3	11.2	11.3	8.9	9.8	11.2	10.5	11.8	10.1	11.2	8.4
<b>Miscellaneous</b>	10.0	9.7	9.2	8.8	9.5	10.2	11.2	11.6	15.4	16.2	17.1
<b>Average Expenditure Per Person Per Night (US\$)</b>	101.78	103.51	110.64	114.54	119.47	113.98	115.72	115.74	117.23	120.27	122.19

\*Does not include expenditure of Non-Residential Jamaicans





## Appendix 5

### Distribution of Expenditure of Cruise Passengers in Percentage

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
<b>Food &amp; Beverage (Off Ship)</b>	3.2	5.7	3.7	4.6	3.9	4.2	4.6	5.1	4.8	4.3	3.9
<b>Attractions</b>	11.4	7.6	13.3	22.2	22.6	26.2	20.5	20.4	25.3	28.0	35.0
<b>Transportation</b>	3.0	2.9	2.9	1.9	2.1	2.0	3.1	2.8	5.8	4.8	4.8
<b>Shopping</b>	65	71.6	66.6	58.7	58.3	52.6	55.8	54.0	48.5	47.6	20.1
<b>Tips</b>	0.5	0.2	0.6	0.8	0.8	0.6	0.9	1.1	0.9	1.0	1.2
<b>Miscellaneous (Including Tax)</b>	16.9	12.0	13.0	11.9	12.2	1.6	15.0	16.7	14.7	14.3	14.1
<b>Average Expenditure Per Person (US\$)</b>	84.33	85.21	88.92	97.24	94.19	83.36	87.35	71.27	75.67	79.33	82.3

\*Does not include expenditure of Non-Residential Jamaicans









## Division of Ocean and Marine Resources (Department of Environmental Protection)

### Public Notice

Division of Ocean and Marine Resources  
Department of Environmental Protection  
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or

### PROJECT OF

- **Atlantic City**
- **Atlantic City**
- **Atlantic City**
- **Atlantic City**
- **Atlantic City**
- **Atlantic City**

