

JAMAICA TOURIST BOARD

IN APRIL 2004.....

- Stopover arrivals were up by 17%
- US Market increased by 22%
- Canada increased by 21%
- Europe increased by 1%
- Cruise Passenger arrivals up by 2%.

TOURIST (Stopovers)

Stopover arrivals in April 2004 were **131,101**, an increase of **17%** over the **111,974** recorded for April 2003. For the January to April period arrivals increased by approximately **10%** with **497,186** compared to **454,223** in 2003.

United States

Stopover arrivals from the United States market increased by **22%** in April with a total of **97,366** visitors compared to the **80,106** visitors who came in April 2003. All of the US Market regions recorded double digit increases. The Northeast was up **27%**, the Midwest up **18%**, the South up **14%** and the West up **21%**.

For the January to April period the US market increased by **9%**. Total visitors was **353,221** compared to **323,884** for the corresponding period in 2003. The Northeast increased by **13%**, the Midwest by **8%**, the South by **3%** and the West increased by **10%**.

Canada

In April, the Canadian market increased by **21%** with a total of **9,619** stopovers compared to **7,937** in April 2003. The leading province, Ontario increased by **11%**, and the second most important visitor-producing province, Quebec increased by **21%**. For the other leading provinces, Alberta increased by **123%**, British Columbia by **12%**, and Nova Scotia by **19%**. The provinces of Saskatchewan and Manitoba recorded good growth though from relatively small bases.

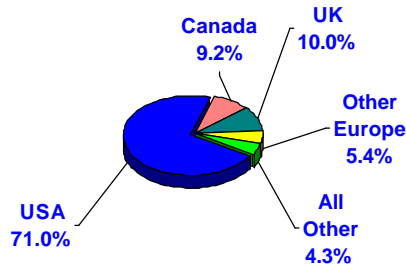
Cumulatively, the Canadian market increased by **9%** in the January to April period, with a total of **45,723** stopovers compared to **41,811** in 2003. The main provinces Ontario and Quebec recorded increases of **5%** and **13%** respectively. The other notable increases were Alberta **79%**, British Columbia and Nova Scotia both with increases of **25%** and New Brunswick with **18%**.

Europe

The European market barely increased by **1%** in April 2004. The market provided a total of **17,658** stopover visitors compared to the **17,523** recorded in April 2003. The United Kingdom and Germany increased by **6%** and **32%** respectively. The other countries which showed notable increases were: Austria (**44%**), and Switzerland (**85%**).

Cumulatively, for the January to April period, the European market increased by **13%**. Total stopovers for the period was **76,634** compared to **67,709** in 2003. The United Kingdom with a total of **49,742** stopovers increased by **16%** and Germany with a total of **7,612** increased by **27%**.

STOPOVER ARRIVALS BY MARKET SHARE
January - April 2004



Latin America

The Latin American market declined by **26%** in April with a total of **773** stopovers compared to **1,041** in April 2003. The main contributors to this decrease were Mexico, Belize, Columbia and Panama, with declines of **22%**, **62%**, **83%** and **39%** respectively.

For the January to April period, the Latin American market declined by **6%** with a total of **3,589** visitors compared to **3,797** for the corresponding period in 2003.

The Caribbean

Visitors to Jamaica from the Caribbean region increased by **7%** in April with a total of **4,749** visitors, compared to **4,421** in April 2003.

The major Caribbean countries which provided visitors to Jamaica in April were: the Cayman Islands (**1,536**), Trinidad & Tobago (**678**), Barbados (**626**), the Bahamas (**294**), Bermuda (**224**), St. Lucia (**204**) and Antigua (**161**). Except for Trinidad & Tobago and Bermuda which declined in April, all the other major Caribbean countries recorded increases against April 2003.

Cumulatively, the Caribbean stopover arrivals to Jamaica in the January to April period increased by **6%**, moving from **13,338** in 2003 to **14,136** in 2004. The Cayman Islands continued to be the leading provider of visitors to Jamaica. In the period under review, they provided a total of **4,271** visitors, followed by Trinidad and Tobago with **2,281**, Barbados with **1,701** and the Bahamas with **848** visitors being the other main contributor.

Japan

The Japanese market increased by **34%** in April with a total of **418** stopovers compared to **311** in April 2003.

Cumulatively for the January to April period, a total of **1,776** Japanese visitors came to Jamaica and was up from the **1,357** recorded for the corresponding period in 2003.

Other Countries

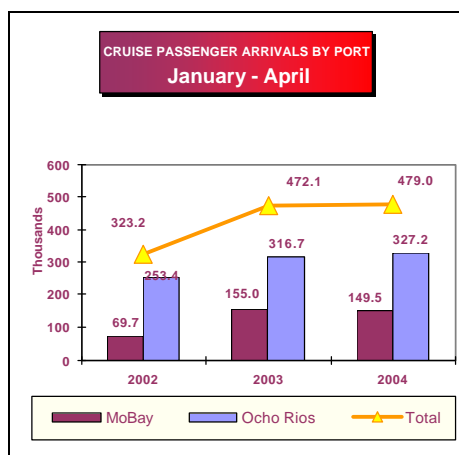
All the other countries, with a total of **936** stopovers in the January to April period recorded a decline of **1%** against the **946** who came for the same period in 2003.

Market Share

The market share of stopover visitors for the January to April period were as follows:

USA **71%**; Canada **9.2%**; UK **10%**; Continental Europe **5.4%**, the Caribbean **2.8%**; Latin America **0.7%**; Japan **0.4%** and Other Countries **0.5%**.

Cruise Passengers



A total of **109,744** cruise passengers visited Jamaica in April 2004. This represents an increase of **1.6%** against the **108,009** recorded for April 2003. Cumulatively, a total of **479,011** cruise passengers visited Jamaica in the January to April period, a **1.5%** increase against the **472,052** recorded for the corresponding period in 2003.

A total of **73,843** cruise passengers visited the port of Ocho Rios in April, a decline of **1%** over the **74,408** recorded for April 2003. For the January to April period cruise passenger arrivals to the port of Ocho Rios was **327,205**, an increase of **3%** against the **316,737** recorded for the corresponding period in 2003.

Montego Bay recorded a total of **35,901** cruise passengers for the month, an increase of **7%** against the **33,601** recorded for 2003. Cumulatively, for the January to April period, cruise passenger arrivals to Montego Bay was **149,531**, a decline of **5%** against the **154,992** recorded for the same period in 2003.

Length of Stay

The average length of stay of stopovers in April was **8.7** nights against **8.9** for April 2003. The average length of stay in hotels was **6.1** nights compared to **6.2** nights in April 2003.

Cumulatively, the average length of stay for the January to April period was **9** nights same as that recorded for the similar period in 2003.

First and Repeat Visitors

Approximately **55%** or **68,644** of the **123,841** Foreign Nationals who visited Jamaica in April were first-time visitors and the other **45%** or **55,197** were repeat guests.

Cumulatively, in the January to April period, some **55%** of the **474,085** Foreign Nationals who visited the island were first-time guests and **45%** were repeat guests.

TABLE 1

TOURIST ARRIVALS

January - April

2004

Month	<----- Stopovers ----->						Total		
	Foreign Nationals	+/- 2004/03	+/- 2004/02	Non-Resident Jamaicans	+/- 2004/03	+/- 2004/02	Stopover Arrivals	+/- 2004/03	+/- 2004/02
January	104,425	8.9%	22.7%	4,925	-9.3%	-1.2%	109,350	7.9%	21.4%
February	115,183	8.2%	20.9%	4,946	-1.4%	4.4%	120,129	7.8%	20.1%
March	130,636	5.2%	5.6%	5,970	11.8%	-8.4%	136,606	5.5%	4.9%
April	123,841	18.4%	31.4%	7,260	-1.6%	12.8%	131,101	17.1%	30.2%
Jan.-Apr.	474,085	10.0%	19.0%	23,101	-0.3%	1.9%	497,186	9.5%	18.1%

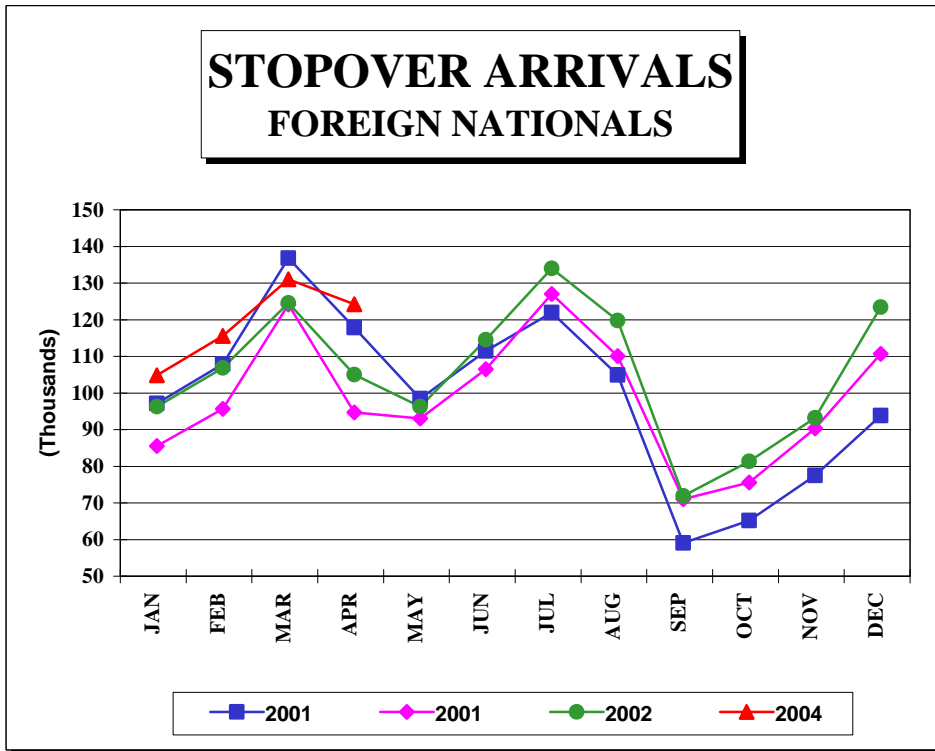


FIG. 1

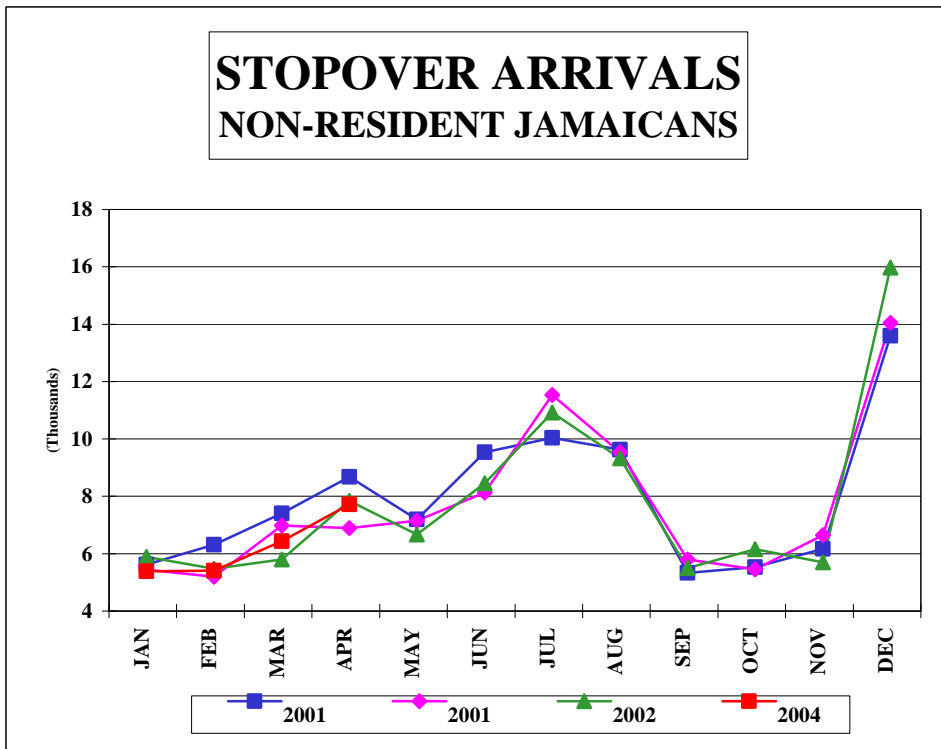


FIG. 1a

TABLE 1.1

First & Repeat Visit to Jamaica

FOREIGN NATIONALS

2004

	Arrivals				TOTAL	% SHARE	
	First Visit	+/-	Repeat Visit	+/-		First Visit	Repeat Visit
Jan.	54,608	6.3	49,817	12.0	104,425	52.3	47.7
Feb.	61,517	8.6	53,666	7.8	115,183	53.4	46.6
Mar.	76,455	3.2	54,181	8.2	130,636	58.5	41.5
Apr.	68,644	19.7	55,197	16.8	123,841	55.4	44.6
Jan.-Apr.	261,224	9.1	212,861	11.1	474,085	55.1	44.9

TABLE 1.2
STOPOVER ARRIVALS BY MARKET REGION
AND MONTH OF ARRIVAL 2004

	U.S.A.					Canada	U.K. Europe	Latin America	Caribbean	Asia	Other Countries	Total
	Northeast	Mid-West	South	West	Total							
January	31,236	23,510	14,108	4,542	73,396	12,336	18,959	766	2,980	521	392	109,350
February	37,653	27,054	14,984	4,183	83,874	12,529	19,008	841	2,822	699	356	120,129
March	42,908	29,393	20,789	5,495	98,585	11,239	21,009	1,209	3,585	686	293	136,606
April	47,843	20,524	22,329	6,670	97,366	9,619	17,658	773	4,749	611	325	131,101
Jan.-Apr.	159,640	100,481	72,210	20,890	353,221	45,723	76,634	3,589	14,136	2,517	1,366	497,186
+/- %	12.9%	8.0%	2.6%	9.5%	9.1%	9.4%	13.2%	-5.5%	6.0%	3.0%	10.1%	9.5%

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	APRIL							JANUARY - APRIL						
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	% Change			<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	% Change		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
U.S.A.														
<u>NORTHEAST (NEW YORK)</u>														
Connecticut	2,743	2,577	2,179	3,182	46.0	23.5	16.0	9,441	8,099	8,608	10,040	16.6	24.0	6.3
Delaware	618	386	491	647	31.8	67.6	4.7	2,120	1,537	1,773	1,939	9.4	26.2	-8.5
Maine	436	415	297	589	98.3	41.9	35.1	1,473	1,216	1,182	1,812	53.3	49.0	23.0
Maryland	3,393	2,576	3,069	3,786	23.4	47.0	11.6	11,435	10,312	11,069	12,507	13.0	21.3	9.4
Massachusetts	3,747	3,019	2,755	3,864	40.3	28.0	3.1	15,417	12,196	12,524	15,127	20.8	24.0	-1.9
New Hampshire	832	621	528	722	36.7	16.3	-13.2	2,809	2,091	2,094	2,652	26.6	26.8	-5.6
New Jersey	6,028	4,621	5,791	7,657	32.2	65.7	27.0	20,870	18,357	20,617	22,909	11.1	24.8	9.8
New York	17,941	11,992	15,367	18,005	17.2	50.1	0.4	59,049	49,913	52,586	58,468	11.2	17.1	-1.0
Pennsylvania	4,542	3,855	4,181	5,477	31.0	42.1	20.6	19,364	17,396	19,423	21,006	8.2	20.8	8.5
Rhode Island	288	370	284	507	78.5	37.0	76.0	1,503	1,294	1,441	1,763	22.3	36.2	17.3
Vermont	357	197	230	349	51.7	77.2	-2.2	1,063	714	807	1,134	40.5	58.8	6.7
Virginia	2,227	1,615	1,885	2,424	28.6	50.1	8.8	7,625	6,632	7,026	7,878	12.1	18.8	3.3
Washington D.C.	530	364	401	389	-3.0	6.9	-26.6	1,837	1,502	1,634	1,554	-4.9	3.5	-15.4
West Virginia	150	105	139	245	76.3	133.3	63.3	741	563	578	851	47.2	51.2	14.8
Total	43,832	32,713	37,597	47,843	27.3	46.3	9.2	154,747	131,822	141,362	159,640	12.9	21.1	3.2
<u>MIDWEST (CHICAGO)</u>														
Illinois	5,009	4,399	4,384	4,739	8.1	7.7	-5.4	21,476	19,438	21,331	21,698	1.7	11.6	1.0
Indiana	1,074	1,000	1,020	1,221	19.7	22.1	13.7	5,123	5,003	5,429	5,447	0.3	8.9	6.3
Iowa	409	408	358	567	58.4	39.0	38.6	3,653	3,615	3,969	4,426	11.5	22.4	21.2
Kansas	296	233	258	340	31.8	45.9	14.9	2,022	1,300	1,499	1,920	28.1	47.7	-5.0
Kentucky	514	362	559	420	-24.9	16.0	-18.3	2,108	1,944	1,969	1,952	-0.9	0.4	-7.4
Michigan	4,177	2,272	3,160	3,769	19.3	65.9	-9.8	15,975	12,199	13,809	14,724	6.6	20.7	-7.8
Minnesota	1,889	1,155	1,761	1,904	8.1	64.8	0.8	12,634	10,967	12,519	12,907	3.1	17.7	2.2
Missouri	1,588	1,188	1,374	1,863	35.6	56.8	17.3	6,651	5,903	6,831	8,256	20.9	39.9	24.1
Nebraska	394	310	231	309	33.8	-0.3	-21.6	2,023	1,362	1,717	1,845	7.5	35.5	-8.8
North Dakota	65	47	70	118	68.6	151.1	81.5	611	559	635	1,040	63.8	86.0	70.2
Ohio	1,953	1,995	1,642	2,010	22.4	0.8	2.9	8,413	8,145	7,186	7,792	8.4	-4.3	-7.4
South Dakota	76	77	67	114	70.1	48.1	50.0	706	576	943	1,048	11.1	81.9	48.4
Wisconsin	3,222	2,059	2,521	3,150	25.0	53.0	-2.2	16,582	14,274	15,242	17,426	14.3	22.1	5.1
Total	20,666	15,505	17,405	20,524	17.9	32.4	-0.7	97,977	85,285	93,079	100,481	8.0	17.8	2.6

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	APRIL			% Change				JANUARY - APRIL			% Change			
	2001	2002	2003	2004	2004/03	2004/02	2004/01	2001	2002	2003	2004	2004/03	2004/02	2004/01
SOUTH (MIAMI)														
Alabama	425	400	385	464	20.5	16.0	9.2	2,188	1,815	2,020	1,971	-2.4	8.6	-9.9
Arkansas	130	168	163	141	-13.5	-16.1	8.5	682	722	824	915	11.0	26.7	34.2
Florida	10,873	9,565	9,690	10,663	10.0	11.5	-1.9	35,001	33,126	32,843	34,516	5.1	4.2	-1.4
Georgia	3,768	4,185	3,904	4,293	10.0	2.6	13.9	12,193	11,937	11,890	11,778	-0.9	-1.3	-3.4
Louisiana	525	432	411	486	18.2	12.5	-7.4	1,515	1,414	1,384	1,358	-1.9	-4.0	-10.4
Mississippi	191	220	162	228	40.7	3.6	19.4	708	787	721	726	0.7	-7.8	2.5
North Carolina	1,533	1,288	1,317	1,861	41.3	44.5	21.4	5,611	5,262	5,534	6,037	9.1	14.7	7.6
Oklahoma	173	195	173	231	33.5	18.5	33.5	953	856	840	1,023	21.8	19.5	7.3
South Carolina	846	663	676	795	17.6	19.9	-6.0	2,587	2,119	2,351	2,422	3.0	14.3	-6.4
Tennessee	913	870	852	1,005	18.0	15.5	10.1	3,500	3,605	3,916	3,708	-5.3	2.9	5.9
Texas	1,646	2,133	1,857	2,162	16.4	1.4	31.3	6,646	8,352	8,045	7,756	-3.6	-7.1	16.7
Total	21,023	20,119	19,590	22,329	14.0	11.0	6.2	71,584	69,995	70,368	72,210	2.6	3.2	0.9
WEST (LOS ANGELES)														
Alaska	28	21	18	20	11.1	-4.8	-28.6	133	109	133	150	12.8	37.6	12.8
Arizona	503	397	297	440	48.1	10.8	-12.5	2,276	1,440	1,262	1,512	19.8	5.0	-33.6
California	4,047	3,187	3,366	4,327	28.6	35.8	6.9	12,010	10,660	10,423	11,838	13.6	11.1	-1.4
Colorado	617	548	557	550	-1.3	0.4	-10.9	2,837	2,644	2,262	2,764	22.2	4.5	-2.6
Hawaii	22	17	11	25	127.3	47.1	13.6	69	51	84	106	26.2	107.8	53.6
Idaho	92	83	67	59	-11.9	-28.9	-35.9	562	375	472	306	-35.2	-18.4	-45.6
Montana	65	62	170	98	-42.4	58.1	50.8	316	317	441	402	-8.8	26.8	27.2
Nevada	196	143	203	295	45.3	106.3	50.5	600	563	739	703	-4.9	24.9	17.2
New Mexico	139	101	68	73	7.4	-27.7	-47.5	472	315	277	311	12.3	-1.3	-34.1
Oregon	183	140	159	217	36.5	55.0	18.6	784	743	780	800	2.6	7.7	2.0
Utah	82	116	134	108	-19.4	-6.9	31.7	356	429	581	470	-19.1	9.6	32.0
Washington	479	405	437	401	-8.2	-1.0	-16.3	1,697	1,393	1,461	1,340	-8.3	-3.8	-21.0
Wyoming	47	57	27	57	111.1	0.0	21.3	160	141	160	188	17.5	33.3	17.5
Total	6,500	5,277	5,514	6,670	21.0	26.4	2.6	22,272	19,180	19,075	20,890	9.5	8.9	-6.2
TOTAL U.S.A.	92,021	73,614	80,106	97,366	21.5	32.3	5.8	346,580	306,282	323,884	353,221	9.1	15.3	1.9

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	APRIL							JANUARY - APRIL						
	2001	2002	2003	2004	% Change			2001	2002	2003	2004	% Change		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
CANADA (TORONTO)														
Alberta	429	446	326	726	122.7	62.8	69.2	2,177	1,720	1,850	3,315	79.2	92.7	52.3
British Columbia	274	255	235	264	12.3	3.5	-3.6	1,470	1,128	1,152	1,445	25.4	28.1	-1.7
Manitoba	163	132	61	135	121.3	2.3	-17.2	1,854	900	1,925	1,656	-14.0	84.0	-10.7
New Brunswick	207	182	132	221	67.4	21.4	6.8	861	606	594	703	18.4	16.0	-18.4
Newfoundland	122	58	64	106	65.6	82.8	-13.1	253	247	251	235	-6.4	-4.9	-7.1
Nova Scotia	425	177	298	353	18.5	99.4	-16.9	1,506	688	974	1,213	24.5	76.3	-19.5
Ontario	7,421	6,326	6,017	6,675	10.9	5.5	-10.1	36,074	30,520	28,634	29,992	4.7	-1.7	-16.9
P.E. Island	11	16	15	33	120.0	106.3	200.0	93	86	105	134	27.6	55.8	44.1
Quebec	1,303	815	692	962	39.0	18.0	-26.2	7,586	5,793	5,477	6,164	12.5	6.4	-18.7
Saskatchewan	79	74	80	127	58.7	71.6	60.8	775	444	758	760	0.3	71.2	-1.9
Other Canada	41	20	17	17	0.0	-15.0	-58.5	205	131	91	106	16.5	-19.1	-48.3
Total	10,475	8,501	7,937	9,619	21.2	13.2	-8.2	52,854	42,263	41,811	45,723	9.4	8.2	-13.5
LONDON OFFICE														
Northern Europe														
U.K.	10,554	9,364	11,456	12,124	5.8	29.5	14.9	39,488	37,572	42,979	49,742	15.7	32.4	26.0
Denmark	87	42	31	47	51.6	11.9	-46.0	317	199	148	257	73.6	29.1	-18.9
Finland	42	19	42	25	-40.5	31.6	-40.5	162	140	258	213	-17.4	52.1	31.5
Norway	97	71	57	50	-12.3	-29.6	-48.5	341	315	330	271	-17.9	-14.0	-20.5
Sweden	103	89	113	103	-8.8	15.7	0.0	622	474	393	479	21.9	1.1	-23.0
Southern Europe														
Greece	14	8	8	24	200.0	200.0	71.4	85	63	113	61	-46.0	-3.2	-28.2
Italy	951	981	2,781	1,877	-32.5	91.3	97.4	5,444	4,520	11,076	9,546	-13.8	111.2	75.3
Portugal	41	100	43	12	-72.1	-88.0	-70.7	105	152	161	138	-14.3	-9.2	31.4
Spain	190	335	266	143	-46.2	-57.3	-24.7	604	682	592	407	-31.3	-40.3	-32.6
Western Europe														
Austria	191	123	153	220	43.8	78.9	15.2	999	693	770	1,324	71.9	91.1	32.5
Belgium	125	87	187	162	-13.4	86.2	29.6	417	389	483	648	34.2	66.6	55.4
France	345	334	270	264	-2.2	-21.0	-23.5	1,150	1,048	989	1,124	13.7	7.3	-2.3
Germany	2,010	972	1,269	1,678	32.2	72.6	-16.5	8,258	4,780	6,002	7,612	26.8	59.2	-7.8
Luxemburg	12	4	8	10	25.0	150.0	-16.7	36	19	26	43	65.4	126.3	19.4
Netherlands	236	160	265	251	-5.3	56.9	6.4	859	631	1,069	1,131	5.8	79.2	31.7
Switzerland	318	176	253	467	84.6	165.3	46.9	1,016	646	814	1,894	132.7	193.2	86.4
Central/East Europe														
Czechoslovakia	22	29	21	14	-33.3	-51.7	-36.4	141	111	163	180	10.4	62.2	27.7
Hungary	14	20	20	4	-80.0	-80.0	-71.4	81	93	71	90	26.8	-3.2	11.1
Poland	32	99	41	38	-7.3	-61.6	18.8	183	250	303	379	25.1	51.6	107.1
Russia	90	110	154	99	-35.7	-10.0	10.0	410	496	507	453	-10.7	-8.7	10.5
Other Europe	61	83	85	46	-45.9	-44.6	-24.6	362	331	462	642	39.0	94.0	77.3
Total	15,535	13,206	17,523	17,658	0.8	33.7	13.7	61,080	53,604	67,709	76,634	13.2	43.0	25.5

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	APRIL							JANUARY - APRIL						
	2001	2002	2003	2004	% Change			2001	2002	2003	2004	% Change		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
<u>LATIN AMERICA</u>														
<u>CENTRAL AMERICA</u>														
Mexico	298	185	191	149	-22.0	-19.5	-50.0	857	598	592	769	29.9	28.6	-10.3
Belize	35	51	135	52	-61.5	2.0	48.6	145	164	447	160	-64.2	-2.4	10.3
Costa Rica	50	51	36	42	16.7	-17.6	-16.0	216	241	171	185	8.2	-23.2	-14.4
El Salvador	13	18	26	8	-69.2	-55.6	-38.5	44	77	52	28	-46.2	-63.6	-36.4
Guatemala	27	36	20	34	70.0	-5.6	25.9	103	129	103	108	4.9	-16.3	4.9
Honduras	56	14	12	17	41.7	21.4	-69.6	86	47	56	90	60.7	91.5	4.7
Nicaragua	2	4	1	5	400.0	25.0	150.0	15	26	11	21	90.9	-19.2	40.0
Panama	110	87	91	56	-38.5	-35.6	-49.1	456	335	363	364	0.3	8.7	-20.2
Total	591	446	512	363	-29.1	-18.6	-38.6	1,922	1,617	1,795	1,725	-3.9	6.7	-10.2
<u>SOUTH AMERICA</u>														
Argentina	161	37	33	42	27.3	13.5	-73.9	623	174	195	190	-2.6	9.2	-69.5
Bolivia	4	3	3	4	33.3	33.3	0.0	25	19	22	15	-31.8	-21.1	-40.0
Brazil	136	81	43	48	11.6	-40.7	-64.7	372	325	245	335	36.7	3.1	-9.9
Chile	52	116	19	21	10.5	-81.9	-59.6	266	272	130	189	45.4	-30.5	-28.9
Colombia	153	49	149	26	-82.6	-46.9	-83.0	546	200	394	108	-72.6	-46.0	-80.2
Ecuador	24	24	6	3	-50.0	-87.5	-87.5	83	64	14	34	142.9	-46.9	-59.0
Guyana	155	135	132	159	20.5	17.8	2.6	512	405	522	541	3.6	33.6	5.7
Paraguay	0	2	2	0	-	-100.0	ERR	7	9	7	9	28.6	0.0	28.6
Peru	32	31	52	22	-57.7	-29.0	-31.3	101	106	123	104	-15.4	-1.9	3.0
Surinam	9	11	37	19	-48.6	72.7	111.1	114	44	104	79	-24.0	79.5	-30.7
Uruguay	10	8	4	8	100.0	0.0	-20.0	39	31	20	43	115.0	38.7	10.3
Venezuela	177	74	46	57	23.9	-23.0	-67.8	574	298	222	216	-2.7	-27.5	-62.4
Other South America	2	0	3	1	-	-	-	2	0	4	1	-	-	-
Total	915	571	529	410	-22.5	-28.2	-55.2	3,264	1,947	2,002	1,864	-6.9	-4.3	-42.9
Total Latin America	1,506	1,017	1,041	773	-25.7	-24.0	-48.7	5,186	3,564	3,797	3,589	-5.5	0.7	-30.8

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	APRIL							JANUARY - APRIL						
	2001	2002	2003	2004	% Change			2001	2002	2003	2004	% Change		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
CARIBBEAN														
Antigua	181	96	154	161	4.5	67.7	-11.0	435	387	441	593	34.5	53.2	36.3
Bahamas	689	307	266	294	10.5	-4.2	-57.3	1,952	1,160	823	848	3.0	-26.9	-56.6
Barbados	378	344	502	626	24.7	82.0	65.6	1,284	1,376	1,613	1,701	5.5	23.6	32.5
Bermuda	177	139	231	224	-3.0	61.2	26.6	522	531	791	687	-13.1	29.4	31.6
British Virgin Is.	39	27	43	64	48.8	137.0	64.1	129	107	133	220	65.4	105.6	70.5
Cayman Is.	1,472	928	1,221	1,536	25.8	65.5	4.3	3,891	3,094	3,589	4,271	19.0	38.0	9.8
Dominica	35	26	38	27	-28.9	3.8	-22.9	134	72	109	83	-23.9	15.3	-38.1
Grenada	68	33	57	63	10.5	90.9	-7.4	174	153	179	183	2.2	19.6	5.2
Monsterrat	10	3	16	4	-75.0	33.3	-60.0	32	17	36	29	-19.4	70.6	-9.4
St. Kitts/Nevis/Anguilla	75	56	66	134	103.0	139.3	78.7	191	165	209	305	45.9	84.8	59.7
St. Lucia	192	108	153	204	33.3	88.9	6.3	430	361	555	538	-3.1	49.0	25.1
St. Vincent	52	50	41	40	-2.4	-20.0	-23.1	151	157	146	164	12.3	4.5	8.6
Turks & Caicos Is.	166	78	122	99	-18.9	26.9	-40.4	300	230	281	325	15.7	41.3	8.3
Trinidad & Tobago	699	592	771	678	-12.1	14.5	-3.0	2,228	2,076	2,267	2,281	0.6	9.9	2.4
Comm. Caribbean	4,233	2,787	3,681	4,154	12.8	49.0	-1.9	11,853	9,886	11,172	12,228	9.5	23.7	3.2
Aruba	18	22	75	35	-53.3	59.1	94.4	69	99	182	97	-46.7	-2.0	40.6
Bonaire	0	0	8	10	-	-	-	0	0	8	14	-	-	-
Cuba	62	37	45	26	-42.2	-29.7	-58.1	233	210	206	158	-23.3	-24.8	-32.2
Curacao	37	95	276	105	-62.0	10.5	183.8	134	249	521	287	-44.9	15.3	114.2
Dominican Republic	72	115	77	119	54.5	3.5	65.3	253	320	234	341	45.7	6.6	34.8
Guadelope	9	5	10	37	270.0	640.0	311.1	24	24	27	75	177.8	212.5	212.5
Haiti	37	45	50	18	-64.0	-60.0	-51.4	134	196	260	108	-58.5	-44.9	-19.4
Puerto Rico	135	147	97	129	33.0	-12.2	-4.4	518	561	402	504	25.4	-10.2	-2.7
St. Maarten	42	33	56	41	-26.8	24.2	-2.4	141	112	158	156	-1.3	39.3	10.6
All other Caribbean	36	33	46	75	63.0	127.3	108.3	145	117	168	168	0.0	43.6	15.9
Other Caribbean	448	532	740	595	-19.6	11.8	32.8	1,651	1,888	2,166	1,908	-11.9	1.1	15.6
TOTAL CARIBBEAN	4,681	3,319	4,421	4,749	7.4	43.1	1.5	13,504	11,774	13,338	14,136	6.0	20.1	4.7
OTHER COUNTRIES														
African Countries	212	92	74	58	-21.6	-37.0	-72.6	463	258	240	306	27.5	18.6	-33.9
Isreal	66	46	90	85	-5.6	84.8	28.8	345	216	262	314	19.8	45.4	-9.0
Saudi Arabia	1	3	3	1	-66.7	-66.7	0.0	13	5	9	4	-55.6	-20.0	-69.2
Turkey	21	12	9	18	100.0	50.0	-14.3	96	49	54	71	31.5	44.9	-26.0
Other Middle East	38	32	19	23	21.1	-28.1	-39.5	125	84	69	73	5.8	-13.1	-41.6
India & Pakistan	72	42	62	52	-16.1	23.8	-27.8	260	172	164	191	16.5	11.0	-26.5
Japan	624	479	311	418	34.4	-12.7	-33.0	2,303	1,569	1,357	1,776	30.9	13.2	-22.9
China	69	36	20	43	115.0	19.4	-37.7	187	172	209	141	-32.5	-18.0	-24.6
Taiwan	8	12	5	1	-80.0	-91.7	-87.5	29	24	29	13	-55.2	-45.8	-55.2
Korea	31	13	9	10	11.1	-23.1	-67.7	109	75	62	79	27.4	5.3	-27.5
Philippines	55	106	105	43	-59.0	-59.4	-21.8	197	242	509	206	-59.5	-14.9	4.6
Singapore	16	10	3	8	166.7	-20.0	-50.0	54	22	31	43	38.7	95.5	-20.4
Other Asia	46	21	17	36	111.8	71.4	-21.7	146	65	82	109	32.9	67.7	-25.3
Australia	141	101	185	103	-44.3	2.0	-27.0	510	440	531	455	-14.3	3.4	-10.8
New Zealand	37	22	34	33	-2.9	50.0	-10.8	100	96	73	89	21.9	-7.3	-11.0
All Other Ctries	6	5	0	4	-	-20.0	-33.3	23	20	3	13	333.3	-35.0	-43.5
Total	1,443	1,032	946	936	-1.1	-9.3	-35.1	4,960	3,509	3,684	3,883	5.4	10.7	-21.7
GRAND TOTAL	125,661	100,689	111,974	131,101	17.1	30.2	4.3	484,164	420,996	454,223	497,186	9.5	18.1	2.7

STOPOVER VISITORS BY MARKET SHARE

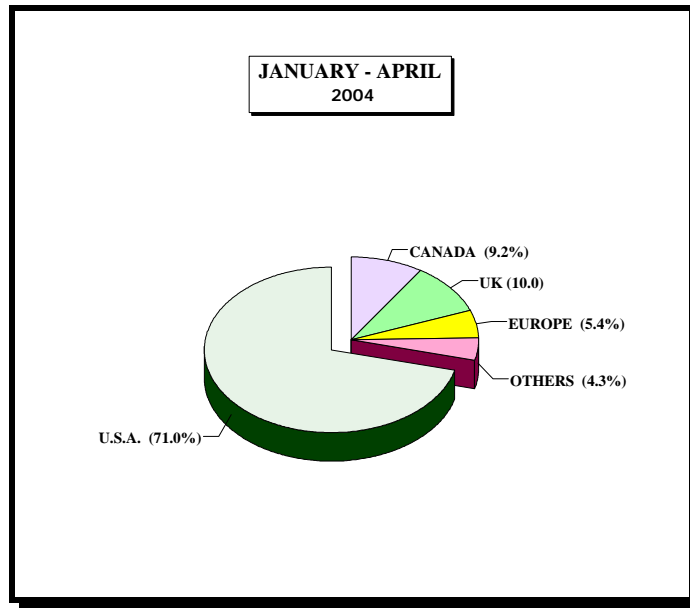


Fig. 2

Country	April 2004	% Share	Jan. - Apr. 2004	% Share	Jan. - Apr. 2003	% Share	%Change 2004/03
U.S.A	97,366	74.3%	353,221	71.0%	324,286	71.4%	8.9%
CANADA	9,619	7.3%	45,723	9.2%	41,811	9.2%	9.4%
U.K.	12,124	9.2%	49,742	10.0%	42,979	9.5%	15.7%
EUROPE	5,534	4.2%	26,892	5.4%	24,730	5.4%	8.7%
OTHERS	6,458	4.9%	21,608	4.3%	20,417	4.5%	5.8%
Total	131,101	100.0%	497,186	100.0%	454,223	100.0%	9.5%

TABLE 3

<u>AVERAGE LENGTH OF STAY (Nights)</u>					
<u>FOREIGN NATIONALS</u>					
	All Types of Accommodation			Hotel	
	2003	2004		2003	2004
January	10.1	9.8		6.6	6.7
February	8.8	8.9		6.3	6.5
March	8.5	8.6		6.1	6.2
April	8.9	8.7		6.2	6.1
Jan. - Apr.	9.0	9.0		6.3	6.4

Note: LENGTH OF STAY IS BASED ON INTENDED LENGTH OF STAY

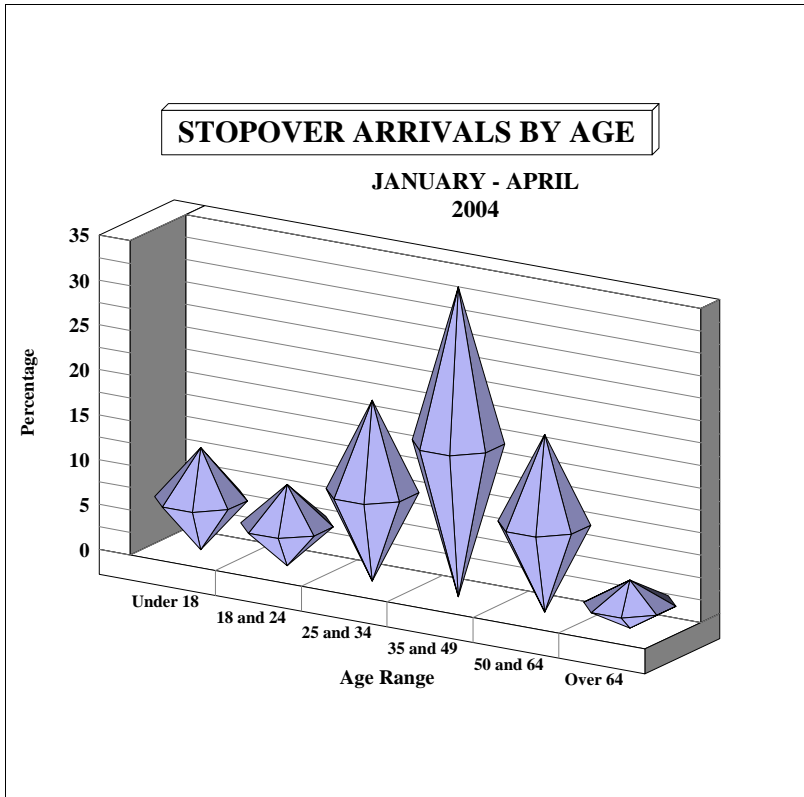


Fig. 3

AGE DISTRIBUTION OF STOPOVER ARRIVALS

Age	APRIL		JAN. - APR.		JAN. - APR.		%Change 2004/03
	2004	% Share	2004	% Share	2003	% Share	
Under 18	19,256	14.7	56,406	11.3	49,132	10.8	14.8%
18 and 24	8,799	6.7	44,772	9.0	42,104	9.3	6.3%
25 and 34	29,221	22.3	99,936	20.1	95,346	21.0	4.8%
35 and 49	45,354	34.6	171,489	34.5	157,086	34.6	9.2%
50 and 64	22,659	17.3	98,437	19.8	87,977	19.4	11.9%
Over 64	5,812	4.4	26,146	5.3	22,578	5.0	15.8%
Total	131,101	100.0	497,186	100.0	454,223	100.0	9.5%

TABLE 4**CRUISE PASSENGER ARRIVALS BY MONTH AND PORT OF CALL
JANUARY - APRIL 2004**

	MONTEGO BAY		% Change 2004/03		OCHO RIOS		% Change 2004/03		2004 TOTAL		2003 TOTAL		% Change 2004/03	
	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX
January	22	34,283	-12.0%	-21.8%	42	89,072	20.0%	18.8%	67	124,650	60	118,834	11.7%	4.9%
February	24	37,643	0.0%	-3.5%	31	77,443	-11.4%	0.1%	56	115,351	60	116,451	-6.7%	-0.9%
March	23	41,704	-14.8%	8.2%	34	86,847	-17.1%	-3.4%	58	129,266	69	128,758	-15.9%	0.4%
April	17	35,901	-10.5%	6.8%	29	73,843	-3.3%	-0.8%	46	109,744	49	108,009	-6.1%	1.6%
Jan. - Apr.	86	149,531	-9.5%	-3.5%	136	327,205	-3.5%	3.3%	227	479,011	238	472,052	-4.6%	1.5%

- * Note:
1. During the month of January three Cruise Ship calls with 1,668 Cruise passengers visited two ports.
 2. Included in the total Cruise passengers for the month of January, 3 calls with 1,295 passengers visited Port Antoinio.
 3. During the month of February 1 Cruise Ship call with 1,174 Cruise passengers visited two ports.
 4. Included in the total Cruise passengers for the month of February, 1 calls with 265 passengers visited Port Antoinio.
 5. Included in the total Cruise passengers for the month of March, 1 call with 715 passengers visited Port Antoinio.
 6. During the month of April 1 Cruise Ship call with 1,181 Cruise passengers visited two ports.

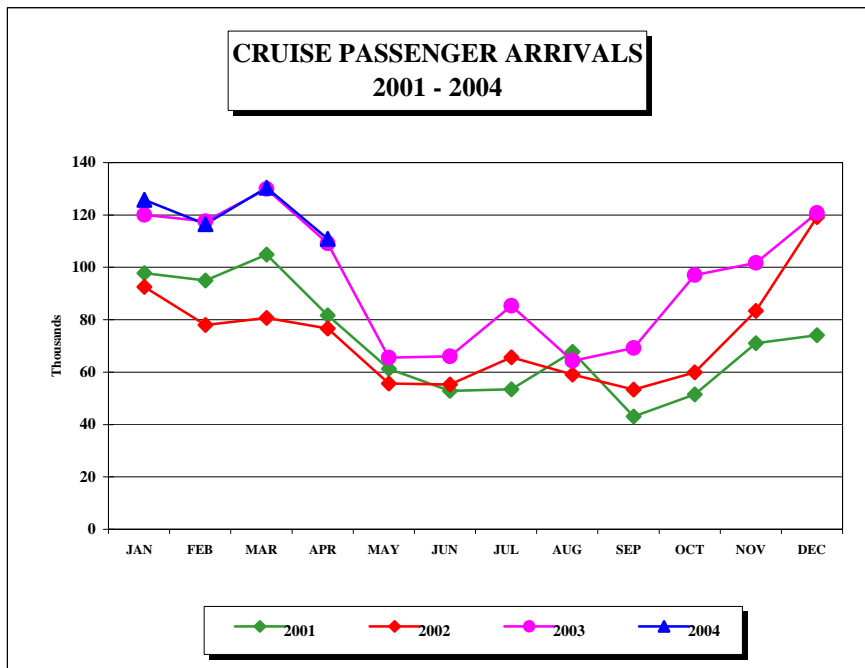


FIG. 4

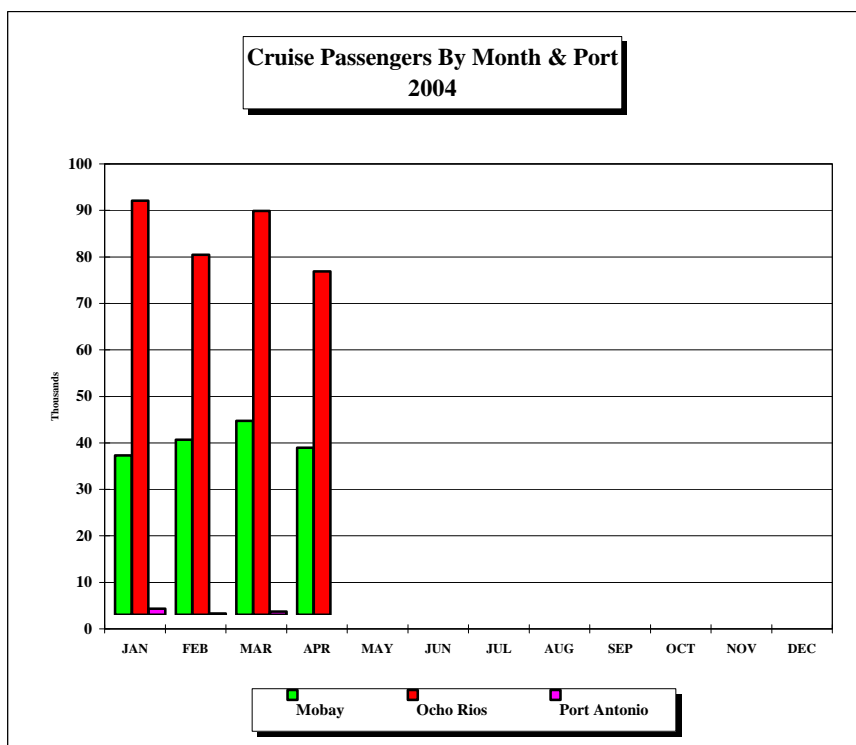


FIG. 4a

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	<u>APRIL 2004</u>			<u>JANUARY - APRIL 2004</u>		
	<u>SCHEDULED AIRLINES</u>	<u>CHARTERED AIRLINES</u>	<u>TOTAL STOPOVERS</u>	<u>SCHEDULED AIRLINES</u>	<u>CHARTERED AIRLINES</u>	<u>TOTAL STOPOVERS</u>
U.S.A.						
<u>NORTHEAST (NEW YORK)</u>						
Connecticut	3,179	3	3,182	9,856	184	10,040
Delaware	646	1	647	1,921	18	1,939
Maine	589	0	589	1,789	23	1,812
Maryland	3,782	4	3,786	12,191	316	12,507
Massachusetts	3,861	3	3,864	14,701	426	15,127
New Hampshire	722	0	722	2,580	72	2,652
New Jersey	7,653	4	7,657	22,580	329	22,909
New York	17,603	402	18,005	57,127	1,341	58,468
Pennsylvania	5,468	9	5,477	20,356	650	21,006
Rhode Island	505	2	507	1,738	25	1,763
Vermont	348	1	349	1,113	21	1,134
Virginia	2,420	4	2,424	7,598	280	7,878
Washington D.C.	389	0	389	1,509	44	1,553
West Virginia	243	2	245	784	68	852
Total	<u>47,408</u>	<u>435</u>	<u>47,843</u>	<u>155,843</u>	<u>3,797</u>	<u>159,640</u>
<u>MIDWEST (CHICAGO)</u>						
Illinois	2,985	1,754	4,739	11,821	9,877	21,698
Indiana	975	246	1,221	4,188	1,259	5,447
Iowa	425	142	567	2,860	1,566	4,426
Kansas	293	47	340	1,615	305	1,920
Kentucky	405	15	420	1,774	178	1,952
Michigan	2,974	795	3,769	10,566	4,158	14,724
Minnesota	1,295	609	1,904	7,606	5,301	12,907
Missouri	599	1,264	1,863	2,643	5,613	8,256
Nebraska	299	10	309	1,775	70	1,845
North Dakota	111	7	118	746	294	1,040
Ohio	1,889	121	2,010	6,804	988	7,792
South Dakota	104	10	114	900	148	1,048
Wisconsin	1,782	1,368	3,150	9,529	7,897	17,426
Total	<u>14,136</u>	<u>6,388</u>	<u>20,524</u>	<u>62,827</u>	<u>37,654</u>	<u>100,481</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

APRIL 2004

JANUARY - APRIL 2004

	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>SOUTH (MIAMI)</u>						
Alabama	464	0	464	1,958	13	1,971
Arkansas	136	5	141	871	44	915
Florida	10,656	7	10,663	34,388	128	34,516
Georgia	4,288	5	4,293	11,733	45	11,778
Louisiana	485	1	486	1,344	14	1,358
Mississippi	223	5	228	708	18	726
North Carolina	1,861	0	1,861	5,863	174	6,037
Oklahoma	229	2	231	981	42	1,023
South Carolina	794	1	795	2,385	37	2,422
Tennessee	993	12	1,005	3,630	78	3,708
Texas	2,160	2	2,162	7,687	69	7,756
Total	<u>22,289</u>	<u>40</u>	<u>22,329</u>	<u>71,548</u>	<u>662</u>	<u>72,210</u>
<u>WEST (LOS ANGELES)</u>						
Alaska	14	3	17	135	12	147
Arizona	438	5	443	1,464	51	1,515
California	4,305	22	4,327	11,691	147	11,838
Colorado	424	126	550	1,892	872	2,764
Hawaii	25	0	25	102	4	106
Idaho	58	1	59	305	1	306
Montana	98	0	98	390	12	402
Nevada	292	3	295	684	19	703
New Mexico	73	0	73	301	10	311
Oregon	216	1	217	788	12	800
Utah	102	6	108	462	8	470
Washington	388	13	401	1,284	56	1,340
Wyoming	48	9	57	154	34	188
Total	<u>6,481</u>	<u>189</u>	<u>6,670</u>	<u>19,652</u>	<u>1,238</u>	<u>20,890</u>
TOTAL U.S.A.	<u>90,314</u>	<u>7,052</u>	<u>97,366</u>	<u>309,870</u>	<u>43,351</u>	<u>353,221</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	APRIL 2004			JANUARY - APRIL 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CANADA (TORONTO)</u>						
Alberta	719	7	726	3,279	36	3,315
British Columbia	260	4	264	1,419	26	1,445
Manitoba	130	5	135	1,613	43	1,656
New Brunswick	216	5	221	674	29	703
Newfoundland	93	13	106	211	24	235
Nova Scotia	350	3	353	1,182	31	1,213
Ontario	4,871	1,804	6,675	19,307	10,685	29,992
P.E. Island	33	0	33	134	0	134
Quebec	701	261	962	4,222	1,942	6,164
Saskatchewan	125	0	125	747	11	758
Other Canada	16	3	19	91	17	108
Total	7,514	2,105	9,619	32,879	12,844	45,723
<u>LONDON OFFICE</u>						
<u>Northern Europe</u>						
U.K.	8,185	3,939	12,124	31,961	17,781	49,742
Denmark	47	0	47	253	4	257
Finland	25	0	25	207	6	213
Norway	50	0	50	264	7	271
Sweden	101	2	103	470	9	479
<u>Southern Europe</u>						
Greece	24	0	24	52	9	61
Italy	604	1,273	1,877	3,203	6,343	9,546
Portugal	12	0	12	135	3	138
Spain	142	1	143	379	28	407
<u>Western Europe</u>						
Austria	185	35	220	808	516	1,324
Belgium	161	1	162	635	13	648
France	242	22	264	1,061	63	1,124
Germany	1,666	12	1,678	7,521	91	7,612
Luxemburg	10	0	10	43	0	43
Netherlands	251	0	251	1,123	8	1,131
Switzerland	170	297	467	668	1,226	1,894
<u>Central/East Europe</u>						
Czechoslovakia	14	0	14	169	11	180
Hungary	3	1	4	83	7	90
Poland	36	2	38	373	6	379
Russia	98	1	99	440	13	453
Other Europe	45	1	46	442	200	642
Total	12,071	5,587	17,658	50,290	26,344	76,634

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	APRIL 2004			JANUARY - APRIL 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>OTHER COUNTRIES</u>						
<u>CENTRAL AMERICA</u>						
Mexico	149	0	149	571	198	769
Belize	52	0	52	160	0	160
Costa Rica	42	0	42	185	0	185
El Salvador	8	0	8	28	0	28
Guatemala	34	0	34	107	1	108
Honduras	17	0	17	90	0	90
Nicaragua	5	0	5	21	0	21
Panama	56	0	56	364	0	364
Total	363	0	363	1,526	199	1,725
<u>SOUTH AMERICA</u>						
Argentina	42	0	42	189	1	190
Bolivia	4	0	4	15	0	15
Brazil	48	0	48	331	4	335
Chile	21	0	21	188	1	189
Colombia	26	0	26	108	0	108
Ecuador	3	0	3	33	1	34
Guyana	158	1	159	540	1	541
Paraguay	0	0	0	9	0	9
Peru	22	0	22	103	1	104
Surinam	19	0	19	78	1	79
Uruguay	8	0	8	43	0	43
Venezuela	55	2	57	214	2	216
Other South America	1	0	1	1	0	1
Total	407	3	410	1,852	12	1,864
Total Latin America	770	3	773	3,378	211	3,589

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	<u>APRIL 2004</u>			<u>JANUARY - APRIL 2004</u>		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CARIBBEAN</u>						
Antigua	161	0	161	592	1	593
Bahamas	292	2	294	844	4	848
Barbados	626	0	626	1,700	1	1,701
Bermuda	224	0	224	685	2	687
British Virgin Is.	64	0	64	220	0	220
Cayman Is.	1,536	0	1,536	4,271	0	4,271
Dominica	27	0	27	83	0	83
Grenada	62	1	63	182	1	183
Monsterrat	4	0	4	29	0	29
St. Kitts/Nevis/Anguilla	134	0	134	305	0	305
St. Lucia	204	0	204	538	0	538
St. Vincent	40	0	40	163	1	164
Turks & Caicos Is.	99	0	99	325	0	325
Trinidad & Tobago	676	2	678	2,278	3	2,281
Comm. Caribbean	4,149	5	4,154	12,215	13	12,228
Aruba	35	0	35	97	0	97
Bonaire	10	0		14	0	14
Cuba	26	0	26	154	4	158
Curacao	105	0	105	287	0	287
Dominican Republic	119	0	119	337	4	341
Guadelope	37	0	37	75	0	75
Haiti	18	0	18	108	0	108
Puerto Rico	129	0	129	501	3	504
St. Maarten	41	0	41	156	0	156
All other Caribbean	75	0	75	168	0	168
Other Caribbean	595	0	595	1,897	11	1,908
TOTAL CARIBBEAN	4,744	5	4,749	14,112	24	14,136
<u>OTHER COUNTRIES</u>						
African Countries	58	0	58	295	11	306
Isreal	85	0	85	312	2	314
Saudi Arabia	1	0	1	4	0	4
Turkey	16	2	18	63	5	68
Other Middle East	21	2	23	61	15	76
India & Pakistan	52	0	52	184	7	191
Japan	418	0	418	1,772	4	1,776
China	43	0	43	137	4	141
Taiwan	1	0	1	13	0	13
Korea	10	0	10	77	2	79
Philippines	43	0	43	206	0	206
Singapore	8	0	8	42	1	43
Other Asia	36	0	36	107	2	109
Australia	103	0	103	453	2	455
New Zealand	32	1	33	86	3	89
All Other Ctries	4	0	4	13	0	13
Total	931	5	936	3,825	58	3,883
GRAND TOTAL	116,344	14,757	131,101	414,354	82,832	497,186

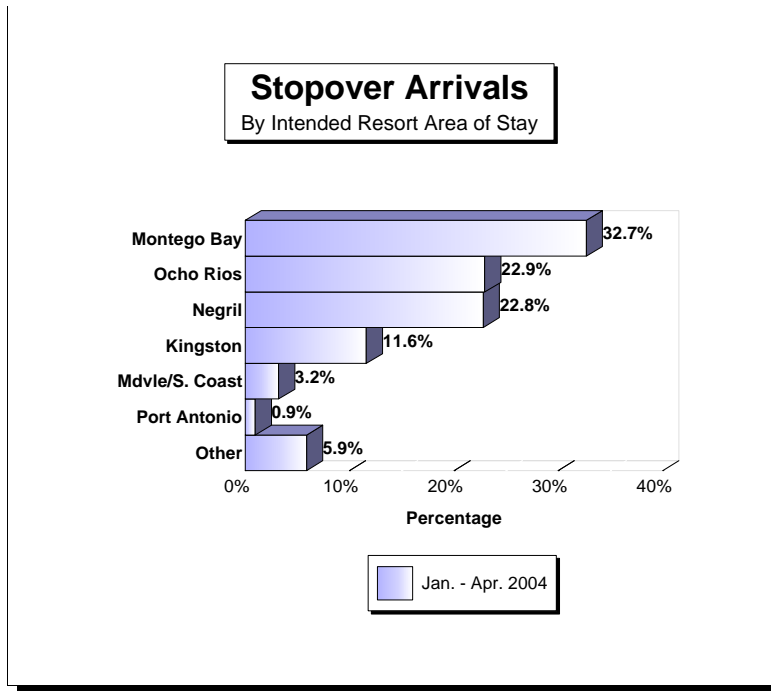


Fig. 5

STOPOVER ARRIVALS BY INTENDED AREA OF STAY

Area	APRIL		JAN.- APR.		JAN.- APR.		%Change 2004/03
	2004	%Share	2004	%Share	2003	%Share	
Montego Bay	43,046	32.8%	162,388	32.7%	149,431	32.9%	8.7%
Ocho Rios	30,356	23.2%	114,087	22.9%	100,816	22.2%	13.2%
Negril	27,316	20.8%	113,331	22.8%	103,883	22.9%	9.1%
Kingston	16,002	12.2%	57,632	11.6%	55,098	12.1%	4.6%
Mdvle/S. Coast	4,347	3.3%	15,851	3.2%	13,884	3.1%	14.2%
Port Antonio	1,173	0.9%	4,717	0.9%	4,094	0.9%	15.2%
Other	8,861	6.8%	29,180	5.9%	27,017	5.9%	8.0%
Total	131,101	100.0%	497,186	100.0%	454,223	100.0%	9.5%