

JAMAICA TOURIST BOARD

IN JUNE 2004.....

- Stopover arrivals were up by 9%
- US Market increased by 7%
- Canada increased by 21%
- Europe increased by 18%
- Cruise Passenger arrivals up by 18%.

TOURIST (Stopovers)

Stopover arrivals in June 2004 were **133,393**, an increase of **9.3%** over the **122,071** recorded for June 2003. Cumulatively, stopovers for the January to June period increased by **9.4%** with **742,338** compared to **678,315** in 2003.

United States

Stopover arrivals from the United States market increased by **7%** in June with a total of **101,168** visitors compared to the **94,554** visitors who came in June 2003. All US Market regions recorded increases. The Northeast was up **12%**, the Midwest by less than **1%**, the South up **4%** and the West up **13%**.

For the January to June period the US market increased by **8%**. Total visitors from this market was **535,000** compared to **493,355** for the corresponding period in 2003. The Northeast increased by **13%**, the Midwest by **6%**, the South by **3%** and the West increased by **12%**.

Canada

During June, the Canadian market increased by **21%** with a total of **5,957** stopovers compared to **4,917** in June 2003. The leading province, Ontario increased by **22%**, and the second most important visitor-producing province, Quebec increased by **25%**. For the other provinces, Alberta and Manitoba grew by **21%** and **10%** respectively, while British Columbia declined by **4%**.

Cumulatively, the Canadian market increased by **13%** in the January to June period, with a total of **58,539** stopovers compared to **52,004** in 2003. The main provinces

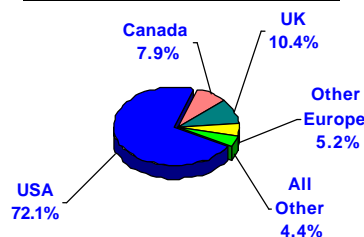
Ontario and Quebec recorded increases of **10%** and **12%** respectively. The other notable increases were Alberta up **69%**, Nova Scotia up **23%**, British Columbia up **21%** and New Brunswick up **23%**.

Europe

The European market grew by **18%** in June 2004. The market provided a total of **20,102** stopover visitors compared to the **17,017** recorded in June 2003. The main contributors to this growth came from the United Kingdom with **14,215** visitors up by **10%**, Spain with **1,894** up by **129%** and Italy with **1,257** up by **72%**. The other countries which showed notable increases were: Belgium (**68%**), and France (**47%**).

Cumulatively, for the January to June period, the European market increased by **15%**. Total stopovers for the period was **115,839** compared to **101,008** in 2003. The United Kingdom with a total of **77,463** stopovers increased by **14%**, Italy with **11,754** declined by approximately **6%** and Germany with a total of **9,670** increased by **20%**.

STOPOVER ARRIVALS BY MARKET SHARE
January - June 2004



Latin America

The Latin American market declined by **10%** in June with a total of **782** stopovers compared to **871** in June 2003. The Central American region declined by **20%**, with **334** stopovers compared to **418** in June 2003. The South American Countries combined declined by **1%** with **448** stopovers compared to **453** in June 2003.

For the January to June period, the Latin American market declined by **5%** with a total of **5,352** visitors compared to **5,636** for the corresponding period in 2003.

The Caribbean

Visitors to Jamaica from the Caribbean region increased by **19%** in June with a total of **4,510** visitors, compared to **3,784** in June 2003.

The major Caribbean countries which provided visitors to Jamaica in June were: the Cayman Islands (**1,177**) up **37%** and Trinidad & Tobago (**773**) up **10%**. Barbados with **587** increased by **18%** and the Bahamas with **279**, declined by **2%**.

Cumulatively, during the January to June period, Caribbean stopover arrivals to Jamaica increased by **7%**, moving from **20,449** in 2003 to **21,879** 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 **6,445** visitors, followed by Trinidad and Tobago with **3,529**, Barbados with **2,650** and the Bahamas with **1,374** visitors.

Japan

The Japanese market increased by **24%** in June with a total of **334** stopovers compared to **269** in June 2003.

Cumulatively for the January to June period, a total of **2,079** Japanese visitors came to Jamaica which was up by approximately **29%** from the **1,607** recorded for the corresponding period in 2003.

Other Countries

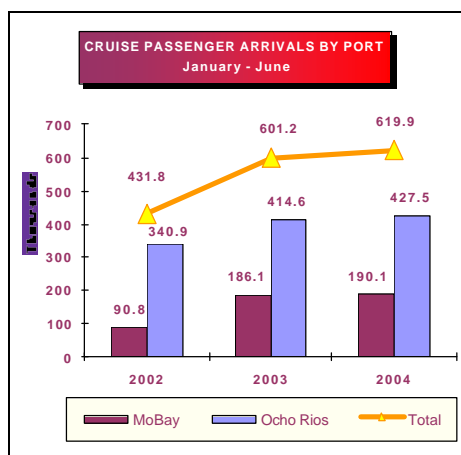
All the other countries, with a total of **3,316** stopovers in the January to June period recorded a decline of **17%** against the **3,987** who came for the same period in 2003.

Market Share

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

USA **72.1%**; Canada **7.9%**; UK **10.4%**; Continental Europe **5.2%**; the Caribbean **2.9%**; Latin America **0.7%**; and Other Countries **0.8%**.

Cruise Passengers



A total of **76,427** cruise passengers visited Jamaica in June 2004. This represents an increase of **17.9%** against the **64,812** recorded for June 2003. Cumulatively, a total of **619,862** cruise passengers visited Jamaica in the January to June period, a **3.1%** increase against the **601,214** recorded for the corresponding period in 2003.

A total of **51,928** cruise passengers visited the port of Ocho Rios in June, an increase of **3%** over the **50,403** recorded for June 2003. For the January to June period cruise passenger arrivals to the port of Ocho Rios was **427,505**, an increase of **3%** against the **414,583** recorded for the corresponding period in 2003.

Montego Bay recorded a total of **24,499** cruise passengers for the month which was up **72%** against the **14,214** recorded for 2003. Cumulatively, for the January to June period, cruise passenger arrivals to Montego Bay was **190,082**, an increase of **2%** against the **186,113** recorded for the same period in 2003.

Length of Stay

The average length of stay of stopovers in June was **10.2** nights against **10.5** for June 2003. The average length of stay in hotels was **6.3** nights compared to **6.2** nights in June 2003.

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

First and Repeat Visitors

Approximately **57%** or **71,284** of the **125,153** Foreign Nationals who visited Jamaica in June were first-time visitors and the other **43%** or **53,869** were repeat guests.

Cumulatively, in the January to June period, some **56%** of the **705,080** Foreign Nationals who visited the island were first-time guests and **44%** were repeat guests.

TABLE 1**TOURIST ARRIVALS**

January - June

2004

Month	Foreign Nationals	<----- Stopovers ----->					Total Stopover Arrivals	+/- 2004/03	+/- 2004/02
		+/- 2004/03	+/- 2004/02	Non-Resident Jamaicans	+/- 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%
May	105,842	10.5%	14.3%	5,917	-4.7%	-11.5%	111,759	9.5%	12.5%
June	125,153	9.7%	18.0%	8,240	3.1%	7.5%	133,393	9.3%	17.3%
May-Jun.	230,995	10.1%	16.3%	14,157	-0.3%	-1.4%	245,152	9.4%	15.1%
Jan.-Jun.	705,080	10.0%	18.1%	37,258	-0.3%	0.6%	742,338	9.4%	17.1%

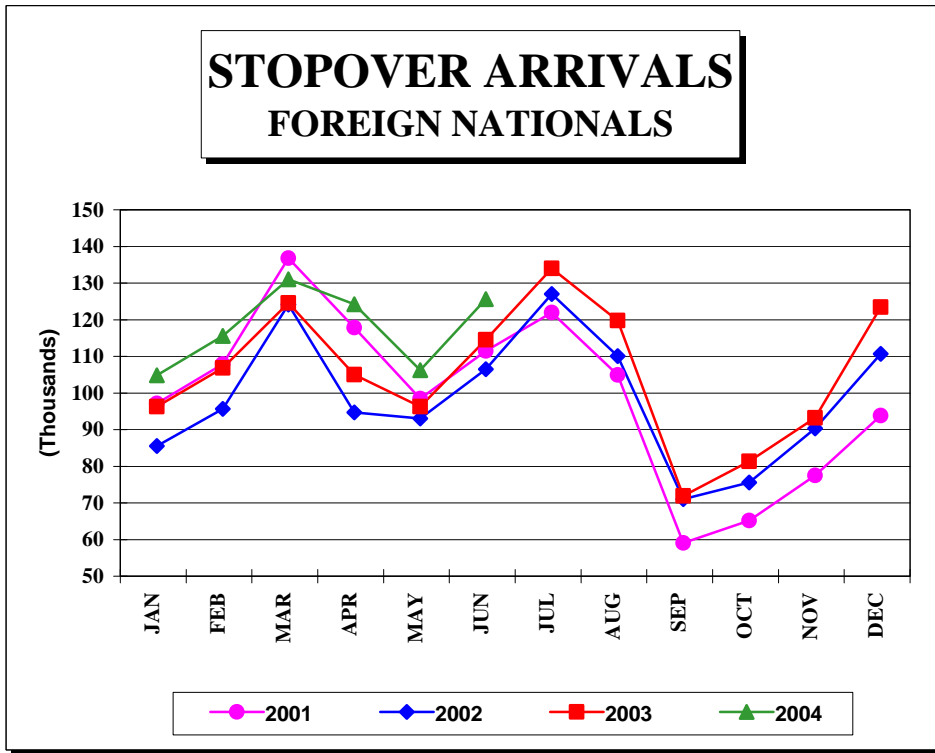


FIG. 1

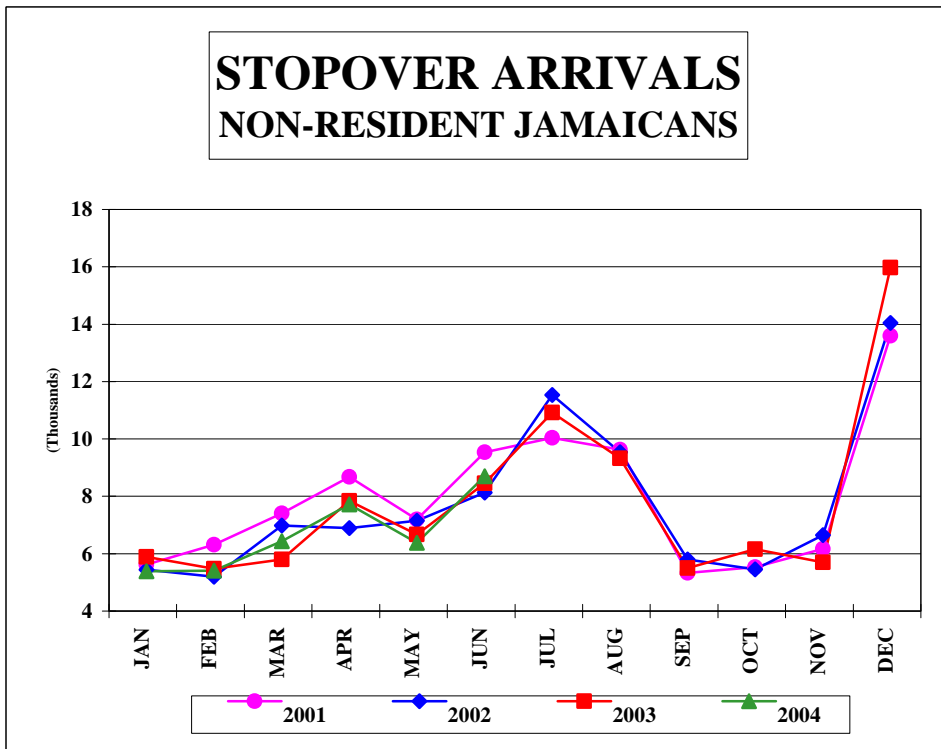


FIG. 1a

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
May	61,937	13.8	43,905	6.0	105,842	58.5	41.5
Jun.	71,284	9.4	53,869	10.1	125,153	57.0	43.0
May-Jun.	133,221	11.4	97,774	8.2	230,995	57.7	42.3
Jan.-Jun.	394,445	9.9	310,635	10.2	705,080	55.9	44.1

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
March	42,908	29,393	20,789	5,495	11,239	21,009	1,209	3,585	686	293	136,606
April	47,843	20,524	22,329	6,670	9,619	17,658	773	4,749	611	325	131,101
Jan.-Apr.	159,640	100,481	72,210	20,890	45,723	76,634	3,589	14,136	2,517	1,366	497,186
May	33,313	14,271	26,608	6,419	6,859	19,103	981	3,233	570	402	111,759
June	39,235	16,851	36,446	8,636	5,957	20,102	782	4,510	502	372	133,393
May - Dec.	72,548	31,122	63,054	15,055	12,816	39,205	1,763	7,743	1,072	774	245,152
Jan. - Jun.	232,188	131,603	135,264	35,945	58,539	115,839	5,352	21,879	3,589	2,140	742,338
+/- %	12.5%	6.2%	3.3%	12.1%	12.6%	14.7%	-5.0%	7.0%	6.4%	-14.0%	9.4%

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>JUNE</u>			% C h a n g e			<u>JANUARY - JUNE</u>			% C h a n g e				
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	2004/03	2004/02	2004/01	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	2004/03	2004/02	2004/01
U.S.A.														
<u>NORTHEAST (NEW YORK)</u>														
Connecticut	1,965	1,802	1,929	2,186	13.3	21.3	11.2	13,094	11,376	12,002	13,827	15.2	21.5	5.6
Delaware	589	500	332	539	62.3	7.8	-8.5	3,188	2,452	2,510	2,983	18.8	21.7	-6.4
Maine	125	109	162	244	50.6	123.9	95.2	1,841	1,504	1,504	2,238	48.8	48.8	21.6
Maryland	3,719	3,538	3,770	4,346	15.3	22.8	16.9	18,135	16,694	17,713	20,107	13.5	20.4	10.9
Massachusetts	2,140	1,774	2,107	2,382	13.1	34.3	11.3	20,175	16,186	16,600	20,120	21.2	24.3	-0.3
New Hampshire	268	173	253	267	5.5	54.3	-0.4	3,391	2,548	2,614	3,252	24.4	27.6	-4.1
New Jersey	5,351	4,378	5,048	5,547	9.9	26.7	3.7	31,333	27,179	30,235	33,511	10.8	23.3	7.0
New York	13,146	12,309	13,215	14,267	8.0	15.9	8.5	85,310	74,054	77,407	84,775	9.5	14.5	-0.6
Pennsylvania	5,301	5,193	5,187	5,931	14.3	14.2	11.9	29,231	26,962	28,801	31,740	10.2	17.7	8.6
Rhode Island	213	228	223	354	58.7	55.3	66.2	1,979	1,727	1,939	2,448	26.3	41.7	23.7
Vermont	85	72	76	89	17.1	23.6	4.7	1,278	854	974	1,341	37.7	57.0	4.9
Virginia	2,056	1,981	2,003	2,234	11.5	12.8	8.7	11,457	10,307	10,746	11,934	11.1	15.8	4.2
Washington D.C.	517	449	524	584	11.5	30.1	13.0	2,831	2,423	2,568	2,621	2.1	8.2	-7.4
West Virginia	296	152	162	265	63.6	74.3	-10.5	1,214	855	860	1,291	50.1	51.0	6.3
Total	35,771	32,658	34,991	39,235	12.1	20.1	9.7	224,457	195,121	206,473	232,188	12.5	19.0	3.4
<u>MIDWEST (CHICAGO)</u>														
Illinois	4,536	4,447	4,319	4,490	4.0	1.0	-1.0	30,389	27,616	29,256	30,023	2.6	8.7	-1.2
Indiana	1,203	1,035	1,497	1,337	-10.7	29.2	11.1	7,453	6,964	7,976	7,846	-1.6	12.7	5.3
Iowa	346	425	502	580	15.5	36.5	67.6	4,483	4,401	4,887	5,431	11.1	23.4	21.1
Kansas	520	524	545	608	11.6	16.0	16.9	2,968	2,251	2,336	3,019	29.2	34.1	1.7
Kentucky	523	678	806	785	-2.6	15.8	50.1	3,001	3,158	3,253	3,301	1.5	4.5	10.0
Michigan	1,591	1,475	2,091	1,862	-11.0	26.2	17.0	19,269	15,039	18,052	18,461	2.3	22.8	-4.2
Minnesota	610	672	753	785	4.2	16.8	28.7	13,763	12,196	14,105	14,492	2.7	18.8	5.3
Missouri	1,846	2,379	2,489	2,250	-9.6	-5.4	21.9	10,212	9,723	11,266	12,308	9.2	26.6	20.5
Nebraska	348	353	429	479	11.7	35.7	37.6	2,693	2,144	2,462	2,778	12.8	29.6	3.2
North Dakota	36	102	63	162	157.1	58.8	350.0	706	711	762	1,257	65.0	76.8	78.0
Ohio	1,791	1,756	2,160	2,187	1.2	24.5	22.1	11,599	11,337	10,843	11,449	5.6	1.0	-1.3
South Dakota	47	88	83	120	44.6	36.4	155.3	804	729	1,147	1,241	8.2	70.2	54.4
Wisconsin	1,244	1,131	1,073	1,206	12.4	6.6	-3.1	19,030	16,571	17,560	19,997	13.9	20.7	5.1
Total	14,641	15,065	16,810	16,851	0.2	11.9	15.1	126,370	112,840	123,905	131,603	6.2	16.6	4.1

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>JUNE</u>			<u>2004</u>	<u>% C h a n g e</u>			<u>JANUARY - JUNE</u>			<u>2004</u>	<u>% C h a n g e</u>		
	<u>2001</u>	<u>2002</u>	<u>2003</u>		<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>		<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>
<u>SOUTH (MIAMI)</u>														
Alabama	945	1,043	1,033	955	-7.6	-8.4	1.1	3,871	3,625	4,034	3,952	-2.0	9.0	2.1
Arkansas	471	361	456	460	0.9	27.4	-2.3	1,421	1,342	1,598	1,750	9.5	30.4	23.2
Florida	14,222	13,125	14,005	14,928	6.6	13.7	5.0	60,602	57,165	57,787	60,587	4.8	6.0	-0.0
Georgia	5,635	6,153	5,509	5,932	7.7	-3.6	5.3	21,956	22,738	21,770	22,064	1.4	-3.0	0.5
Louisiana	1,339	1,280	1,347	940	-30.2	-26.6	-29.8	3,528	3,496	3,509	3,017	-14.0	-13.7	-14.5
Mississippi	530	553	394	457	16.0	-17.4	-13.8	1,661	1,719	1,519	1,792	18.0	4.2	7.9
North Carolina	2,521	2,247	2,325	2,522	8.5	12.2	0.0	9,911	8,964	9,505	10,377	9.2	15.8	4.7
Oklahoma	717	783	779	838	7.6	7.0	16.9	2,158	2,044	2,142	2,440	13.9	19.4	13.1
South Carolina	1,069	979	1,131	1,179	4.2	20.4	10.3	4,467	4,009	4,357	4,404	1.1	9.9	-1.4
Tennessee	1,399	1,644	1,584	1,622	2.4	-1.3	15.9	5,943	6,420	6,638	6,712	1.1	4.5	12.9
Texas	6,685	6,777	6,544	6,613	1.1	-2.4	-1.1	16,689	19,126	18,044	18,169	0.7	-5.0	8.9
Total	35,533	34,945	35,107	36,446	3.8	4.3	2.6	132,207	130,648	130,903	135,264	3.3	3.5	2.3
<u>WEST (LOS ANGELES)</u>														
Alaska	25	7	28	26	-7.1	271.4	4.0	196	132	185	204	10.3	54.5	4.1
Arizona	994	599	596	720	20.8	20.2	-27.6	4,062	2,452	2,342	2,682	14.5	9.4	-34.0
California	4,956	4,791	4,899	5,513	12.5	15.1	11.2	20,773	18,854	18,506	21,213	14.6	12.5	2.1
Colorado	717	766	754	913	21.1	19.2	27.3	4,164	4,060	3,587	4,511	25.8	11.1	8.3
Hawaii	38	21	20	31	55.0	47.6	-18.4	134	89	119	152	27.7	70.8	13.4
Idaho	93	88	86	116	34.9	31.8	24.7	742	553	638	519	-18.7	-6.1	-30.1
Montana	32	51	54	79	46.3	54.9	146.9	401	395	530	530	0.0	34.2	32.2
Nevada	222	212	282	333	18.1	57.1	50.0	1,005	944	1,237	1,274	3.0	35.0	26.8
New Mexico	133	100	122	143	17.2	43.0	7.5	698	519	482	590	22.4	13.7	-15.5
Oregon	218	169	190	185	-2.6	9.5	-15.1	1,321	1,180	1,160	1,159	-0.1	-1.8	-12.3
Utah	117	121	174	175	0.6	44.6	49.6	585	665	882	778	-11.8	17.0	33.0
Washington	362	355	398	368	-7.5	3.7	1.7	2,418	2,092	2,172	2,069	-4.7	-1.1	-14.4
Wyoming	24	40	43	34	-20.9	-15.0	41.7	228	214	234	264	12.8	23.4	15.8
Total	7,931	7,320	7,646	8,636	12.9	18.0	8.9	36,727	32,149	32,074	35,945	12.1	11.8	-2.1
TOTAL U.S.A.	93,876	89,988	94,554	101,168	7.0	12.4	7.8	519,761	470,758	493,355	535,000	8.4	13.6	2.9

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	<u>JUNE</u>			% C h a n g e			<u>JANUARY - JUNE</u>			% C h a n g e				
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	2004/03	2004/02	2004/01	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	2004/03	2004/02	2004/01
<u>CANADA (TORONTO)</u>														
Alberta	242	148	164	198	20.7	33.8	-18.2	2,715	2,112	2,262	3,813	68.6	80.5	40.4
British Columbia	177	143	161	154	-4.3	7.7	-13.0	1,854	1,470	1,530	1,851	21.0	25.9	-0.2
Manitoba	78	70	39	43	10.3	-38.6	-44.9	2,026	1,055	2,032	1,754	-13.7	66.3	-13.4
New Brunswick	39	13	13	24	84.6	84.6	-38.5	991	666	636	783	23.1	17.6	-21.0
Newfoundland	35	44	30	52	73.3	18.2	48.6	347	351	340	363	6.8	3.4	4.6
Nova Scotia	68	37	54	43	-20.4	16.2	-36.8	1,680	821	1,122	1,384	23.4	68.6	-17.6
Ontario	5,185	4,350	4,102	5,018	22.3	15.4	-3.2	46,502	39,439	36,844	40,560	10.1	2.8	-12.8
P.E. Island	1	3	1	0	-100.0	-100.0	-100.0	102	97	120	143	19.2	47.4	40.2
Quebec	485	442	304	376	23.7	-14.9	-22.5	8,629	6,752	6,165	6,932	12.4	2.7	-19.7
Saskatchewan	32	19	32	28	-12.5	47.4	-12.5	857	480	836	823	-1.6	71.5	-4.0
Other Canada	21	11	17	21	23.5	90.9	0.0	240	171	117	133	13.7	-22.2	-44.6
Total	6,363	5,280	4,917	5,957	21.2	12.8	-6.4	65,943	53,414	52,004	58,539	12.6	9.6	-11.2
<u>LONDON OFFICE</u>														
<u>Northern Europe</u>														
U.K.	10,395	9,978	12,894	14,215	10.2	42.5	36.7	59,675	56,117	67,931	77,463	14.0	38.0	29.8
Denmark	47	42	42	46	9.5	9.5	-2.1	416	284	218	334	53.2	17.6	-19.7
Finland	19	10	11	17	54.5	70.0	-10.5	203	224	281	243	-13.5	8.5	19.7
Norway	70	58	107	81	-24.3	39.7	15.7	449	506	481	388	-19.3	-23.3	-13.6
Sweden	70	49	96	97	1.0	98.0	38.6	751	598	546	628	15.0	5.0	-16.4
<u>Southern Europe</u>														
Greece	12	19	12	31	158.3	63.2	158.3	105	112	135	102	-24.4	-8.9	-2.9
Italy	570	480	730	1,257	72.2	161.9	120.5	6,638	5,622	12,443	11,754	-5.5	109.1	77.1
Portugal	33	101	47	151	221.3	49.5	357.6	145	505	242	460	90.1	-8.9	217.2
Spain	610	767	829	1,894	128.5	146.9	210.5	1,327	2,385	2,493	3,703	48.5	55.3	179.1
<u>Western Europe</u>														
Austria	88	98	136	94	-30.9	-4.1	6.8	1,215	873	1,037	1,535	48.0	75.8	26.3
Belgium	82	100	321	539	67.9	439.0	557.3	562	603	1,002	1,935	93.1	220.9	244.3
France	153	114	151	222	47.0	94.7	45.1	1,458	1,392	1,353	1,523	12.6	9.4	4.5
Germany	1,075	833	883	848	-4.0	1.8	-21.1	10,994	6,770	8,048	9,670	20.2	42.8	-12.0
Luxemburg	2	6	5	18	260.0	200.0	800.0	46	30	36	70	94.4	133.3	52.2
Netherlands	265	150	412	292	-29.1	94.7	10.2	1,342	961	1,732	1,715	-1.0	78.5	27.8
Switzerland	115	128	163	140	-14.1	9.4	21.7	1,285	889	1,112	2,153	93.6	142.2	67.5
<u>Central/East Europe</u>														
Czechoslovakia	22	11	10	27	170.0	145.5	22.7	179	135	187	245	31.0	81.5	36.9
Hungary	2	4	19	20	5.3	400.0	900.0	90	113	94	115	22.3	1.8	27.8
Poland	15	17	34	30	-11.8	76.5	100.0	209	307	374	448	19.8	45.9	114.4
Russia	55	29	49	27	-44.9	-6.9	-50.9	537	592	688	574	-16.6	-3.0	6.9
Other Europe	74	57	66	56	-15.2	-1.8	-24.3	474	498	575	781	35.8	56.8	64.8
Total	13,774	13,051	17,017	20,102	18.1	54.0	45.9	88,100	79,516	101,008	115,839	14.7	45.7	31.5

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>JUNE</u>							<u>JANUARY - JUNE</u>						
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>% C h a n g e</u>			<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>% C h a n g e</u>		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
<u>LATIN AMERICA</u>														
<u>CENTRAL AMERICA</u>														
Mexico	184	159	161	129	-19.9	-18.9	-29.9	1,261	909	912	1,025	12.4	12.8	-18.7
Belize	37	54	72	50	-30.6	-7.4	35.1	218	248	626	253	-59.6	2.0	16.1
Costa Rica	53	61	42	38	-9.5	-37.7	-28.3	319	352	259	318	22.8	-9.7	-0.3
El Salvador	60	14	6	9	50.0	-35.7	-85.0	113	104	64	115	79.7	10.6	1.8
Guatemala	28	30	23	24	4.3	-20.0	-14.3	163	204	158	249	57.6	22.1	52.8
Honduras	2	12	17	17	0.0	41.7	750.0	94	81	84	152	81.0	87.7	61.7
Nicaragua	5	10	8	3	-62.5	-70.0	-40.0	23	47	22	37	68.2	-21.3	60.9
Panama	138	95	89	64	-28.1	-32.6	-53.6	704	513	519	507	-2.3	-1.2	-28.0
Total	507	435	418	334	-20.1	-23.2	-34.1	2,895	2,458	2,644	2,656	0.5	8.1	-8.3
<u>SOUTH AMERICA</u>														
Argentina	79	33	25	44	76.0	33.3	-44.3	786	252	359	275	-23.4	9.1	-65.0
Bolivia	3	3	6	6	0.0	100.0	100.0	32	26	33	26	-21.2	0.0	-18.8
Brazil	63	73	58	74	27.6	1.4	17.5	499	458	375	464	23.7	1.3	-7.0
Chile	59	54	42	30	-28.6	-44.4	-49.2	370	378	215	256	19.1	-32.3	-30.8
Colombia	187	237	23	24	4.3	-89.9	-87.2	1,000	483	446	154	-65.5	-68.1	-84.6
Ecuador	24	18	16	6	-62.5	-66.7	-75.0	147	104	39	49	25.6	-52.9	-66.7
Guyana	141	188	174	164	-5.7	-12.8	16.3	783	759	840	812	-3.3	7.0	3.7
Paraguay	4	3	4	2	-	-33.3	-50.0	11	12	11	11	0.0	-8.3	0.0
Peru	44	42	26	12	-53.8	-71.4	-72.7	185	206	172	147	-14.5	-28.6	-20.5
Surinam	12	18	16	26	62.5	44.4	116.7	151	92	137	117	-14.6	27.2	-22.5
Uruguay	13	8	3	6	100.0	-25.0	-53.8	61	40	29	53	82.8	32.5	-13.1
Venezuela	86	83	60	54	-10.0	-34.9	-37.2	728	700	332	331	-0.3	-52.7	-54.5
Other South America	2	1	0	0	-	-	-	4	9	4	1	-	-	-
Total	717	761	453	448	-1.1	-41.1	-37.5	4,757	3,519	2,992	2,696	-9.9	-23.4	-43.3
Total Latin America	1,224	1,196	871	782	-10.2	-34.6	-36.1	7,652	5,977	5,636	5,352	-5.0	-10.5	-30.1

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>JUNE</u>							<u>JANUARY - JUNE</u>						
	2001	2002	2003	2004	% Change			2001	2002	2003	2004	% Change		
					2004/03	2004/02	2004/01					2004/03	2004/02	2004/01
<u>CARIBBEAN</u>														
Antigua	139	178	161	157	-2.5	-11.8	12.9	665	710	738	842	14.1	18.6	26.6
Bahamas	611	322	285	279	-2.1	-13.4	-54.3	3,070	1,810	1,340	1,374	2.5	-24.1	-55.2
Barbados	386	372	498	587	17.9	57.8	52.1	1,987	2,163	2,447	2,650	8.3	22.5	33.4
Bermuda	75	101	143	176	23.1	74.3	134.7	696	830	1,045	959	-8.2	15.5	37.8
British Virgin Is.	42	46	74	63	-14.9	37.0	50.0	202	182	232	373	60.8	104.9	84.7
Cayman Is.	1,115	900	858	1,177	37.2	30.8	5.6	5,872	5,068	5,593	6,445	15.2	27.2	9.8
Dominica	29	32	45	41	-8.9	28.1	41.4	187	135	176	142	-19.3	5.2	-24.1
Grenada	34	40	66	54	-18.2	35.0	58.8	252	245	295	270	-8.5	10.2	7.1
Monsterrat	6	5	13	5	-61.5	0.0	-16.7	49	27	54	53	-1.9	96.3	8.2
St. Kitts/Nevis/Anguilla	63	54	78	59	-24.4	9.3	-6.3	298	279	345	442	28.1	58.4	48.3
St. Lucia	131	119	186	169	-9.1	42.0	29.0	641	632	831	810	-2.5	28.2	26.4
St. Vincent	45	49	74	77	4.1	57.1	71.1	231	262	256	277	8.2	5.7	19.9
Turks & Caicos Is.	53	75	52	60	15.4	-20.0	13.2	412	401	420	463	10.2	15.5	12.4
Trinidad & Tobago	500	497	705	773	9.6	55.5	54.6	3,291	3,221	3,522	3,529	0.2	9.6	7.2
Comm. Caribbean	3,229	2,790	3,238	3,677	13.6	31.8	13.9	17,853	15,965	17,294	18,629	7.7	16.7	4.3
Aruba	20	19	33	90	172.7	373.7	350.0	106	134	226	209	-7.5	56.0	97.2
Bonaire	0	0	0	5	ERR	-	-	0	0	16	25	56.3	-	-
Cuba	41	54	63	20	-68.3	-63.0	-51.2	325	310	316	199	-37.0	-35.8	-38.8
Curacao	46	66	78	90	15.4	36.4	95.7	212	444	663	460	-30.6	3.6	117.0
Dominican Republic	128	86	90	141	56.7	64.0	10.2	463	481	397	544	37.0	13.1	17.5
Guadelope	3	1	16	14	-12.5	1300.0	366.7	31	39	49	93	89.8	138.5	200.0
Haiti	35	52	64	91	42.2	75.0	160.0	237	314	380	237	-37.6	-24.5	0.0
Puerto Rico	157	137	108	244	125.9	78.1	55.4	802	865	605	843	39.3	-2.5	5.1
St. Maarten	45	78	58	63	8.6	-19.2	40.0	227	224	269	271	0.7	21.0	19.4
All other Caribbean	33	64	36	75	108.3	17.2	127.3	230	258	234	369	57.7	43.0	60.4
Other Caribbean	508	557	546	833	52.6	49.6	64.0	2,633	3,069	3,155	3,250	3.0	5.9	23.4
TOTAL CARIBBEAN	3,737	3,347	3,784	4,510	19.2	34.7	20.7	20,486	19,034	20,449	21,879	7.0	14.9	6.8
<u>OTHER COUNTRIES</u>														
African Countries	100	86	123	106	-13.8	23.3	6.0	678	461	482	525	8.9	13.9	-22.6
Isreal	94	50	67	54	-19.4	8.0	-42.6	494	330	364	426	17.0	29.1	-13.8
Saudi Arabia	4	3	4	0	-100.0	-	-100.0	18	8	14	13	-7.1	62.5	-27.8
Turkey	8	8	8	3	-62.5	-62.5	-62.5	106	64	69	92	33.3	43.8	-13.2
Other Middle East	20	33	34	51	50.0	54.5	155.0	163	134	132	151	14.4	12.7	-7.4
India & Pakistan	79	47	63	37	-41.3	-21.3	-53.2	438	289	281	305	8.5	5.5	-30.4
Japan	539	368	269	334	24.2	-9.2	-38.0	3,317	2,282	1,876	2,413	28.6	5.7	-27.3
China	48	26	37	51	37.8	96.2	6.3	261	241	268	255	-4.9	5.8	-2.3
Taiwan	6	8	7	11	57.1	37.5	83.3	38	36	44	26	-40.9	-27.8	-31.6
Korea	23	15	18	7	-61.1	-53.3	-69.6	142	126	96	116	20.8	-7.9	-18.3
Philippines	44	33	88	19	-78.4	-42.4	-56.8	271	319	663	276	-58.4	-13.5	1.8
Singapore	8	11	13	6	-53.8	-45.5	-25.0	70	44	57	54	-5.3	22.7	-22.9
Other Asia	32	22	27	37	37.0	68.2	15.6	197	112	129	185	43.4	65.2	-6.1
Australia	107	91	149	142	-4.7	56.0	32.7	739	657	1,269	730	-42.5	11.1	-1.2
New Zealand	20	37	21	10	-52.4	-73.0	-50.0	135	174	116	142	22.4	-18.4	5.2
All Other Ctries	6	5	0	6	-	20.0	0.0	33	39	3	20	566.7	-48.7	-39.4
Total	1,138	843	928	874	-5.8	3.7	-23.2	7,100	5,316	5,863	5,729	-2.3	7.8	-19.3
GRAND TOTAL	120,112	113,705	122,071	133,393	9.3	17.3	11.1	709,042	634,015	678,315	742,338	9.4	17.1	4.7

STOPOVER VISITORS BY MARKET SHARE

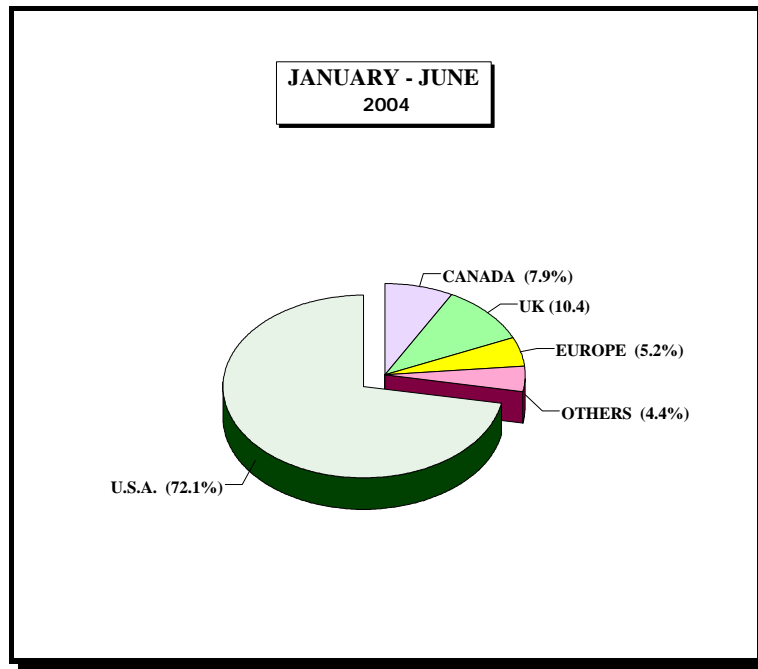


Fig. 2

Country	June 2004	% Share	Jan. - Jun. 2004	% Share	Jan. - Jun. 2003	% Share	%Change 2004/03
U.S.A	101,168	75.8%	535,000	72.1%	493,960	72.8%	8.3%
CANADA	5,957	4.5%	58,539	7.9%	52,004	7.7%	12.6%
U.K.	14,215	10.7%	77,463	10.4%	67,931	10.0%	14.0%
EUROPE	5,887	4.4%	38,376	5.2%	33,077	4.9%	16.0%
OTHERS	6,166	4.6%	32,960	4.4%	31,343	4.6%	5.2%
Total	133,393	100.0%	742,338	100.0%	678,315	100.0%	9.4%

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
May	9.2	8.7		5.9	6.3
June	10.5	10.2		6.2	6.3
Jan. - June	9.1	9.1		6.2	6.3

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

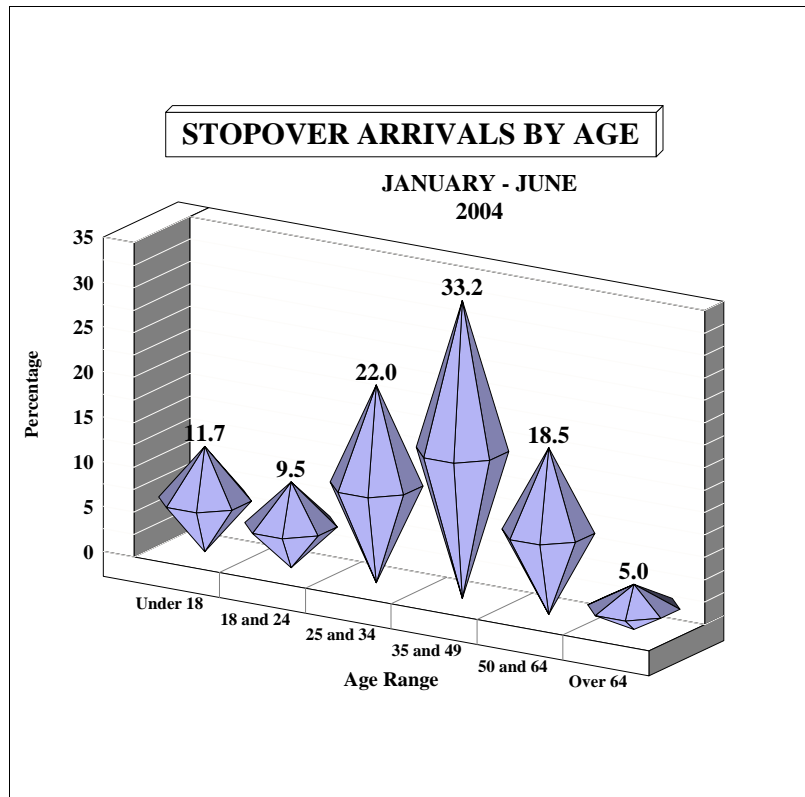


Fig. 3

AGE DISTRIBUTION OF STOPOVER ARRIVALS

Age	JUNE		JAN. - JUN.		JAN. - JUN.		%Change 2004/03
	2004	% Share	2004	% Share	2003	% Share	
Under 18	21,270	15.9	86,923	11.7	75,831	11.2	14.6%
18 and 24	14,600	10.9	70,287	9.5	65,127	9.6	7.9%
25 and 34	32,262	24.2	163,653	22.0	155,202	22.9	5.4%
35 and 49	39,279	29.4	246,801	33.2	226,387	33.4	9.0%
50 and 64	20,126	15.1	137,370	18.5	123,467	18.2	11.3%
Over 64	5,856	4.4	37,304	5.0	32,301	4.8	15.5%
Total	133,393	100.0	742,338	100.0	678,315	100.0	9.4%

TABLE 4**CRUISE PASSENGER ARRIVALS BY MONTH AND PORT OF CALL
JANUARY - JUNE 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%
May	5	16,052	-28.6%	-5.1%	18	48,372	0.0%	2.0%	23	64,424	25	64,350	-8.0%	0.1%
June	8	24,499	33.3%	72.4%	18	51,928	5.9%	3.0%	26	76,427	24	64,812	8.3%	17.9%
May - Jun.	13	40,551	0.0%	30.3%	36	100,300	2.9%	2.5%	49	140,851	49	129,162	0.0%	9.0%
Jan. - Jun.	99	190,082	-8.3%	2.1%	172	427,505	-2.3%	3.1%	276	619,862	287	601,214	-3.8%	3.1%

- * 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.
 5. Included in the total Cruise passengers for the month of March, 1 call with 715 passengers visited Port Antonio.
 6. During the month of April 1 Cruise Ship call with 1,181 Cruise passengers visited two ports.

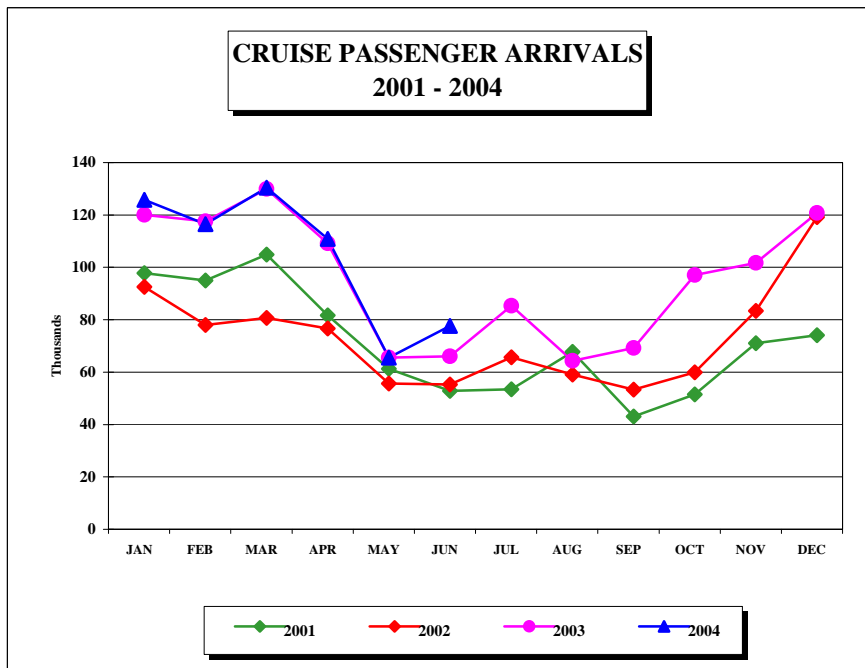


FIG. 4

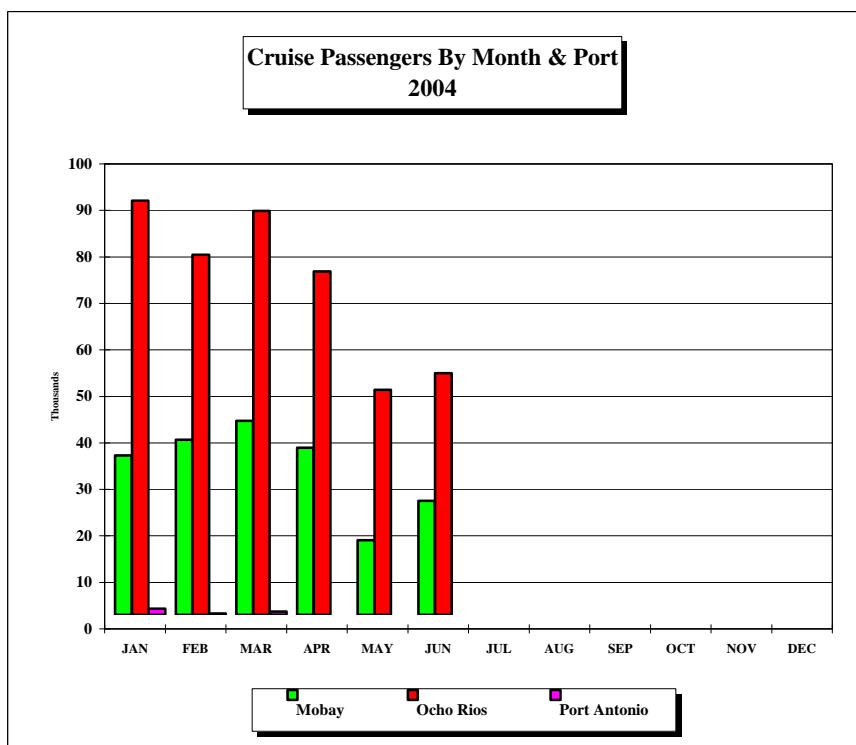


FIG. 4a

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	JUNE 2004			JANUARY - JUNE 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
U.S.A.						
<u>NORTHEAST (NEW YORK)</u>						
Connecticut	2,182	4	2,186	13,639	188	13,827
Delaware	539	0	539	2,965	18	2,983
Maine	244	0	244	2,215	23	2,238
Maryland	4,343	3	4,346	19,786	321	20,107
Massachusetts	2,378	4	2,382	19,688	432	20,120
New Hampshire	267	0	267	3,180	72	3,252
New Jersey	5,547	0	5,547	33,182	329	33,511
New York	14,230	37	14,267	83,353	1,422	84,775
Pennsylvania	5,931	0	5,931	31,088	652	31,740
Rhode Island	354	0	354	2,423	25	2,448
Vermont	89	0	89	1,320	21	1,341
Virginia	2,233	1	2,234	11,653	281	11,934
Washington D.C.	584	0	584	2,576	44	2,620
West Virginia	265	0	265	1,224	68	1,292
Total	39,186	49	39,235	228,292	3,896	232,188
<u>MIDWEST (CHICAGO)</u>						
Illinois	3,111	1,379	4,490	17,641	12,382	30,023
Indiana	1,158	179	1,337	6,340	1,506	7,846
Iowa	512	68	580	3,752	1,679	5,431
Kansas	587	21	608	2,676	343	3,019
Kentucky	769	16	785	3,104	197	3,301
Michigan	1,457	405	1,862	13,454	5,007	18,461
Minnesota	776	9	785	9,181	5,311	14,492
Missouri	998	1,252	2,250	4,413	7,895	12,308
Nebraska	471	8	479	2,692	86	2,778
North Dakota	162	0	162	963	294	1,257
Ohio	2,125	62	2,187	10,361	1,088	11,449
South Dakota	120	0	120	1,090	151	1,241
Wisconsin	825	381	1,206	11,215	8,782	19,997
Total	13,071	3,780	16,851	86,882	44,721	131,603

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	JUNE 2004			JANUARY - JUNE 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>SOUTH (MIAMI)</u>						
Alabama	954	1	955	3,938	14	3,952
Arkansas	417	43	460	1,650	100	1,750
Florida	14,916	12	14,928	60,443	144	60,587
Georgia	5,922	10	5,932	22,009	55	22,064
Louisiana	882	58	940	2,943	74	3,017
Mississippi	455	2	457	1,771	21	1,792
North Carolina	2,518	4	2,522	10,196	181	10,377
Oklahoma	346	492	838	1,732	708	2,440
South Carolina	1,174	5	1,179	4,361	43	4,404
Tennessee	1,614	8	1,622	6,625	87	6,712
Texas	4,121	2,492	6,613	15,190	2,979	18,169
Total	33,319	3,127	36,446	130,858	4,406	135,264
<u>WEST (LOS ANGELES)</u>						
Alaska	26	0	26	189	12	201
Arizona	716	4	720	2,624	61	2,685
California	5,494	19	5,513	21,042	171	21,213
Colorado	670	243	913	3,120	1,391	4,511
Hawaii	31	0	31	148	4	152
Idaho	115	1	116	517	2	519
Montana	79	0	79	518	12	530
Nevada	327	6	333	1,248	26	1,274
New Mexico	139	4	143	571	19	590
Oregon	183	2	185	1,142	17	1,159
Utah	175	0	175	765	13	778
Washington	366	2	368	2,011	59	2,070
Wyoming	23	11	34	211	52	263
Total	8,344	292	8,636	34,106	1,839	35,945
TOTAL U.S.A.	93,920	7,248	101,168	480,138	54,862	535,000

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	JUNE 2004			JANUARY - JUNE 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CANADA (TORONTO)</u>						
Alberta	188	10	198	3,746	67	3,813
British Columbia	151	3	154	1,806	45	1,851
Manitoba	41	2	43	1,706	48	1,754
New Brunswick	24	0	24	754	29	783
Newfoundland	48	4	52	327	36	363
Nova Scotia	37	6	43	1,346	38	1,384
Ontario	3,937	1,081	5,018	27,002	13,558	40,560
P.E. Island	0	0	0	143	0	143
Quebec	351	25	376	4,919	2,013	6,932
Saskatchewan	26	2	28	807	14	821
Other Canada	16	5	21	113	22	135
Total	4,819	1,138	5,957	42,669	15,870	58,539
<u>LONDON OFFICE</u>						
<u>Northern Europe</u>						
U.K.	8,547	5,668	14,215	48,437	29,026	77,463
Denmark	43	3	46	325	9	334
Finland	16	1	17	236	7	243
Norway	78	3	81	376	12	388
Sweden	95	2	97	610	18	628
<u>Southern Europe</u>						
Greece	29	2	31	91	11	102
Italy	677	580	1,257	4,188	7,566	11,754
Portugal	11	140	151	158	302	460
Spain	111	1,783	1,894	585	3,118	3,703
<u>Western Europe</u>						
Austria	94	0	94	1,017	518	1,535
Belgium	87	452	539	813	1,122	1,935
France	183	39	222	1,375	148	1,523
Germany	841	7	848	9,559	111	9,670
Luxemburg	6	12	18	56	14	70
Netherlands	268	24	292	1,642	73	1,715
Switzerland	127	13	140	904	1,249	2,153
<u>Central/East Europe</u>						
Czechoslovakia	27	0	27	234	11	245
Hungary	20	0	20	108	7	115
Poland	30	0	30	442	6	448
Russia	27	0	27	560	14	574
Other Europe	53	3	56	573	208	781
Total	11,370	8,732	20,102	72,289	43,550	115,839

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	JUNE 2004			JANUARY - JUNE 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>OTHER COUNTRIES</u>						
<u>CENTRAL AMERICA</u>						
Mexico	128	1	129	822	203	1,025
Belize	50	0	50	253	0	253
Costa Rica	38	0	38	285	33	318
El Salvador	9	0	9	53	62	115
Guatemala	24	0	24	160	89	249
Honduras	17	0	17	115	37	152
Nicaragua	3	0	3	26	11	37
Panama	64	0	64	507	0	507
Total	333	1	334	2,221	435	2,656
<u>SOUTH AMERICA</u>						
Argentina	44	0	44	274	1	275
Bolivia	6	0	6	26	0	26
Brazil	74	0	74	460	4	464
Chile	30	0	30	254	2	256
Colombia	24	0	24	154	0	154
Ecuador	6	0	6	48	1	49
Guyana	164	0	164	811	1	812
Paraguay	2	0	2	11	0	11
Peru	12	0	12	146	1	147
Surinam	26	0	26	116	1	117
Uruguay	6	0	6	53	0	53
Venezuela	54	0	54	329	2	331
Other South America	0	0	0	1	0	1
Total	448	0	448	2,683	13	2,696
Total Latin America	781	1	782	4,904	448	5,352

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	JUNE 2004			JANUARY - JUNE 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CARIBBEAN</u>						
Antigua	157	0	157	841	1	842
Bahamas	279	0	279	1,370	4	1,374
Barbados	587	0	587	2,649	1	2,650
Bermuda	176	0	176	957	2	959
British Virgin Is.	63	0	63	373	0	373
Cayman Is.	1,174	3	1,177	6,442	3	6,445
Dominica	41	0	41	142	0	142
Grenada	54	0	54	269	1	270
Monsterrat	5	0	5	53	0	53
St. Kitts/Nevis/Anguilla	59	0	59	442	0	442
St. Lucia	169	0	169	810	0	810
St. Vincent	77	0	77	276	1	277
Turks & Caicos Is.	60	0	60	463	0	463
Trinidad & Tobago	773	0	773	3,526	3	3,529
Comm. Caribbean	3,674	3	3,677	18,613	16	18,629
Aruba	90	0	90	209	0	209
Bonaire	5	0	5	25	0	25
Cuba	20	0	20	195	4	199
Curacao	90	0	90	460	0	460
Dominican Republic	141	0	141	540	4	544
Guadelope	14	0	14	93	0	93
Haiti	91	0	91	237	0	237
Puerto Rico	244	0	244	840	3	843
St. Maarten	63	0	63	271	0	271
All other Caribbean	75	0	75	369	0	369
Other Caribbean	833	0	833	3,239	11	3,250
TOTAL CARIBBEAN	4,507	3	4,510	21,852	27	21,879
<u>OTHER COUNTRIES</u>						
African Countries	104	2	106	508	17	525
Isreal	53	1	54	423	3	426
Saudi Arabia	0	0	0	13	0	13
Turkey	3	0	3	83	6	89
Other Middle East	51	0	51	139	15	154
India & Pakistan	36	1	37	297	8	305
Japan	333	1	334	2,408	5	2,413
China	51	0	51	251	4	255
Taiwan	11	0	11	26	0	26
Korea	7	0	7	114	2	116
Philippines	19	0	19	276	0	276
Singapore	6	0	6	53	1	54
Other Asia	37	0	37	183	2	185
Australia	141	1	142	723	7	730
New Zealand	10	0	10	139	3	142
All Other Ctries	6	0	6	20	0	20
Total	868	6	874	5,656	73	5,729
GRAND TOTAL	116,265	17,128	133,393	627,508	114,830	742,338

Stopover Arrivals
By Intended Resort Area of Stay

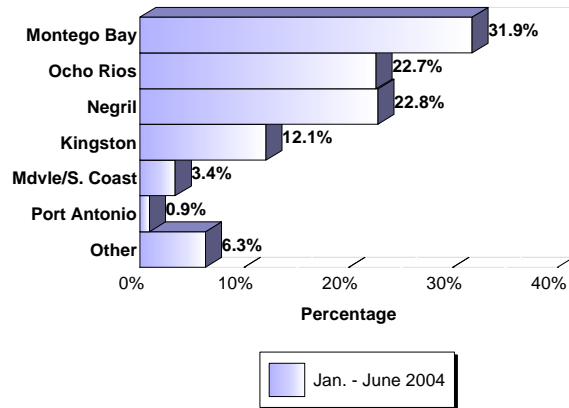


Fig. 5

STOPOVER ARRIVALS BY INTENDED AREA OF STAY

Area	JUNE		JAN.- JUN.		JAN.- JUN.		%Change 2004/03
	2004	%Share	2004	%Share	2003	%Share	
Montego Bay	38,990	29.2%	236,446	31.9%	220,072	32.4%	7.4%
Ocho Rios	29,548	22.2%	168,178	22.7%	149,217	22.0%	12.7%
Negril	28,593	21.4%	169,181	22.8%	148,078	21.8%	14.3%
Kingston	18,922	14.2%	89,820	12.1%	87,835	12.9%	2.3%
Mdvle/S. Coast	5,781	4.3%	25,227	3.4%	22,584	3.3%	11.7%
Port Antonio	1,272	1.0%	6,927	0.9%	6,431	0.9%	7.7%
Other	10,287	7.7%	46,559	6.3%	44,098	6.5%	5.6%
Total	133,393	100.0%	742,338	100.0%	678,315	100.0%	9.4%