

JAMAICA TOURIST BOARD

IN FEBRUARY 2004.....

- Stopover arrivals were up by 8%
- US Market increased by 6%
- Canada increased by 9%
- Europe increased by 13%
- Cruise Passenger arrivals down by 1%.

TOURIST (Stopovers)

Stopover arrivals in February 2004 were **120,129**, an increase of **8%** over the **111,458** recorded for February 2003. For the January to February period arrivals increased by **8%** with **229,479** compared to **212,764** in 2003.

United States

Stopover arrivals from the United States market increased by **6%** in February with a total of **83,874** visitors compared to the **78,854** visitors who came in February 2003. The four marketing regions recorded growth. The Northeast and the Midwest increased by **8%** each, the South by **1%** and the West by **5%**.

For the January to February period the US market increased by **7%**. Total visitors from that market for the period was **157,270** compared to **147,368** for the corresponding period in 2003. For the two-month period January to February, three of the main marketing regions recorded growth. The Northeast and the Midwest increased by **9%** each and the West by **8%**. The South declined by **1%**.

Canada

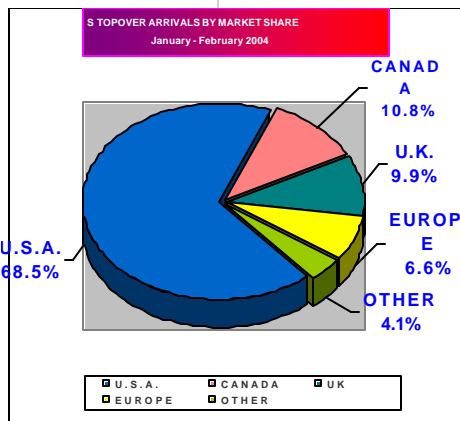
In February, the Canadian market increased by **9%** with a total of **12,529** stopovers compared to **11,506** in February 2003. The leading province, Ontario increased by **5%**, and the second most important visitor-producing province, Quebec increased by **30%**. For the other leading provinces, Alberta increased by **71%**, British Columbia by **28%**, and New Brunswick by **48%**.

Cumulatively, the Canadian market increased by **8%** in the January to February period with a total of **24,865** stopovers compared to **23,095** in 2003. The main provinces Ontario and Quebec recorded increases of **2%** and **21%** respectively. The other notable increases were Alberta **71%**, British Columbia **15%**, Nova Scotia **18%** and New Brunswick **26%** albeit from small bases.

Europe

The European market continued to be vibrant, recording a **13%** increase in February 2004. The market provided a total of **19,008** stopover visitors compared to the **16,812** recorded in February 2003. The United Kingdom and Germany increased by **11%** and **30%** respectively. The other leading countries which showed increases were: Austria (**71%**), Sweden (**58%**), Switzerland (**144%**), and France (**29%**), despite from relatively small bases.

Cumulatively, for the January to February period, the European market increased by **15%**. Total stopovers for the period was **37,967** compared to **33,098** in 2003. The United Kingdom with a total of **22,819** stopovers increased by **13%** and Germany with a total of **3,953** also increased by **27%**.



Latin America

The Latin American market increased by **8%** in February with a total of **841** stopovers compared to **777** in February 2003. Except for Brazil which declined by **9%**, all the other leading countries recorded increases. Mexico (**8%**), Argentina (**4%**), Chile and Colombia (**10%**) each.

For the January to February period, the Latin American market declined by **14%** with a total of **1,607** visitors compared to **1,864** for the corresponding period in 2003.

The Caribbean

Visitors to Jamaica from the Caribbean region increased by **5%** in February. A total of **2,822** visitors from other Caribbean countries visited Jamaica, up from **2,695** in February 2003.

The major Caribbean countries which provided visitors to Jamaica in February were: the Cayman Islands (**836**), Trinidad and Tobago (**462**), Barbados (**305**), the Bahamas (**166**), Antigua (**162**), Bermuda (**133**), and St. Lucia (**90**). Except for Bermuda and St. Lucia which declined in February, all the other major Caribbean countries recorded increases against February 2003.

Cumulatively, the Caribbean stopover arrivals to Jamaica in the January to February period increased by **4%**, moving from **5,598** in 2003 to **5,802** in 2004. The Cayman Islands continued to be the leading provider of visitors to Jamaica from other Caribbean countries. In the period under review, they provided a total of **1,777** visitors, followed by Trinidad and Tobago with **947**, Barbados with **605** and the Bahamas with **352** visitors being the other main contributor.

Japan

The Japanese market increased by **47%** in February with a total of **542** stopovers compared to **368** in February 2003. Cumulatively for the January to February period, a total of **886** Japanese visitors came to Jamaica and was up from the **686** recorded for the corresponding period in 2003.

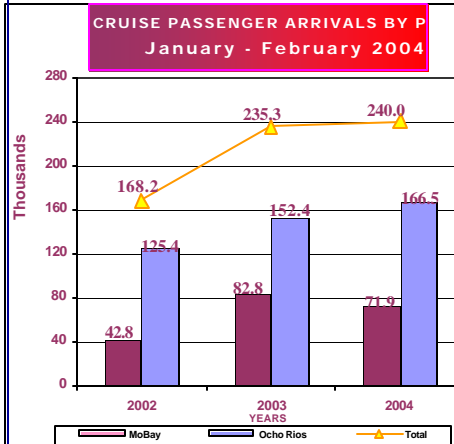
Other Countries

Of the other countries, Australia with a total of **233** stopovers in the January to February recorded an increase of **6%** against the **219** who came for the same period in 2003.

Market Share

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

USA **68.5%**; Canada **10.8%**; UK **9.9%**; Continental Europe **6.6%**, the Caribbean **2.5%**; Latin America **0.7%**; Japan **0.4%** and Other Countries **0.5%**.



Cruise Passengers

A total of **115,351** cruise passengers visited Jamaica in February 2004. This represents a decline of **1%** against the **116,451** recorded for February 2003. Cumulatively, a total of **240,001** cruise passengers visited Jamaica in the January to February period, a **2%** increase against the **235,285** recorded for the corresponding period in 2003.

A total of **77,443** cruise passengers visited the port of Ocho Rios in February, an increase of under **1%** over the **77,390** recorded for February 2003. For the January to February period cruise passenger arrivals to the port of Ocho Rios was **166,515** an increase of **9%** against the **152,397** recorded for the corresponding period in 2003.

Montego Bay recorded a total of **37,643** cruise passengers for the month, a decline of **4%** against the **39,006** recorded for 2003. Cumulatively, for the January to February period, cruise passenger arrivals to Montego Bay was **71,926**, a decline of **13%** against the **82,833** recorded for the same period in 2003.

Length of Stay

The average length of stay of stopovers in February was **8.9** nights against **8.8** for February 2003. The average length of stay in hotels was **6.5** nights compared to **6.3** nights in February 2003. Cumulatively, the average length of stay for the January to February period was **9.8** nights against the **9.4** nights recorded for the similar period in 2003.

First and Repeat Visitors

Approximately **53%** or **61,517** of the **115,183** foreign nationals who visited Jamaica in February were first-time visitors and the other **47%** or **53,666** were repeat guests.

Cumulatively, in the January to February period, some **53%** of the **219,608** Foreign Nationals who visited the island were first-time guests and **47%** were repeat guests.

TABLE 1

TOURIST ARRIVALS

January - February

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%
Jan.-Feb.	219,608	8.5%	21.7%	9,871	-5.5%	1.6%	229,479	7.9%	20.7%

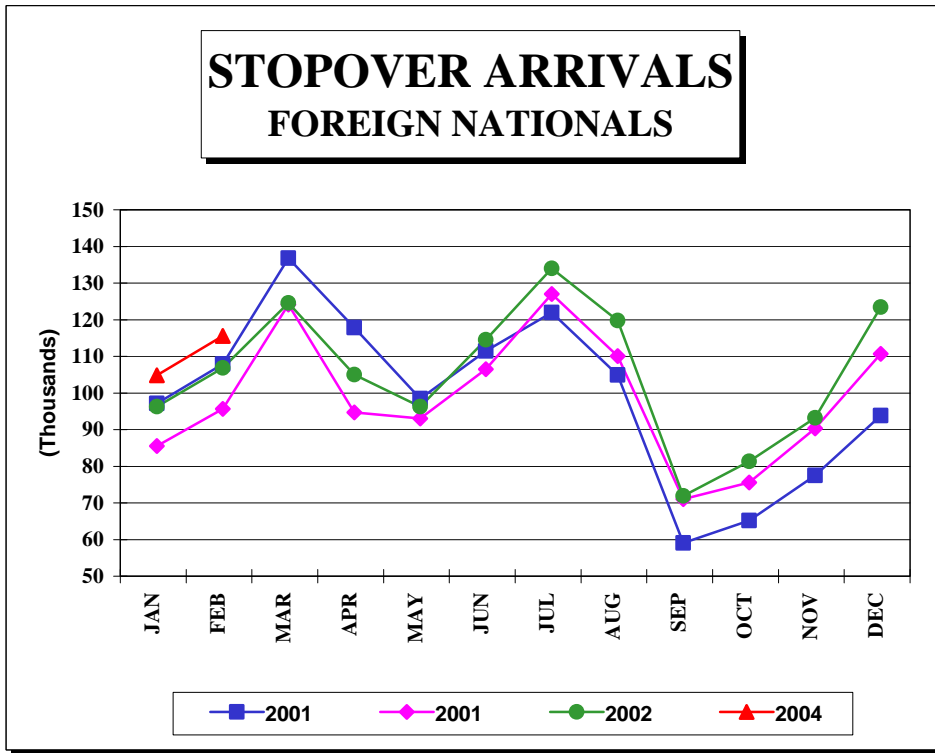


FIG. 1

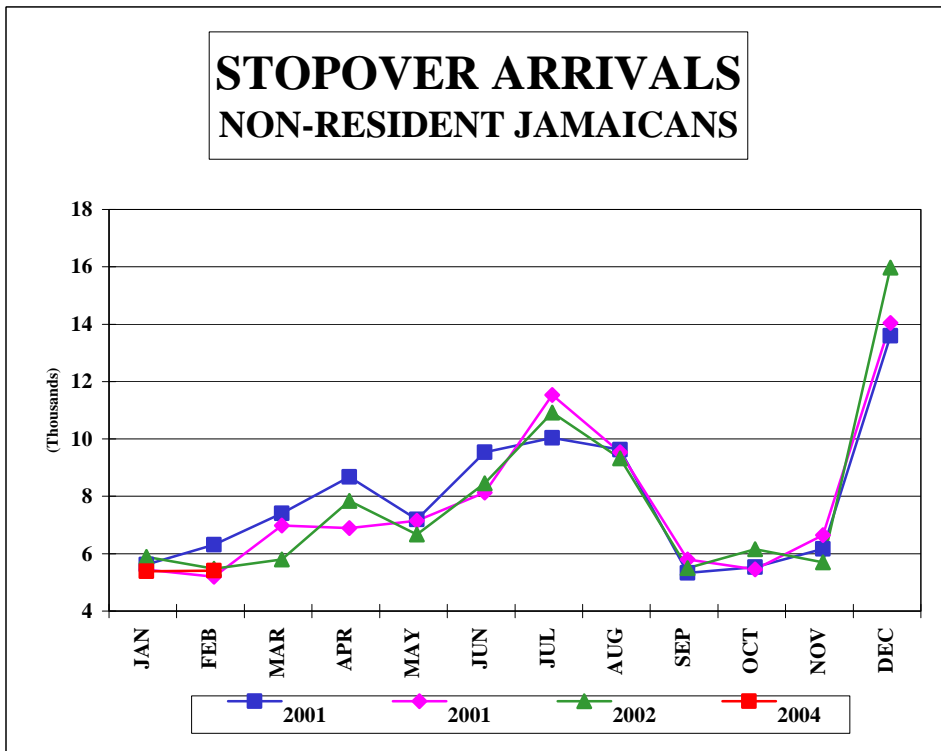


FIG. 1a

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
Jan.-Feb.	116,125	7.5	103,483	9.8	219,608	52.9	47.1

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							
January	31,236	23,510	14,108	4,542	12,336	18,959	766	2,980	521	392	109,350
February	37,653	27,054	14,984	4,183	12,529	19,008	841	2,822	699	356	120,129
Jan. - Feb.	68,889	50,564	29,092	8,725	24,865	37,967	1,607	5,802	1,220	748	229,479
+/- %	8.5%	9.1%	-1.0%	7.6%	7.7%	14.7%	-13.8%	3.6%	0.3%	42.5%	7.9%

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	FEBRUARY							JANUARY - FEBRUARY						
	2001	2002	2003	2004	% C h a n g e			2001	2002	2003	2004	% C h a n g e		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
U.S.A.														
<u>NORTHEAST (NEW YORK)</u>														
Connecticut	2,174	1,891	2,204	2,235	1.4	18.2	2.8	3,507	3,146	3,729	4,010	7.5	27.5	14.3
Delaware	420	285	412	439	6.6	54.0	4.5	804	596	789	839	6.3	40.8	4.4
Maine	331	240	310	443	42.9	84.6	33.8	560	444	527	702	33.2	58.1	25.4
Maryland	2,226	2,088	2,692	2,575	-4.3	23.3	15.7	4,602	4,465	5,118	5,309	3.7	18.9	15.4
Massachusetts	3,661	3,030	3,195	3,917	22.6	29.3	7.0	6,390	5,581	5,815	6,677	14.8	19.6	4.5
New Hampshire	686	571	605	775	28.1	35.7	13.0	1,162	953	919	1,204	31.0	26.3	3.6
New Jersey	4,746	4,105	4,828	5,118	6.0	24.7	7.8	8,577	7,818	8,840	9,228	4.4	18.0	7.6
New York	14,641	11,900	13,321	14,730	10.6	23.8	0.6	24,838	21,284	23,858	25,998	9.0	22.1	4.7
Pennsylvania	4,303	4,184	4,801	4,518	-5.9	8.0	5.0	8,502	7,689	9,173	9,446	3.0	22.9	11.1
Rhode Island	356	301	320	404	26.2	34.2	13.5	589	561	642	725	12.9	29.2	23.1
Vermont	283	185	268	335	25.0	81.1	18.4	422	280	368	499	35.6	78.2	18.2
Virginia	1,412	1,365	1,566	1,608	2.7	17.8	13.9	2,896	2,663	2,821	3,205	13.6	20.4	10.7
Washington D.C.	350	338	354	343	-3.1	1.5	-2.0	697	646	700	685	-2.1	6.0	-1.7
West Virginia	162	140	130	213	63.8	52.1	31.5	278	219	204	362	77.5	65.3	30.2
Total	35,751	30,623	35,006	37,653	7.6	23.0	5.3	63,824	56,345	63,503	68,889	8.5	22.3	7.9
<u>MIDWEST (CHICAGO)</u>														
Illinois	5,017	4,536	5,046	5,135	1.8	13.2	2.4	9,991	9,281	10,063	10,136	0.7	9.2	1.5
Indiana	967	1,267	1,257	1,249	-0.6	-1.4	29.2	2,137	2,270	2,358	2,356	-0.1	3.8	10.2
Iowa	924	1,038	1,388	1,469	5.8	41.5	59.0	2,072	2,222	2,488	2,839	14.1	27.8	37.0
Kansas	369	271	381	475	24.7	75.3	28.7	805	551	707	930	31.5	68.8	15.5
Kentucky	520	550	473	513	8.5	-6.7	-1.3	841	850	828	879	6.2	3.4	4.5
Michigan	4,644	3,498	4,223	4,619	9.4	32.0	-0.5	7,108	5,615	6,299	7,225	14.7	28.7	1.6
Minnesota	3,552	3,213	3,697	3,902	5.5	21.4	9.9	6,679	6,048	6,656	7,017	5.4	16.0	5.1
Missouri	1,470	1,410	1,891	2,132	12.7	51.2	45.0	3,083	2,804	3,425	3,900	13.9	39.1	26.5
Nebraska	405	311	488	527	8.0	69.5	30.1	1,116	687	1,056	1,083	2.6	57.6	-3.0
North Dakota	170	157	200	294	47.0	87.3	72.9	359	311	366	623	70.2	100.3	73.5
Ohio	1,771	1,947	1,738	1,717	-1.2	-11.8	-3.0	3,556	3,277	3,130	3,299	5.4	0.7	-7.2
South Dakota	198	181	311	316	1.6	74.6	59.6	395	370	564	669	18.6	80.8	69.4
Wisconsin	4,102	3,736	3,914	4,706	20.2	26.0	14.7	8,720	7,741	8,418	9,608	14.1	24.1	10.2
Total	24,109	22,115	25,007	27,054	8.2	22.3	12.2	46,862	42,027	46,358	50,564	9.1	20.3	7.9

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	FEBRUARY			% Change			JANUARY - FEBRUARY			% Change				
	2001	2002	2003	2004	2004/03	2004/02	2004/01	2001	2002	2003	2004	2004/03	2004/02	2004/01
SOUTH (MIAMI)														
Alabama	559	438	473	359	-24.1	-18.0	-35.8	873	718	831	670	-19.4	-6.7	-23.3
Arkansas	136	127	189	226	19.6	78.0	66.2	283	284	390	443	13.6	56.0	56.5
Florida	7,346	6,698	7,037	7,480	6.3	11.7	1.8	13,761	13,407	13,840	14,446	4.4	7.7	5.0
Georgia	2,403	2,368	2,267	2,411	6.4	1.8	0.3	4,526	4,264	4,921	4,360	-11.4	2.3	-3.7
Louisiana	276	395	355	344	-3.1	-12.9	24.6	571	674	642	606	-5.6	-10.1	6.1
Mississippi	138	148	130	111	-14.6	-25.0	-19.6	242	261	266	221	-16.9	-15.3	-8.7
North Carolina	1,282	1,053	1,265	1,090	-13.8	3.5	-15.0	2,293	2,116	2,533	2,532	-0.0	19.7	10.4
Oklahoma	193	170	190	242	27.4	42.4	25.4	383	360	406	482	18.7	33.9	25.8
South Carolina	515	448	557	566	1.6	26.3	9.9	992	842	1,035	1,045	1.0	24.1	5.3
Tennessee	725	830	801	692	-13.6	-16.6	-4.6	1,261	1,429	1,598	1,396	-12.6	-2.3	10.7
Texas	1,356	1,695	1,575	1,463	-7.1	-13.7	7.9	2,525	3,216	2,933	2,891	-1.4	-10.1	14.5
Total	14,929	14,370	14,839	14,984	1.0	4.3	0.4	27,710	27,571	29,395	29,092	-1.0	5.5	5.0
WEST (LOS ANGELES)														
Alaska	19	27	47	37	-21.3	37.0	94.7	51	57	85	87	2.4	52.6	70.6
Arizona	380	320	254	308	21.3	-3.7	-18.9	844	631	515	637	23.7	1.0	-24.5
California	2,060	2,118	2,197	2,161	-1.6	2.0	4.9	4,640	4,183	4,423	4,571	3.3	9.3	-1.5
Colorado	531	708	441	610	38.3	-13.8	14.9	1,097	1,175	949	1,290	35.9	9.8	17.6
Hawaii	6	10	20	30	50.0	200.0	400.0	23	21	29	51	75.9	142.9	121.7
Idaho	131	101	108	86	-20.4	-14.9	-34.4	332	190	277	183	-33.9	-3.7	-44.9
Montana	53	60	100	107	7.0	78.3	101.9	138	137	177	218	23.2	59.1	58.0
Nevada	79	98	161	146	-9.3	49.0	84.8	219	222	300	286	-4.7	28.8	30.6
New Mexico	76	59	49	55	12.2	-6.8	-27.6	206	105	107	149	39.3	41.9	-27.7
Oregon	144	176	167	165	-1.2	-6.3	14.6	328	321	309	346	12.0	7.8	5.5
Utah	91	94	115	130	13.0	38.3	42.9	188	220	287	231	-19.5	5.0	22.9
Washington	403	344	317	313	-1.3	-9.0	-22.3	706	624	594	586	-1.3	-6.1	-17.0
Wyoming	29	15	26	35	34.6	133.3	20.7	56	47	60	90	50.0	91.5	60.7
Total	4,002	4,130	4,002	4,183	4.5	1.3	4.5	8,828	7,933	8,112	8,725	7.6	10.0	-1.2
TOTAL U.S.A.	78,791	71,238	78,854	83,874	6.4	17.7	6.5	147,224	133,876	147,368	157,270	6.7	17.5	6.8

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	FEBRUARY							JANUARY - FEBRUARY						
	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	636	455	520	887	70.6	94.9	39.5	1,240	923	1,129	1,927	70.7	108.8	55.4
British Columbia	434	269	309	396	28.2	47.2	-8.8	829	623	672	774	15.2	24.2	-6.6
Manitoba	595	321	779	539	-30.8	67.9	-9.4	1,171	612	1,385	1,167	-15.7	90.7	-0.3
New Brunswick	239	107	149	220	47.7	105.6	-7.9	368	226	248	313	26.2	38.5	-14.9
Newfoundland	55	72	111	50	-55.0	-30.6	-9.1	86	125	134	79	-41.0	-36.8	-8.1
Nova Scotia	397	199	282	345	22.3	73.4	-13.1	520	351	392	463	18.1	31.9	-11.0
Ontario	9,251	7,921	7,456	7,793	4.5	-1.6	-15.8	18,865	15,787	15,329	15,651	2.1	-0.9	-17.0
P.E. Island	15	13	22	32	45.5	146.2	113.3	32	30	26	42	61.5	40.0	31.3
Quebec	1,858	1,453	1,533	1,989	29.7	36.9	7.1	4,010	3,124	3,154	3,827	21.3	22.5	-4.6
Saskatchewan	306	155	314	253	-19.4	63.2	-17.3	564	306	569	555	-2.5	81.4	-1.6
Other Canada	54	43	31	25	-19.4	-41.9	-53.7	109	82	57	67	17.5	-18.3	-38.5
Total	13,840	11,008	11,506	12,529	8.9	13.8	-9.5	27,794	22,189	23,095	24,865	7.7	12.1	-10.5
LONDON OFFICE														
Northern Europe														
U.K.	9,712	9,665	10,664	11,850	11.1	22.6	22.0	18,868	17,951	20,189	22,819	13.0	27.1	20.9
Denmark	105	65	43	91	111.6	40.0	-13.3	166	121	87	172	97.7	42.1	3.6
Finland	40	37	94	59	-37.2	59.5	47.5	88	81	168	165	-1.8	103.7	87.5
Norway	66	94	143	75	-47.6	-20.2	13.6	186	151	214	163	-23.8	7.9	-12.4
Sweden	252	173	93	147	58.1	-15.0	-41.7	388	267	196	298	52.0	11.6	-23.2
Southern Europe														
Greece	23	20	74	17	-77.0	-15.0	-26.1	45	39	91	23	-74.7	-41.0	-48.9
Italy	1,545	1,213	2,627	2,425	-7.7	99.9	57.0	3,021	2,394	5,756	5,475	-4.9	128.7	81.2
Portugal	20	15	54	68	25.9	353.3	240.0	33	26	84	80	-4.8	207.7	142.4
Spain	130	77	102	80	-21.6	3.9	-38.5	283	231	199	160	-19.6	-30.7	-43.5
Western Europe														
Austria	261	196	196	336	71.4	71.4	28.7	555	420	473	852	80.1	102.9	53.5
Belgium	80	108	90	180	100.0	66.7	125.0	156	183	184	332	80.4	81.4	112.8
France	327	274	263	340	29.3	24.1	4.0	521	504	509	614	20.6	21.8	17.9
Germany	2,137	1,248	1,449	1,877	29.5	50.4	-12.2	3,955	2,515	3,121	3,953	26.7	57.2	-0.1
Luxemburg	8	3	6	18	200.0	500.0	125.0	17	5	14	29	107.1	480.0	70.6
Netherlands	217	179	325	324	-0.3	81.0	49.3	425	323	556	630	13.3	95.0	48.2
Switzerland	230	143	193	471	144.0	229.4	104.8	530	286	392	1,001	155.4	250.0	88.9
Central/East Europe														
Czechoslovakia	34	52	64	65	1.6	25.0	91.2	86	60	89	109	22.5	81.7	26.7
Hungary	29	30	15	19	26.7	-36.7	-34.5	52	64	44	71	61.4	10.9	36.5
Poland	26	75	79	162	105.1	116.0	523.1	91	113	193	279	44.6	146.9	206.6
Russia	67	43	79	90	13.9	109.3	34.3	229	220	281	272	-3.2	23.6	18.8
Other Europe	111	71	159	314	97.5	342.3	182.9	213	147	258	470	82.2	219.7	120.7
Total	15,420	13,781	16,812	19,008	13.1	37.9	23.3	29,908	26,101	33,098	37,967	14.7	45.5	26.9

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	FEBRUARY			% Change			JANUARY - FEBRUARY			% Change				
	2001	2002	2003	2004	2004/03	2004/02	2004/01	2001	2002	2003	2004	2004/03	2004/02	2004/01
LATIN AMERICA														
CENTRAL AMERICA														
Mexico	182	130	103	111	7.8	-14.6	-39.0	345	224	215	231	7.4	3.1	-33.0
Belize	28	28	95	27	-71.6	-3.6	-3.6	67	63	222	62	-72.1	-1.6	-7.5
Costa Rica	81	61	47	40	-14.9	-34.4	-50.6	123	148	97	83	-14.4	-43.9	-32.5
El Salvador	15	10	8	7	-12.5	-30.0	-53.3	23	40	18	11	-38.9	-72.5	-52.2
Guatemala	30	15	14	23	64.3	53.3	-23.3	55	42	32	52	62.5	23.8	-5.5
Honduras	12	9	11	17	54.5	88.9	41.7	20	25	28	24	-14.3	-4.0	20.0
Nicaragua	4	4	3	5	66.7	25.0	25.0	9	17	6	9	50.0	-47.1	0.0
Panama	132	74	95	123	29.5	66.2	-6.8	225	160	193	212	9.8	32.5	-5.8
Total	484	331	376	353	-6.1	6.6	-27.1	867	719	811	684	-15.7	-4.9	-21.1
SOUTH AMERICA														
Argentina	141	40	47	49	4.3	22.5	-65.2	318	102	116	119	2.6	16.7	-62.6
Bolivia	3	4	8	4	-50.0	0.0	33.3	20	9	14	8	-42.9	-11.1	-60.0
Brazil	80	79	75	68	-9.3	-13.9	-15.0	182	152	135	130	-3.7	-14.5	-28.6
Chile	85	70	60	66	10.0	-5.7	-22.4	162	133	87	115	32.2	-13.5	-29.0
Colombia	83	32	20	22	10.0	-31.3	-73.5	225	108	217	60	-72.4	-44.4	-73.3
Ecuador	16	12	0	18	-	50.0	12.5	28	31	6	27	350.0	-12.9	-3.6
Guyana	114	76	104	120	15.4	57.9	5.3	242	186	258	247	-4.3	32.8	2.1
Paraguay	0	3	2	6	200.0	100.0	-	6	4	5	6	20.0	50.0	0.0
Peru	19	18	20	31	55.0	72.2	63.2	38	40	50	40	-20.0	0.0	5.3
Surinam	27	13	16	22	37.5	69.2	-18.5	61	15	41	45	9.8	200.0	-26.2
Uruguay	2	6	6	25	316.7	316.7	1150.0	5	16	8	27	237.5	68.8	440.0
Venezuela	98	51	42	57	35.7	11.8	-41.8	182	145	115	99	-13.9	-31.7	-45.6
Other South America	0	0	1	0	-100.0	-	-	0	0	1	0	-	-	-
Total	668	404	401	488	21.7	20.8	-26.9	1,469	941	1,053	923	-12.3	-1.9	-37.2
Total Latin America	1,152	735	777	841	8.2	14.4	-27.0	2,336	1,660	1,864	1,607	-13.8	-3.2	-31.2

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	FEBRUARY							JANUARY - FEBRUARY						
	2001	2002	2003	2004	% Change			2001	2002	2003	2004	% Change		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
CARIBBEAN														
Antigua	90	85	79	162	105.1	90.6	80.0	173	175	189	265	40.2	51.4	53.2
Bahamas	382	226	163	166	1.8	-26.5	-56.5	770	457	359	352	-1.9	-23.0	-54.3
Barbados	304	327	274	305	11.3	-6.7	0.3	583	649	627	605	-3.5	-6.8	3.8
Bermuda	102	114	135	133	-1.5	16.7	30.4	208	213	283	254	-10.2	19.2	22.1
British Virgin Is.	28	23	21	34	61.9	47.8	21.4	63	39	62	79	27.4	102.6	25.4
Cayman Is.	863	646	807	836	3.6	29.4	-3.1	1,550	1,198	1,570	1,777	13.2	48.3	14.6
Dominica	39	10	23	15	-34.8	50.0	-61.5	67	25	46	32	-30.4	28.0	-52.2
Grenada	25	32	41	30	-26.8	-6.3	20.0	70	78	82	74	-9.8	-5.1	5.7
Monsterrat	6	2	6	11	83.3	450.0	83.3	17	8	13	15	15.4	87.5	-11.8
St. Kitts/Nevis/Anguilla	43	28	35	55	57.1	96.4	27.9	75	66	96	106	10.4	60.6	41.3
St. Lucia	83	55	119	90	-24.4	63.6	8.4	165	157	259	211	-18.5	34.4	27.9
St. Vincent	44	38	34	44	29.4	15.8	0.0	70	91	71	88	23.9	-3.3	25.7
Turks & Caicos Is.	66	48	73	63	-13.7	31.3	-4.5	108	74	122	157	28.7	112.2	45.4
Trinidad & Tobago	589	380	455	462	1.5	21.6	-21.6	1,009	805	974	947	-2.8	17.6	-6.1
Comm. Caribbean	2,664	2,014	2,265	2,406	6.2	19.5	-9.7	4,928	4,035	4,753	4,962	4.4	23.0	0.7
Aruba	17	14	31	17	-45.2	21.4	0.0	35	32	62	34	-45.2	6.3	-2.9
Bonaire	0	0	0	1	-	-	-	0	0	0	1	-	-	-
Cuba	47	62	43	39	-9.3	-37.1	-17.0	103	95	120	97	-19.2	2.1	-5.8
Curacao	35	40	64	65	1.6	62.5	85.7	65	83	146	121	-17.1	45.8	86.2
Dominican Republic	48	59	52	78	50.0	32.2	62.5	127	104	97	150	54.6	44.2	18.1
Guadelope	7	1	2	8	300.0	700.0	14.3	8	16	5	8	60.0	-50.0	0.0
Haiti	30	39	77	27	-64.9	-30.8	-10.0	64	81	124	69	-44.4	-14.8	7.8
Puerto Rico	97	148	101	105	4.0	-29.1	8.2	232	267	183	213	16.4	-20.2	-8.2
St. Maarten	16	23	30	45	50.0	95.7	181.3	43	45	51	80	56.9	77.8	86.0
All other Caribbean	32	28	30	31	3.3	10.7	-3.1	54	54	57	67	17.5	24.1	24.1
Other Caribbean	329	414	430	416	-3.3	0.5	26.4	731	777	845	840	-0.6	8.1	14.9
TOTAL CARIBBEAN	2,993	2,428	2,695	2,822	4.7	16.2	-5.7	5,659	4,812	5,598	5,802	3.6	20.6	2.5
OTHER COUNTRIES														
African Countries	61	53	39	82	110.3	54.7	34.4	156	121	107	172	60.7	42.1	10.3
Isreal	81	74	70	86	22.9	16.2	6.2	183	132	116	181	56.0	37.1	-1.1
Saudi Arabia	1	1	3	1	-66.7	0.0	0.0	10	1	3	2	-33.3	100.0	-80.0
Turkey	15	18	14	14	0.0	-22.2	-6.7	39	30	30	34	13.3	13.3	-12.8
Other Middle East	19	13	11	18	63.6	38.5	-5.3	53	27	24	43	79.2	59.3	-18.9
India & Pakistan	46	34	27	41	51.9	20.6	-10.9	98	65	51	75	47.1	15.4	-23.5
Japan	643	386	368	542	47.3	40.4	-15.7	1,138	630	686	886	29.2	40.6	-22.1
China	32	21	34	35	2.9	66.7	9.4	65	49	125	59	-52.8	20.4	-9.2
Taiwan	4	0	11	1	-90.9	-	-75.0	16	7	17	4	-76.5	-42.9	-75.0
Korea	18	15	23	23	0.0	53.3	27.8	46	25	43	55	27.9	120.0	19.6
Philippines	40	44	101	70	-30.7	59.1	75.0	82	72	252	121	-52.0	68.1	47.6
Singapore	14	1	5	16	220.0	1500.0	14.3	30	3	15	22	46.7	633.3	-26.7
Other Asia	35	9	12	12	0.0	33.3	-65.7	62	19	27	39	44.4	105.3	-37.1
Australia	117	109	85	107	25.9	-1.8	-8.5	275	232	219	233	6.4	0.4	-15.3
New Zealand	19	39	10	6	-40.0	-84.6	-68.4	39	52	23	35	52.2	-32.7	-10.3
All Other Ctries	4	3	1	1	0.0	-66.7	-75.0	8	4	3	7	133.3	75.0	-12.5
Total	1,149	820	814	1,055	29.6	28.7	-8.2	2,300	1,469	1,741	1,968	13.0	34.0	-14.4
GRAND TOTAL	113,345	100,010	111,458	120,129	7.8	20.1	6.0	215,221	190,107	212,764	229,479	7.9	20.7	6.6

STOPOVER VISITORS BY MARKET SHARE

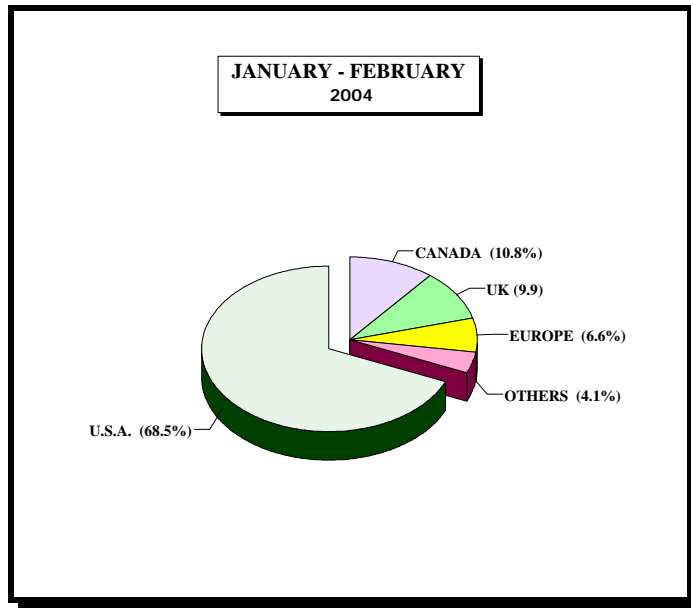


Fig. 2

Country	February 2004	% Share	Jan. - Feb. 2004	% Share	Jan. - Feb. 2003	% Share	%Change 2004/03
U.S.A	83,874	69.8%	157,270	68.5%	147,551	69.3%	6.6%
CANADA	12,529	10.4%	24,865	10.8%	23,095	10.9%	7.7%
U.K.	11,850	9.9%	22,819	9.9%	20,189	9.5%	13.0%
EUROPE	7,158	6.0%	15,148	6.6%	12,909	6.1%	17.3%
OTHERS	4,718	3.9%	9,377	4.1%	9,020	4.2%	4.0%
Total	120,129	100.0%	229,479	100.0%	212,764	100.0%	7.9%

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
Jan. - Feb.	9.4	9.8		6.5	6.7

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

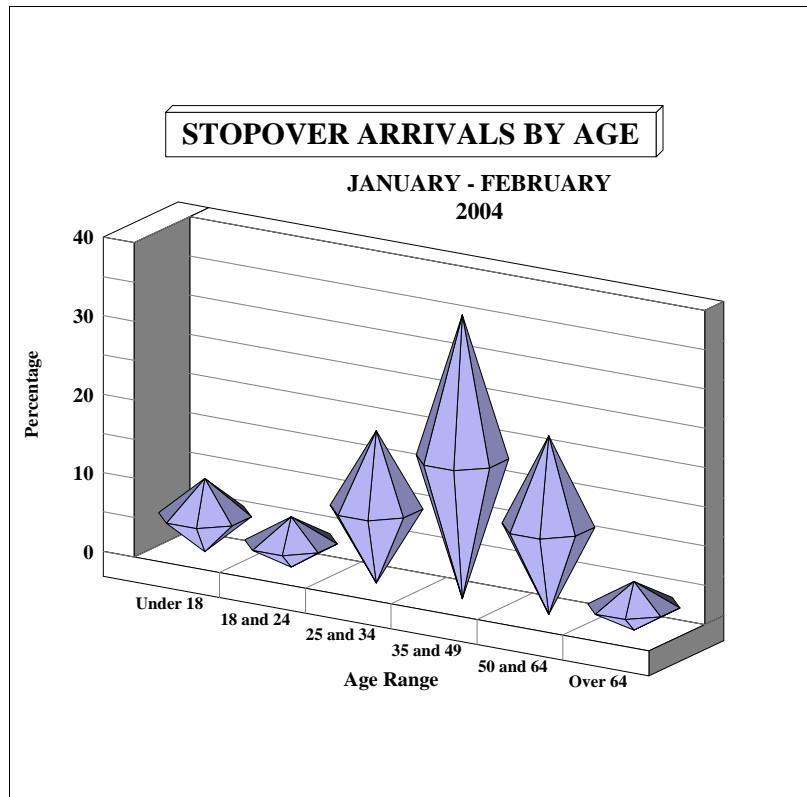


Fig. 3

AGE DISTRIBUTION OF STOPOVER ARRIVALS

Age	FEBRUARY		JAN. - FEB.		JAN. - FEB.		%Change 2004/03
	2004	% Share	2004	% Share	2003	% Share	
Under 18	12,575	10.5	21,325	9.3	18,682	8.8	14.1%
18 and 24	7,250	6.0	14,676	6.4	13,097	6.2	12.1%
25 and 34	22,014	18.3	44,436	19.4	42,786	20.1	3.9%
35 and 49	44,267	36.8	82,916	36.1	78,114	36.7	6.1%
50 and 64	27,063	22.5	52,048	22.7	47,488	22.3	9.6%
Over 64	6,960	5.8	14,078	6.1	12,597	5.9	11.8%
Total	120,129	100.0	229,479	100.0	212,764	100.0	7.9%

TABLE 4**CRUISE PASSENGER ARRIVALS BY MONTH AND PORT OF CALL
JANUARY - FEBRUARY 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%
Jan. - Feb.	46	71,926	-6.1%	-13.2%	73	166,515	4.3%	9.3%	123	240,001	120	235,285	2.5%	2.0%

- * 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 Antonio.
 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 Antonio.

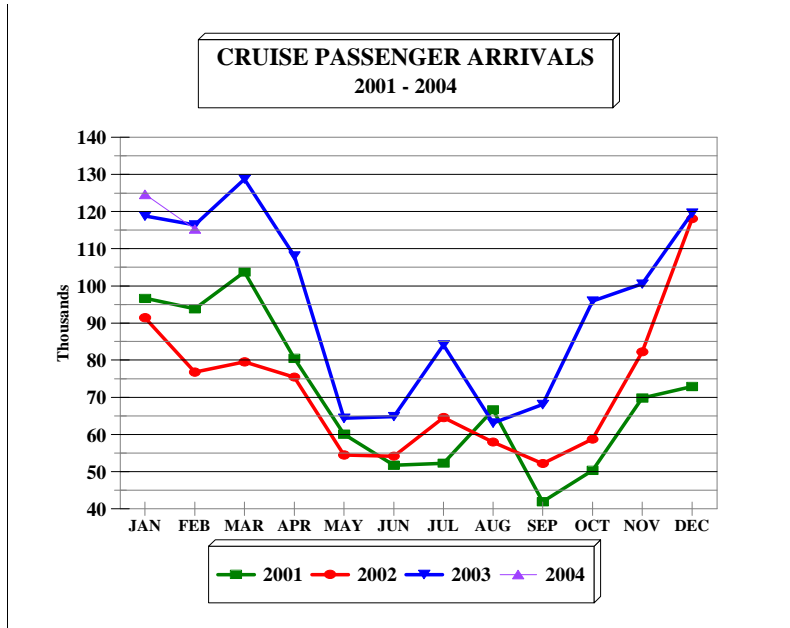


FIG. 4

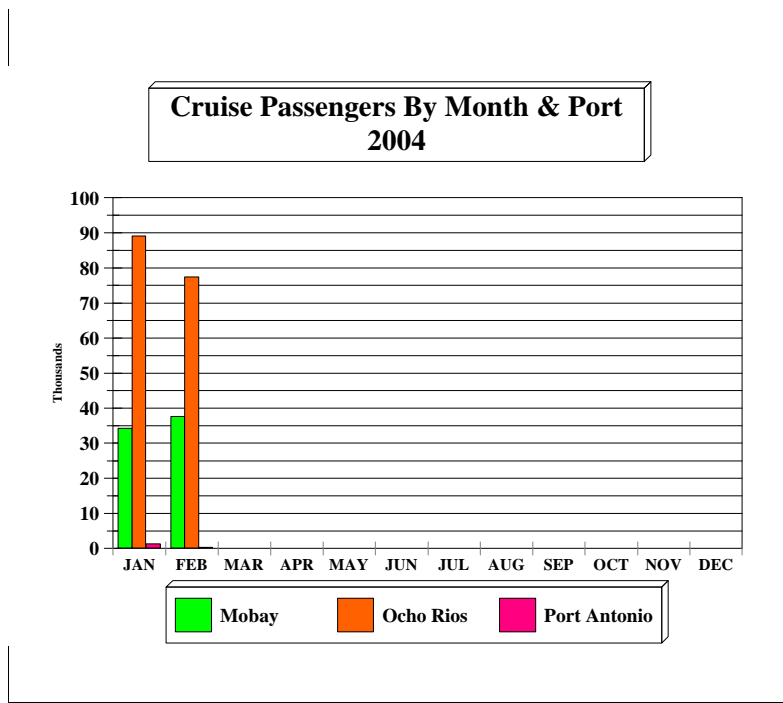


FIG. 4a

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	FEBRUARY 2004			JANUARY - FEBRUARY 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
U.S.A.						
<u>NORTHEAST (NEW YORK)</u>						
Connecticut	2,226	9	2,235	3,997	13	4,010
Delaware	439	0	439	839	0	839
Maine	435	8	443	693	9	702
Maryland	2,557	18	2,575	5,286	23	5,309
Massachusetts	3,887	30	3,917	6,644	33	6,677
New Hampshire	769	6	775	1,198	6	1,204
New Jersey	5,080	38	5,118	9,184	44	9,228
New York	14,509	221	14,730	25,724	274	25,998
Pennsylvania	4,441	77	4,518	9,344	102	9,446
Rhode Island	400	4	404	721	4	725
Vermont	334	1	335	496	3	499
Virginia	1,601	7	1,608	3,196	9	3,205
Washington D.C.	340	3	343	681	3	684
West Virginia	208	5	213	356	7	363
Total	<u>37,226</u>	<u>427</u>	<u>37,653</u>	<u>68,359</u>	<u>530</u>	<u>68,889</u>
<u>MIDWEST (CHICAGO)</u>						
Illinois	2,488	2,647	5,135	4,978	5,158	10,136
Indiana	980	269	1,249	1,841	515	2,356
Iowa	862	607	1,469	1,743	1,096	2,839
Kansas	434	41	475	836	94	930
Kentucky	484	29	513	843	36	879
Michigan	2,999	1,620	4,619	5,024	2,201	7,225
Minnesota	2,394	1,508	3,902	4,015	3,002	7,017
Missouri	719	1,413	2,132	1,307	2,593	3,900
Nebraska	507	20	527	1,036	47	1,083
North Dakota	185	109	294	412	211	623
Ohio	1,541	176	1,717	3,000	299	3,299
South Dakota	263	53	316	577	92	669
Wisconsin	2,501	2,205	4,706	5,400	4,208	9,608
Total	<u>16,357</u>	<u>10,697</u>	<u>27,054</u>	<u>31,012</u>	<u>19,552</u>	<u>50,564</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

FEBRUARY 2004

JANUARY - FEBRUARY 2004

	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>SOUTH (MIAMI)</u>						
Alabama	357	2	359	666	4	670
Arkansas	218	8	226	419	24	443
Florida	7,449	31	7,480	14,400	46	14,446
Georgia	2,411	0	2,411	4,359	1	4,360
Louisiana	340	4	344	601	5	606
Mississippi	110	1	111	219	2	221
North Carolina	1,086	4	1,090	2,523	9	2,532
Oklahoma	229	13	242	462	20	482
South Carolina	564	2	566	1,042	3	1,045
Tennessee	680	12	692	1,381	15	1,396
Texas	1,455	8	1,463	2,871	20	2,891
Total	<u>14,899</u>	<u>85</u>	<u>14,984</u>	<u>28,943</u>	<u>149</u>	<u>29,092</u>
<u>WEST (LOS ANGELES)</u>						
Alaska	35	2	37	81	6	87
Arizona	289	19	308	608	29	637
California	2,134	27	2,161	4,524	47	4,571
Colorado	439	171	610	821	469	1,290
Hawaii	30	0	30	50	1	51
Idaho	86	0	86	183	0	183
Montana	100	7	107	208	10	218
Nevada	140	6	146	275	11	286
New Mexico	54	1	55	144	5	149
Oregon	164	1	165	341	5	346
Utah	130	0	130	230	1	231
Washington	290	23	313	554	32	586
Wyoming	33	2	35	67	23	90
Total	<u>3,924</u>	<u>259</u>	<u>4,183</u>	<u>8,086</u>	<u>639</u>	<u>8,725</u>
TOTAL U.S.A.	<u>72,406</u>	<u>11,468</u>	<u>83,874</u>	<u>136,400</u>	<u>20,870</u>	<u>157,270</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	FEBRUARY 2004			JANUARY - FEBRUARY 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CANADA (TORONTO)</u>						
Alberta	873	14	887	1,899	28	1,927
British Columbia	393	3	396	761	13	774
Manitoba	527	12	539	1,135	32	1,167
New Brunswick	210	10	220	293	20	313
Newfoundland	48	2	50	73	6	79
Nova Scotia	336	9	345	440	23	463
Ontario	4,916	2,877	7,793	9,739	5,912	15,651
P.E. Island	32	0	32	42	0	42
Quebec	1,266	723	1,989	2,550	1,277	3,827
Saskatchewan	248	5	253	547	8	555
Other Canada	22	3	25	54	13	67
Total	8,871	3,658	12,529	17,533	7,332	24,865
<u>LONDON OFFICE</u>						
<u>Northern Europe</u>						
U.K.	7,426	4,424	11,850	13,907	8,912	22,819
Denmark	91	0	91	170	2	172
Finland	58	1	59	161	4	165
Norway	73	2	75	160	3	163
Sweden	143	4	147	292	6	298
<u>Southern Europe</u>						
Greece	10	7	17	15	8	23
Italy	785	1,640	2,425	1,770	3,705	5,475
Portugal	67	1	68	77	3	80
Spain	70	10	80	141	19	160
<u>Western Europe</u>						
Austria	257	79	336	415	437	852
Belgium	175	5	180	324	8	332
France	323	17	340	580	34	614
Germany	1,858	19	1,877	3,890	63	3,953
Luxemburg	18	0	18	29	0	29
Netherlands	321	3	324	626	4	630
Switzerland	179	292	471	330	671	1,001
<u>Central/East Europe</u>						
Czechoslovakia	56	9	65	99	10	109
Hungary	19	0	19	65	6	71
Poland	161	1	162	276	3	279
Russia	87	3	90	260	12	272
Other Europe	130	184	314	274	196	470
Total	12,307	6,701	19,008	23,861	14,106	37,967

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	FEBRUARY 2004			JANUARY - FEBRUARY 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>OTHER COUNTRIES</u>						
<u>CENTRAL AMERICA</u>						
Mexico	111	0	111	231	0	231
Belize	27	0	27	62	0	62
Costa Rica	40	0	40	83	0	83
El Salvador	7	0	7	11	0	11
Guatemala	23	0	23	52	0	52
Honduras	17	0	17	24	0	24
Nicaragua	5	0	5	9	0	9
Panama	123	0	123	212	0	212
Total	353	0	353	684	0	684
<u>SOUTH AMERICA</u>						
Argentina	49	0	49	118	1	119
Bolivia	4	0	4	8	0	8
Brazil	68	0	68	127	3	130
Chile	66	0	66	114	1	115
Colombia	22	0	22	60	0	60
Ecuador	17	1	18	26	1	27
Guyana	120	0	120	247	0	247
Paraguay	6	0	6	6	0	6
Peru	30	1	31	39	1	40
Surinam	21	1	22	44	1	45
Uruguay	25	0	25	27	0	27
Venezuela	57	0	57	99	0	99
Other South America	0	0	0	0	0	0
Total	485	3	488	915	8	923
Total Latin America	838	3	841	1,599	8	1,607

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

FEBRUARY 2004

JANUARY - FEBRUARY 2004

	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CARIBBEAN</u>						
Antigua	162	0	162	264	1	265
Bahamas	166	0	166	352	0	352
Barbados	305	0	305	605	0	605
Bermuda	132	1	133	253	1	254
British Virgin Is.	34	0	34	79	0	79
Cayman Is.	836	0	836	1,777	0	1,777
Dominica	15	0	15	32	0	32
Grenada	30	0	30	74	0	74
Monsterrat	11	0	11	15	0	15
St. Kitts/Nevis/Anguilla	55	0	55	106	0	106
St. Lucia	90	0	90	211	0	211
St. Vincent	44	0	44	88	0	88
Turks & Caicos Is.	63	0	63	157	0	157
Trinidad & Tobago	462	0	462	946	1	947
Comm. Caribbean	2,405	1	2,406	4,959	3	4,962
Aruba	17	0	17	34	0	34
Bonaire	1	0	1	1	0	1
Cuba	35	4	39	93	4	97
Curacao	65	0	65	121	0	121
Dominican Republic	75	3	78	147	3	150
Guadelope	8	0	8	8	0	8
Haiti	27	0	27	69	0	69
Puerto Rico	103	2	105	210	3	213
St. Maarten	45	0	45	80	0	80
All other Caribbean	31	0	31	67	0	67
Other Caribbean	407	9	416	830	10	840
TOTAL CARIBBEAN	2,812	10	2,822	5,789	13	5,802
<u>OTHER COUNTRIES</u>						
African Countries	77	5	82	163	9	172
Isreal	84	2	86	179	2	181
Saudi Arabia	1	0	1	2	0	2
Turkey	13	1	14	31	3	34
Other Middle East	14	4	18	33	10	43
India & Pakistan	41	0	41	75	0	75
Japan	541	1	542	883	3	886
China	35	0	35	59	0	59
Taiwan	1	0	1	4	0	4
Korea	23	0	23	53	2	55
Philippines	70	0	70	121	0	121
Singapore	15	1	16	21	1	22
Other Asia	12	0	12	38	1	39
Australia	107	0	107	232	1	233
New Zealand	6	0	6	34	1	35
All Other Ctries	1	0	1	7	0	7
Total	1,041	14	1,055	1,935	33	1,968
GRAND TOTAL	98,275	21,854	120,129	187,117	42,362	229,479

Stopover Arrivals

By Intended Resort Area of Stay

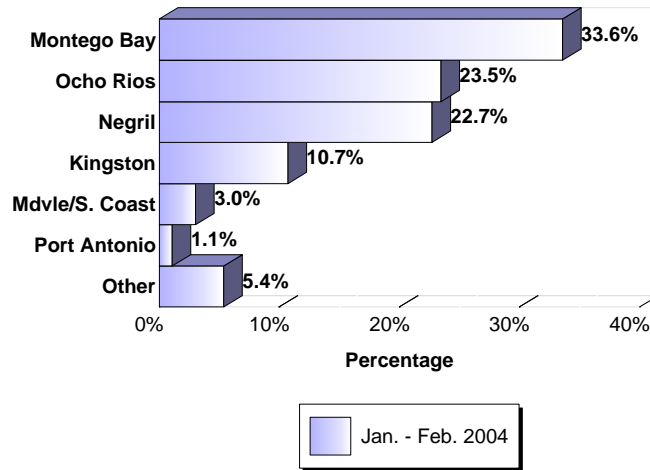


Fig. 5

STOPOVER ARRIVALS BY INTENDED AREA OF STAY

Area	FEBRUARY		JAN.- FEB.		JAN.- FEB.		%Change 2004/03
	2004	%Share	2004	%Share	2003	%Share	
Montego Bay	40,369	33.6%	75,500	32.9%	71,053	33.4%	6.3%
Ocho Rios	28,200	23.5%	53,703	23.4%	46,920	22.1%	14.5%
Negril	27,277	22.7%	52,482	22.9%	47,900	22.5%	9.6%
Kingston	12,891	10.7%	25,280	11.0%	25,770	12.1%	-1.9%
Mdvle/S. Coast	3,659	3.0%	7,479	3.3%	6,708	3.2%	11.5%
Port Antonio	1,291	1.1%	2,310	1.0%	2,041	1.0%	13.2%
Other	6,442	5.4%	12,725	5.5%	12,372	5.8%	2.9%
Total	120,129	100.0%	229,479	100.0%	212,764	100.0%	7.9%