

JAMAICA TOURIST BOARD

IN MARCH 2005.....

- Stopover arrivals up by 13.5%
- US Market increased by 18%
- Canada increased by 16%
- Europe declined by 7%
- Cruise Passenger arrivals up by 17%.

TOURIST (Stopover Arrivals)

Stopover arrivals in March 2005 were **155,103**, an increase of **13.5%** over the **136,606** recorded for March 2004. This stopover arrival figure represents the highest for the month of March, surpassing the previous record of 143,282 in March 2001.

For the first quarter of 2005, January to March, arrivals increased by **8%** with **394,969** compared to **366,085** in 2004.

United States

Stopover arrivals from the United States market increased by **18%** in March with a total of **116,435** visitors compared to the **98,585** visitors who came in March 2004. All US marketing regions recorded increases. The Northeast increased by **18%**, the South by **32%** the West by **25%** and the Midwest by **7%**.

For the January to March period, the US market increased by **8%**. Total visitors from that market was **275,774** compared to **255,855** for the corresponding period in 2004. Three of the four main marketing regions recorded growth. The Northeast increased by **9%**, the South was up by **18%** and the West was up **12%**. The Midwest recorded a decline of less than **1%**.

Canada

In March, the Canadian market continued to perform well, recording a **16%** increase with a total of **13,008** stopovers compared to **11,239** in 2004. The leading province of Ontario increased by **17%**, while the second most important visitor-producing province of Quebec increased by **8%**.

Cumulatively, the Canadian market increased by **21%** in the January to March period with a total of **43,728** stopovers compared to **36,104** in 2004. The main provinces of Ontario and Quebec increased by **20%** and **37%** respectively. The other notable increases were Alberta **31%** and British Columbia **35%**.

Europe

The European market recorded a decline of **7%** in March 2005. The market provided a total of **19,539** stopover visitors compared to the **21,009** recorded in March 2004. The main producing country within the European market, the United Kingdom declined by **14%**. All the other main European country markets recorded increases: Italy up **1%**, Germany up **11%**, Belgium and Sweden recorded triple-digit increases of **105%** and **117%** respectively, and the Netherlands, recorded a double-digit increase of **76%**.

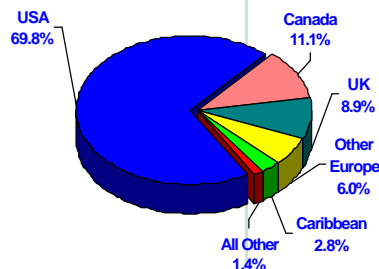
For the first quarter period, January to March, the European market increased by less than **1%**. Total stopovers for the period was **58,943** compared to **58,976** in 2004. The United Kingdom, with a total of **35,156** stopovers, declined by **7%**. The other two leading European countries, Italy with a total of **8,047** and Germany with **6,453** stopovers, increased by **5%** and **9%** respectively.

Latin America

The Latin American market decreased by **34%** in March with a total of **799** stopovers compared to **1,209** in March 2004.

For the January to March period, the Latin American market decreased by **12%** with a total of **2,493** visitors compared to **2,816** for the corresponding period in 2004.

STOPOVER ARRIVALS BY MARKET SHARE
January - March 2005



The Caribbean

Visitors to Jamaica from the Caribbean region increased by **18%** in March with a total of **4,230** visitors, compared to **3,585** in March 2004.

The major Caribbean countries which provided visitors to Jamaica in March were: the Cayman Islands (**1,393**), Trinidad and Tobago (**778**), Barbados (**519**), the Bahamas (**246**), Dominican Rep. (**143**), Antigua (**142**), and Bermuda (**125**).

Cumulatively, the Caribbean stopovers arrivals to Jamaica in the January to March period increased by **16%**, moving from **9,387** in 2004 to **10,926** in 2005. The Cayman Islands is the leading provider of visitors to Jamaica from the Caribbean region. In the period under review, they provided a total of **3,603** visitors followed by Trinidad and Tobago with **1,756**, Barbados with **1,191** and the Bahamas with **604** visitors.

Japan

The Japanese market declined by less than **1%** in March with a total of **470** stopovers compared to **472** in March 2004.

Cumulatively for the January to March period, a total of **1,320** Japanese visitors came to Jamaica. This was down from the **1,358** recorded for the corresponding period in 2004.

Other Countries

Of the other countries, Australia with **149** stopovers in March in-

creased by **25%** against the **119** who came in 2004.

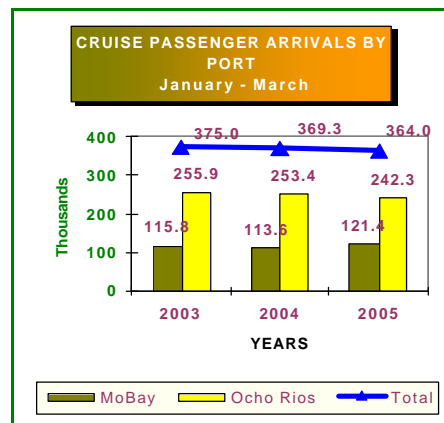
Market Share

The market share of stopover visitors for the first quarter January to March period was as follows:

USA **69.8%**; Canada **11.1%**; UK **8.9%**; Continental Europe **6.0%**, the Caribbean **2.8%**; Latin America **0.6%**; Japan **0.3%** and Other Countries **0.5%**.

Cruise Passengers

A total of **150,871** cruise passengers visited Jamaica in March 2005. This represents a **17%** increase against the **129,266** recorded for March 2004. Cumulatively, a total of **374,973** cruise passengers visited our shores in the first quarter period, January to March, a growth of **2%** against the **369,267** recorded for the corresponding period in 2004.



A total of **99,635** cruise passengers visited the port of Ocho Rios in March, an increase of **15%** over the **86,847** recorded for March 2004. For the January to March period, cruise passenger arrivals to the port of Ocho Rios was **255,929**, a growth of **1%** against the **253,362** recorded for the cor-

responding period in 2004.

Montego Bay recorded a total of **49,843** cruise passengers for the month, a growth of some **20%** against the **41,704** recorded for 2004. Cumulatively, for the January to March period, cruise passenger arrivals to the port of Montego Bay was **115,807**, an increase of **2%** against the **113,630** recorded for the same period in 2004.

Length of Stay

The average length of stay of stopovers in March was **8.5** nights against **8.6** nights recorded in March 2004. The average length of stay in hotels was **6.6** nights compared to **6.2** nights in March 2004. Cumulatively, the average length of stay for the January to March period was **9** nights against the **9.3** nights recorded for the similar period in 2004.

Purpose of Visit

During the period under review January to March 2005, **82%** or **308,358** of the **377,041** Foreign Nationals who visited Jamaica were visiting for the purpose of Leisure, **6%** were on Business, another **6%** were Visiting Friends & Relatives, and the remaining **7%** were on Other purposes of travel.

A total of **7,026** or **39%** of the **17,928** Non-Resident Jamaicans who travelled to Jamaica during the period January to March 2005 were visiting for Leisure, **26%** were visiting Friends & Relatives, **9%** were on Business and the remaining **26%** were on Other purposes of travel.

TABLE 1
TOURIST ARRIVALS
 January - March
 2005

Month	Foreign Nationals	<----- Stopovers ----->					Total Stopover Arrivals	+/- 2005/04	+/- 2005/03
		+/- 2005/04	+/- 2005/03	Non-Resident Jamaicans	+/- 2005/04	+/- 2005/03			
January	112,033	7.3%	16.9%	4,811	-2.3%	-11.4%	116,844	6.9%	15.3%
February	117,828	2.3%	10.7%	5,194	5.0%	3.5%	123,022	2.4%	10.4%
March	147,180	12.7%	18.6%	7,923	32.7%	48.3%	155,103	13.5%	19.8%
Jan.-Mar.	377,041	7.7%	15.5%	17,928	13.2%	13.5%	394,969	7.9%	15.4%

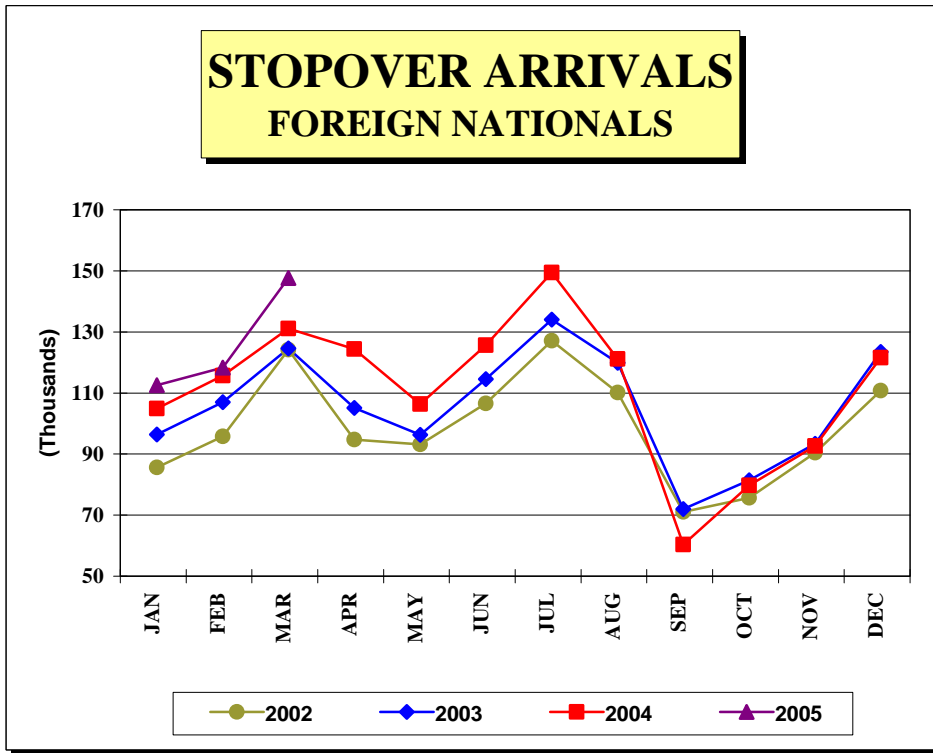


FIG. 1

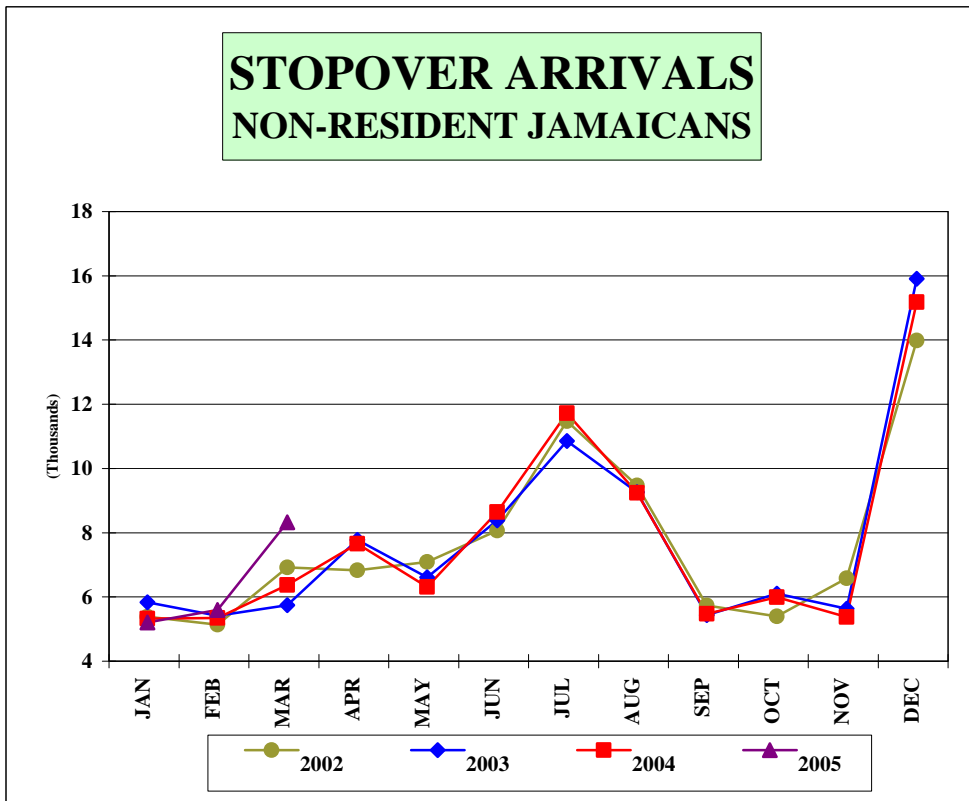


FIG. 1a

**STOPOVER ARRIVALS BY PURPOSE OF VISIT
JANUARY - MARCH 2005**

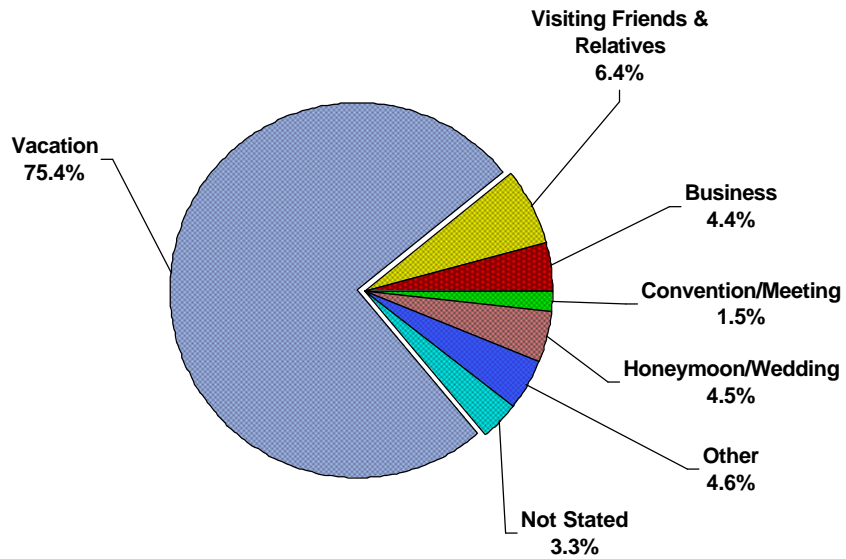


Fig. 1b

STOPOVER ARRIVALS BY PURPOSE OF VISIT						
January - March 2005	Foreign Nationals	% Share	Non Resident Jamaicans	% Share	Total	% Share
Vacation	291,113	77.2%	6,694	37.3%	297,807	75.4%
Visiting Friends & Relatives	20,758	5.5%	4,645	25.9%	25,403	6.4%
Business	15,788	4.2%	1,474	8.2%	17,262	4.4%
Convention/Meeting	5,593	1.5%	160	0.9%	5,753	1.5%
Honeymoon/Wedding	17,245	4.6%	332	1.9%	17,577	4.5%
Other	15,752	4.2%	2,320	12.9%	18,072	4.6%
Not Stated	10,792	2.9%	2,303	12.8%	13,095	3.3%
TOTAL	377,041	100.0%	17,928	100.0%	394,969	100.0%

TABLE 1.2

**STOPOVER ARRIVALS BY MARKET REGION
AND MONTH OF ARRIVAL 2005**

	U.S.A.				Canada	U.K. Europe	Latin America	Caribbean	Asia	Other Countries	Total
	Northeast	Mid-West	South	West							
January	31,985	22,942	14,711	4,577	16,220	20,985	827	3,593	652	352	116,844
February	38,943	25,167	16,541	4,473	14,500	18,419	867	3,103	704	305	123,022
March	50,645	31,477	27,470	6,843	13,008	19,539	799	4,230	725	367	155,103
Jan.-Mar.	121,573	79,586	58,722	15,893	43,728	58,943	2,493	10,926	2,081	1,024	394,969
+/- %	8.7%	-0.5%	17.7%	11.8%	21.1%	-0.1%	-11.5%	16.4%	6.9%	2.4%	7.9%

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	MARCH							JANUARY - MARCH								
	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>			<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>				
					2005/04	2005/03	2005/02					2005/04	2005/03	2005/02		
U.S.A.																
<u>NORTHEAST (NEW YORK)</u>																
Connecticut	2,376	2,700	2,848	3,294	15.7	22.0	38.6	5,522	6,429	6,858	7,750	13.0	20.5	40.3		
Delaware	555	493	453	638	40.8	29.4	15.0	1,151	1,282	1,292	1,405	8.7	9.6	22.1		
Maine	357	358	521	516	-1.0	44.1	44.5	801	885	1,223	1,239	1.3	40.0	54.7		
Maryland	3,271	2,882	3,412	4,335	27.1	50.4	32.5	7,736	8,000	8,721	9,855	13.0	23.2	27.4		
Massachusetts	3,596	3,954	4,586	3,856	-15.9	-2.5	7.2	9,177	9,769	11,263	10,453	-7.2	7.0	13.9		
New Hampshire	517	647	726	643	-11.4	-0.6	24.4	1,470	1,566	1,930	1,809	-6.3	15.5	23.1		
New Jersey	5,918	5,986	6,024	7,651	27.0	27.8	29.3	13,736	14,826	15,252	17,493	14.7	18.0	27.4		
New York	16,637	13,361	14,465	17,769	22.8	33.0	6.8	37,921	37,219	40,463	44,826	10.8	20.4	18.2		
Pennsylvania	5,852	6,069	6,083	7,131	17.2	17.5	21.9	13,541	15,242	15,529	16,089	3.6	5.6	18.8		
Rhode Island	363	515	531	417	-21.5	-19.0	14.9	924	1,157	1,256	1,321	5.2	14.2	43.0		
Vermont	237	209	286	329	15.0	57.4	38.8	517	577	785	798	1.7	38.3	54.4		
Virginia	2,354	2,320	2,249	3,129	39.1	34.9	32.9	5,017	5,141	5,454	6,544	20.0	27.3	30.4		
Washington D.C.	492	533	480	650	35.4	22.0	32.1	1,138	1,233	1,165	1,387	19.1	12.5	21.9		
West Virginia	239	235	244	287	17.6	22.1	20.1	458	439	606	604	-0.3	37.6	31.9		
Total	42,764	40,262	42,908	50,645	18.0	25.8	18.4	99,109	103,765	111,797	121,573	8.7	17.2	22.7		
<u>MIDWEST (CHICAGO)</u>																
Illinois	5,758	6,884	6,823	6,307	-7.6	-8.4	9.5	15,039	16,947	16,959	15,006	-11.5	-11.5	-0.2		
Indiana	1,733	2,051	1,870	1,743	-6.8	-15.0	0.6	4,003	4,409	4,226	4,367	3.3	-1.0	9.1		
Iowa	985	1,123	1,020	1,243	21.9	10.7	26.2	3,207	3,611	3,859	3,623	-6.1	0.3	13.0		
Kansas	516	534	650	702	8.0	31.5	36.0	1,067	1,241	1,580	1,714	8.5	38.1	60.6		
Kentucky	732	582	653	515	-21.1	-11.5	-29.6	1,582	1,410	1,532	1,310	-14.5	-7.1	-17.2		
Michigan	4,312	4,350	3,730	4,293	15.1	-1.3	-0.4	9,927	10,649	10,955	10,611	-3.1	-0.4	6.9		
Minnesota	3,764	4,102	3,986	5,123	28.5	24.9	36.1	9,812	10,758	11,003	13,545	23.1	25.9	38.0		
Missouri	1,911	2,032	2,493	2,462	-1.2	21.2	28.8	4,715	5,457	6,393	6,092	-4.7	11.6	29.2		
Nebraska	365	430	453	459	1.3	6.7	25.8	1,052	1,486	1,536	1,341	-12.7	-9.8	27.5		
North Dakota	201	199	299	258	-13.7	29.6	28.4	512	565	922	872	-5.4	54.3	70.3		
Ohio	2,873	2,414	2,483	2,742	10.4	13.6	-4.6	6,150	5,544	5,782	6,013	4.0	8.5	-2.2		
South Dakota	129	312	265	285	7.5	-8.7	120.9	499	876	934	1,001	7.2	14.3	100.6		
Wisconsin	4,474	4,303	4,668	5,345	14.5	24.2	19.5	12,215	12,721	14,276	14,091	-1.3	10.8	15.4		
Total	27,753	29,316	29,393	31,477	7.1	7.4	13.4	69,780	75,674	79,957	79,586	-0.5	5.2	14.1		

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MARCH</u>						<u>JANUARY - MARCH</u>							
	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>			<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>		
					2005/04	2005/03	2005/02					2005/04	2005/03	2005/02
<u>SOUTH (MIAMI)</u>														
Alabama	697	804	837	721	-13.9	-10.3	3.4	1,415	1,635	1,507	1,474	-2.2	-9.8	4.2
Arkansas	270	271	331	361	9.1	33.2	33.7	554	661	774	794	2.6	20.1	43.3
Florida	10,154	9,313	9,407	13,504	43.6	45.0	33.0	23,561	23,153	23,853	28,620	20.0	23.6	21.5
Georgia	3,488	3,065	3,125	3,236	3.6	5.6	-7.2	7,752	7,986	7,485	7,303	-2.4	-8.6	-5.8
Louisiana	308	331	266	463	74.1	39.9	50.3	982	973	872	1,062	21.8	9.1	8.1
Mississippi	306	293	277	296	6.9	1.0	-3.3	567	559	498	557	11.8	-0.4	-1.8
North Carolina	1,858	1,684	1,644	2,144	30.4	27.3	15.4	3,974	4,217	4,176	5,201	24.5	23.3	30.9
Oklahoma	301	261	310	584	88.4	123.8	94.0	661	667	792	1,152	45.5	72.7	74.3
South Carolina	614	640	582	732	25.8	14.4	19.2	1,456	1,675	1,627	1,857	14.1	10.9	27.5
Tennessee	1,306	1,466	1,307	1,447	10.7	-1.3	10.8	2,735	3,064	2,703	2,815	4.1	-8.1	2.9
Texas	3,003	3,255	2,703	3,982	47.3	22.3	32.6	6,219	6,188	5,594	7,887	41.0	27.5	26.8
Total	22,305	21,383	20,789	27,470	32.1	28.5	23.2	49,876	50,778	49,881	58,722	17.7	15.6	17.7
<u>WEST (LOS ANGELES)</u>														
Alaska	31	30	43	38	-11.6	26.7	22.6	88	115	130	132	1.5	14.8	50.0
Arizona	412	450	435	554	27.4	23.1	34.5	1,043	965	1,072	1,189	10.9	23.2	14.0
California	3,290	2,634	2,940	3,760	27.9	42.7	14.3	7,473	7,057	7,511	8,595	14.4	21.8	15.0
Colorado	921	756	924	861	-6.8	13.9	-6.5	2,096	1,705	2,214	1,901	-14.1	11.5	-9.3
Hawaii	13	44	30	20	-33.3	-54.5	53.8	34	73	81	48	-40.7	-34.2	41.2
Idaho	102	128	64	132	106.3	3.1	29.4	292	405	247	346	40.1	-14.6	18.5
Montana	118	94	86	94	9.3	0.0	-20.3	255	271	304	293	-3.6	8.1	14.9
Nevada	198	236	122	308	152.5	30.5	55.6	420	536	408	685	67.9	27.8	63.1
New Mexico	109	102	89	127	42.7	24.5	16.5	214	209	238	244	2.5	16.7	14.0
Oregon	282	312	237	283	19.4	-9.3	0.4	603	621	583	634	8.7	2.1	5.1
Utah	93	160	131	130	-0.8	-18.8	39.8	313	447	362	449	24.0	0.4	43.5
Washington	364	430	353	468	32.6	8.8	28.6	988	1,024	939	1,242	32.3	21.3	25.7
Wyoming	37	73	41	68	65.9	-6.8	83.8	84	133	131	135	3.1	1.5	60.7
Total	5,970	5,449	5,495	6,843	24.5	25.6	14.6	13,903	13,561	14,220	15,893	11.8	17.2	14.3
TOTAL U.S.A.	98,792	96,410	98,585	116,435	18.1	20.8	17.9	232,668	243,778	255,855	275,774	7.8	13.1	18.5

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TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	MARCH						JANUARY - MARCH							
	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>			<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>		
					2005/04	2005/03	2005/02					2005/04	2005/03	2005/02
<u>CANADA (TORONTO)</u>														
Alberta	351	395	662	915	38.2	131.6	160.7	1,274	1,524	2,589	3,388	30.9	122.3	165.9
British Columbia	250	245	407	465	14.3	89.8	86.0	873	917	1,181	1,588	34.5	73.2	81.9
Manitoba	156	479	354	347	-2.0	-27.6	122.4	768	1,864	1,521	1,291	-15.1	-30.7	68.1
New Brunswick	198	214	169	260	53.8	21.5	31.3	424	462	482	516	7.1	11.7	21.7
Newfoundland	64	53	50	53	6.0	0.0	-17.2	189	187	129	174	34.9	-7.0	-7.9
Nova Scotia	160	284	397	362	-8.8	27.5	126.3	511	676	860	894	4.0	32.2	75.0
Ontario	8,407	7,288	7,666	8,955	16.8	22.9	6.5	24,194	22,617	23,317	27,853	19.5	23.2	15.1
P.E. Island	40	64	59	22	-62.7	-65.6	-45.0	70	90	101	78	-22.8	-13.3	11.4
Quebec	1,854	1,631	1,375	1,478	7.5	-9.4	-20.3	4,978	4,785	5,202	7,125	37.0	48.9	43.1
Saskatchewan	64	109	78	128	64.1	17.4	100.0	370	678	633	741	17.1	9.3	100.3
Other Canada	29	17	22	23	4.5	35.3	-20.7	111	74	89	80	-10.1	8.1	-27.9
Total	11,573	10,779	11,239	13,008	15.7	20.7	12.4	33,762	33,874	36,104	43,728	21.1	29.1	29.5
<u>LONDON OFFICE</u>														
<u>Northern Europe</u>														
U.K.	10,257	11,334	14,799	12,746	-13.9	12.5	24.3	28,208	31,523	37,618	35,156	-6.5	11.5	24.6
Denmark	36	30	38	49	28.9	63.3	36.1	157	117	210	178	-15.2	52.1	13.4
Finland	40	48	23	39	69.6	-18.8	-2.5	121	216	188	119	-36.7	-44.9	-1.7
Norway	93	59	58	75	29.3	27.1	-19.4	244	273	221	250	13.1	-8.4	2.5
Sweden	118	84	78	169	116.7	101.2	43.2	385	280	376	409	8.8	46.1	6.2
<u>Southern Europe</u>														
Greece	16	14	14	42	200.0	200.0	162.5	55	105	37	85	129.7	-19.0	54.5
Italy	1,145	2,539	2,194	2,218	1.1	-12.6	93.7	3,539	8,295	7,669	8,047	4.9	-3.0	127.4
Portugal	26	34	46	26	-43.5	-23.5	0.0	52	118	126	69	-45.2	-41.5	32.7
Spain	116	127	104	149	43.3	17.3	28.4	347	326	264	327	23.9	0.3	-5.8
<u>Western Europe</u>														
Austria	150	144	252	171	-32.1	18.8	14.0	570	617	1,104	1,067	-3.4	72.9	87.2
Belgium	119	112	154	316	105.2	182.1	165.5	302	296	486	1,189	144.7	301.7	293.7
France	210	210	246	229	-6.9	9.0	9.0	714	719	860	1,273	48.0	77.1	78.3
Germany	1,293	1,612	1,981	2,190	10.6	35.9	69.4	3,808	4,733	5,934	6,453	8.7	36.3	69.5
Luxemburg	10	4	4	5	25.0	25.0	-50.0	15	18	33	33	0.0	83.3	120.0
Netherlands	148	248	250	441	76.4	77.8	198.0	471	804	880	1,609	82.8	100.1	241.6
Switzerland	184	169	426	298	-30.0	76.3	62.0	470	561	1,427	1,202	-15.8	114.3	155.7
<u>Central/East Europe</u>														
Czechoslovakia	22	53	57	63	10.5	18.9	186.4	82	142	166	129	-22.3	-9.2	57.3
Hungary	9	7	15	13	-13.3	85.7	44.4	73	51	86	132	53.5	158.8	80.8
Poland	38	69	62	66	6.5	-4.3	73.7	151	262	341	254	-25.5	-3.1	68.2
Russia	166	72	82	92	12.2	27.8	-44.6	386	353	354	464	31.1	31.4	20.2
Other Europe	101	119	126	142	12.7	19.3	40.6	248	377	596	498	-16.4	32.1	100.8
Total	14,297	17,088	21,009	19,539	-7.0	14.3	36.7	40,398	50,186	58,976	58,943	-0.1	17.4	45.9

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MARCH</u>							<u>JANUARY - MARCH</u>						
	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>			<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>% Change</u>		
					2005/04	2005/03	2005/02					2005/04	2005/03	2005/02
<u>LATIN AMERICA</u>														
<u>CENTRAL AMERICA</u>														
Mexico	189	186	389	135	-65.3	-27.4	-28.6	413	401	620	373	-39.8	-7.0	-9.7
Belize	50	90	46	48	4.3	-46.7	-4.0	113	312	108	135	25.0	-56.7	19.5
Costa Rica	42	38	60	57	-5.0	50.0	35.7	190	135	143	173	21.0	28.1	-8.9
El Salvador	19	8	9	11	22.2	37.5	-42.1	59	26	20	38	90.0	46.2	-35.6
Guatemala	51	51	22	27	22.7	-47.1	-47.1	93	83	74	69	-6.8	-16.9	-25.8
Honduras	8	16	49	15	-69.4	-6.3	87.5	33	44	73	45	-38.4	2.3	36.4
Nicaragua	5	4	7	2	-71.4	-50.0	-60.0	22	10	16	11	-31.3	10.0	-50.0
Panama	88	79	96	78	-18.8	-1.3	-11.4	248	272	308	226	-26.6	-16.9	-8.9
Total	452	472	678	373	-45.0	-21.0	-17.5	1,171	1,283	1,362	1,070	-21.4	-16.6	-8.6
<u>SOUTH AMERICA</u>														
Argentina	35	46	29	35	20.7	-23.9	0.0	137	162	148	143	-3.4	-11.7	4.4
Bolivia	7	5	3	2	-33.3	-60.0	-71.4	16	19	11	9	-18.2	-52.6	-43.8
Brazil	92	67	157	75	-52.2	11.9	-18.5	244	202	287	243	-15.3	20.3	-0.4
Chile	23	24	53	18	-66.0	-25.0	-21.7	156	111	168	95	-43.5	-14.4	-39.1
Colombia	43	28	22	45	104.5	60.7	4.7	151	245	82	85	3.7	-65.3	-43.7
Ecuador	9	2	4	5	25.0	150.0	-44.4	40	8	31	57	83.9	612.5	42.5
Guyana	84	132	135	121	-10.4	-8.3	44.0	270	390	382	392	2.6	0.5	45.2
Paraguay	3	0	3	1	-66.7	-	-66.7	7	5	9	1	-88.9	-80.0	-85.7
Peru	35	21	42	21	-50.0	0.0	-40.0	75	71	82	74	-9.8	4.2	-1.3
Surinam	18	26	15	44	193.3	69.2	144.4	33	67	60	147	145.0	119.4	345.5
Uruguay	7	8	8	3	-62.5	-62.5	-57.1	23	16	35	11	-68.6	-31.3	-52.2
Venezuela	79	61	60	55	-8.3	-9.8	-30.4	224	176	159	159	0.0	-9.7	-29.0
Other South America	0	0	0	1	-	-	-	0	1	0	7	-	600.0	-
Total	435	420	531	426	-19.8	1.4	-2.1	1,376	1,473	1,454	1,423	-2.1	-3.4	3.4
Total Latin America	887	892	1,209	799	-33.9	-10.4	-9.9	2,547	2,756	2,816	2,493	-11.5	-9.5	-2.1

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	MARCH						JANUARY - MARCH							
	2002	2003	2004	2005	% Change			2002	2003	2004	2005	% Change		
					2005/04	2005/03	2005/02					2005/04	2005/03	2005/02
CARIBBEAN														
Antigua	116	98	167	142	-15.0	44.9	22.4	291	287	432	416	-3.7	44.9	43.0
Bahamas	396	198	202	246	21.8	24.2	-37.9	853	557	554	604	9.0	8.4	-29.2
Barbados	383	484	470	519	10.4	7.2	35.5	1,032	1,111	1,075	1,191	10.8	7.2	15.4
Bermuda	179	277	209	125	-40.2	-54.9	-30.2	392	560	463	376	-18.8	-32.9	-4.1
British Virgin Is.	41	28	77	65	-15.6	132.1	58.5	80	90	156	149	-4.5	65.6	86.3
Cayman Is.	968	798	958	1,393	45.4	74.6	43.9	2,166	2,368	2,735	3,603	31.7	52.2	66.3
Dominica	21	25	24	32	33.3	28.0	52.4	46	71	56	108	92.9	52.1	134.8
Grenada	42	40	46	52	13.0	30.0	23.8	120	122	120	189	57.5	54.9	57.5
Monsterrat	6	7	10	7	-30.0	0.0	16.7	14	20	25	19	-24.0	-5.0	35.7
St. Kitts/Nevis/Anguilla	43	47	65	73	12.3	55.3	69.8	109	143	171	183	7.0	28.0	67.9
St. Lucia	96	143	123	109	-11.4	-23.8	13.5	253	402	334	428	28.1	6.5	69.2
St. Vincent	16	34	36	41	13.9	20.6	156.3	107	105	124	133	7.3	26.7	24.3
Turks & Caicos Is.	78	37	69	121	75.4	227.0	55.1	152	159	226	216	-4.4	35.8	42.1
Trinidad & Tobago	679	522	656	778	18.6	49.0	14.6	1,484	1,496	1,603	1,756	9.5	17.4	18.3
Comm. Caribbean	3,064	2,738	3,112	3,703	19.0	35.2	20.9	7,099	7,491	8,074	9,371	16.1	25.1	32.0
Aruba	45	45	28	28	0.0	-37.8	-37.8	77	107	62	94	51.6	-12.1	22.1
Bonaire	0	0	3	5	66.7	-	-	0	0	4	16	300.0	-	-
Cuba	78	41	35	31	-11.4	-24.4	-60.3	173	161	132	150	13.6	-6.8	-13.3
Curacao	71	99	61	92	50.8	-7.1	29.6	154	245	182	257	41.2	4.9	66.9
Dominican Republic	101	60	72	143	98.6	138.3	41.6	205	157	222	391	76.1	149.0	90.7
Guadelope	3	12	30	18	-40.0	50.0	500.0	19	17	38	25	-34.2	47.1	31.6
Haiti	70	86	21	23	9.5	-73.3	-67.1	151	210	90	55	-38.9	-73.8	-63.6
Puerto Rico	147	122	162	112	-30.9	-8.2	-23.8	414	305	375	319	-14.9	4.6	-22.9
St. Maarten	34	51	35	50	42.9	-2.0	47.1	79	102	115	120	4.3	17.6	51.9
All other Caribbean	30	65	26	25	-3.8	-61.5	-16.7	84	122	93	128	37.6	4.9	52.4
Other Caribbean	579	581	473	527	11.4	-9.3	-9.0	1,356	1,426	1,313	1,555	18.4	9.0	14.7
TOTAL CARIBBEAN	3,643	3,319	3,585	4,230	18.0	27.4	16.1	8,455	8,917	9,387	10,926	16.4	22.5	29.2
OTHER COUNTRIES														
African Countries	45	59	76	81	6.6	37.3	80.0	166	166	248	184	-25.8	10.8	10.8
Isreal	38	56	48	71	47.9	26.8	86.8	170	172	229	260	13.5	51.2	52.9
Saudi Arabia	1	3	1	2	100.0	-33.3	100.0	2	6	3	2	-33.3	-66.7	0.0
Turkey	7	15	19	20	5.3	33.3	185.7	37	45	53	44	-17.0	-2.2	18.9
Other Middle East	25	26	7	26	271.4	0.0	4.0	52	50	50	60	20.0	20.0	15.4
India & Pakistan	65	51	64	65	1.6	27.5	0.0	130	102	139	131	-5.8	28.4	0.8
Japan	460	360	472	470	-0.4	30.6	2.2	1,090	1,046	1,358	1,320	-2.8	26.2	21.1
China	87	64	39	39	0.0	-39.1	-55.2	136	189	98	198	102.0	4.8	45.6
Taiwan	5	7	8	10	25.0	42.9	100.0	12	24	12	23	91.7	-4.2	91.7
Korea	37	10	14	14	0.0	40.0	-62.2	62	53	69	44	-36.2	-17.0	-29.0
Philippines	64	152	42	65	54.8	-57.2	1.6	136	404	163	207	27.0	-48.8	52.2
Singapore	9	13	13	38	192.3	192.3	322.2	12	28	35	66	88.6	135.7	450.0
Other Asia	25	38	34	24	-29.4	-36.8	-4.0	44	65	73	92	26.0	41.5	109.1
Australia	107	127	119	149	25.2	17.3	39.3	339	346	352	413	17.3	19.4	21.8
New Zealand	22	16	21	17	-19.0	6.3	-22.7	74	39	56	56	0.0	43.6	-24.3
All Other Ctries	11	0	2	1	-50.0	-	-90.9	15	3	9	5	-44.4	66.7	-66.7
Total	1,008	997	979	1,092	11.5	9.5	8.3	2,477	2,738	2,947	3,105	5.4	13.4	25.4
GRAND TOTAL	130,200	129,485	136,606	155,103	13.5	19.8	19.1	320,307	342,249	366,085	394,969	7.9	15.4	23.3

STOPOVER VISITORS BY MARKET SHARE

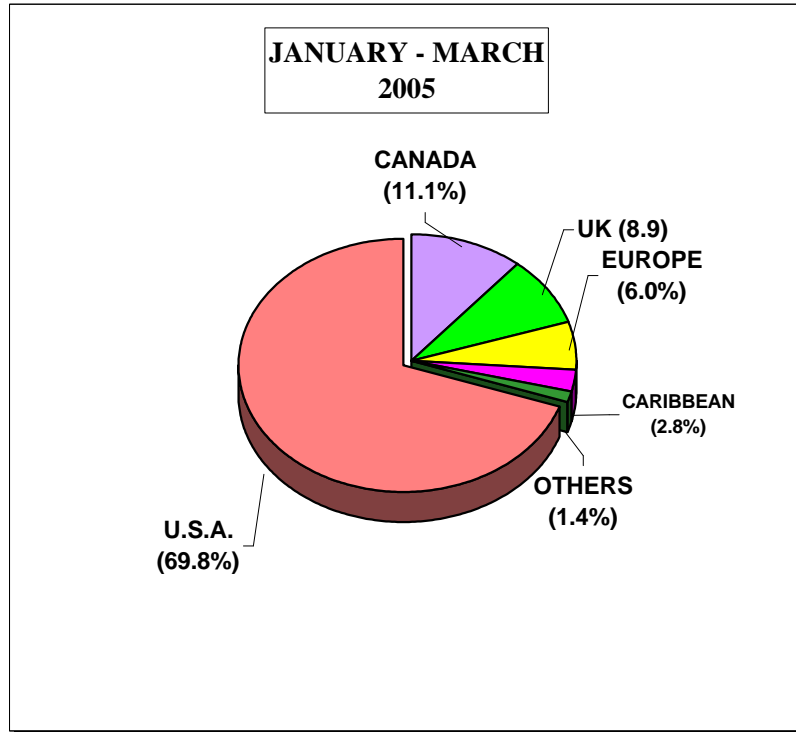


Fig. 2

Country	March 2005	% Share	Jan. - Mar. 2005	% Share	Jan. - Mar. 2004	% Share	%Change 2005/04
U.S.A	116,435	75.1%	275,774	69.8%	255,855	69.9%	7.8%
CANADA	13,008	8.4%	43,728	11.1%	36,104	9.9%	21.1%
U.K.	12,746	8.2%	35,156	8.9%	37,618	10.3%	-6.5%
EUROPE	6,793	4.4%	23,787	6.0%	21,358	5.8%	11.4%
CARIBBEAN	4,230	2.7%	10,926	2.8%	9,387	2.6%	16.4%
OTHERS	1,891	1.2%	5,598	1.4%	5,763	1.6%	-2.9%
Total	155,103	100.0%	394,969	100.0%	366,085	100.0%	7.9%

TABLE 3

<u>AVERAGE LENGTH OF STAY (Nights)</u>				
<u>FOREIGN NATIONALS</u>				
	All Types of Accommodation		Hotel	
	2004	2005	2004	2005
January	9.8	9.8	6.7	7.2
February	8.9	8.8	6.5	6.9
March	8.6	8.5	6.2	6.6
Jan. - Mar.	9.3	9.0	6.3	6.9

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

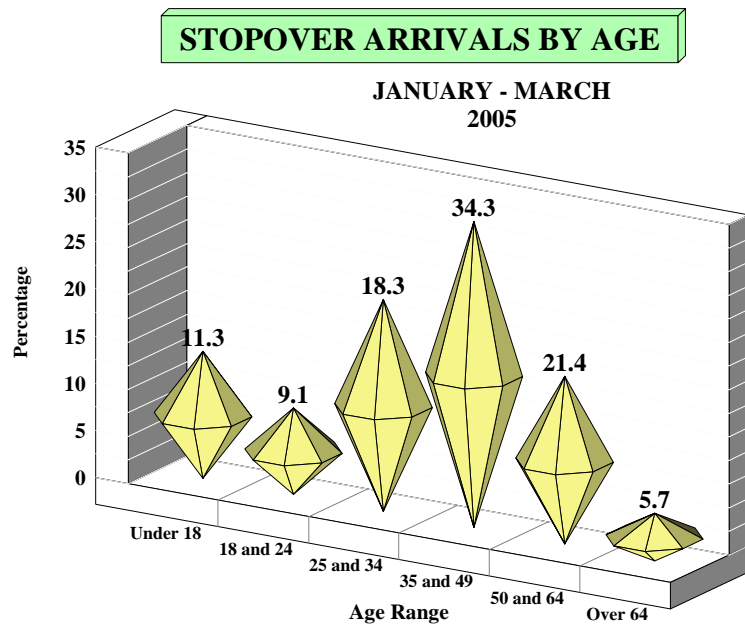


Fig. 3

AGE DISTRIBUTION OF STOPOVER ARRIVALS

Age	MARCH		JAN. - MAR.		JAN. - MAR.		%Change 2005/04
	2005	% Share	2005	% Share	2004	% Share	
Under 18	22,121	14.3	44,549	11.3	37,150	10.1	19.9%
18 and 24	22,106	14.3	35,903	9.1	35,973	9.8	-0.2%
25 and 34	27,620	17.8	72,235	18.3	70,715	19.3	2.1%
35 and 49	48,820	31.5	135,424	34.3	126,135	34.5	7.4%
50 and 64	27,473	17.7	84,398	21.4	75,778	20.7	11.4%
Over 64	6,963	4.5	22,460	5.7	20,334	5.6	10.5%
Total	155,103	100.0	394,969	100.0	366,085	100.0	7.9%

TABLE 4**CRUISE PASSENGER ARRIVALS BY MONTH AND PORT OF CALL
JANUARY - MARCH 2005**

	MONTEGO BAY		% Change 2005/04		OCHO RIOS		% Change 2005/04		2005 TOTAL		2004 TOTAL		% Change 2005/04	
	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX	CALLS	PAX
January	21	30,817	-4.5%	-10.1%	34	80,054	-19.0%	-10.1%	57	111,841	67	124,650	-14.9%	-10.3%
February	21	35,147	-12.5%	-6.6%	33	76,240	6.5%	-1.6%	57	112,261	56	115,351	1.8%	-2.7%
March	28	49,843	21.7%	19.5%	44	99,635	29.4%	14.7%	74	150,871	58	129,266	27.6%	16.7%
Jan. - Mar.	70	115,807	1.4%	1.9%	111	255,929	3.7%	1.0%	188	374,973	181	369,267	3.9%	1.5%

- * Note:
1. During the month of January two Cruise Ship calls with 2,593 Cruise passengers visited two ports.
 2. Included in the total Cruise passengers for the month of January, 2 calls with 970 passengers visited Port Antoinio.
 3. During the month of February two Cruise Ship calls with 2,489 Cruise passengers visited two ports.
 4. Included in the total Cruise passengers for the month of February, 3 calls with 874 passengers visited Port Antoinio.
 5. During the month of March three Cruise Ship calls with 3,281 Cruise passengers visited two ports.
 6. Included in the total Cruise passengers for the month of March, 2 calls with 1,393 passengers visited Port Antoinio.

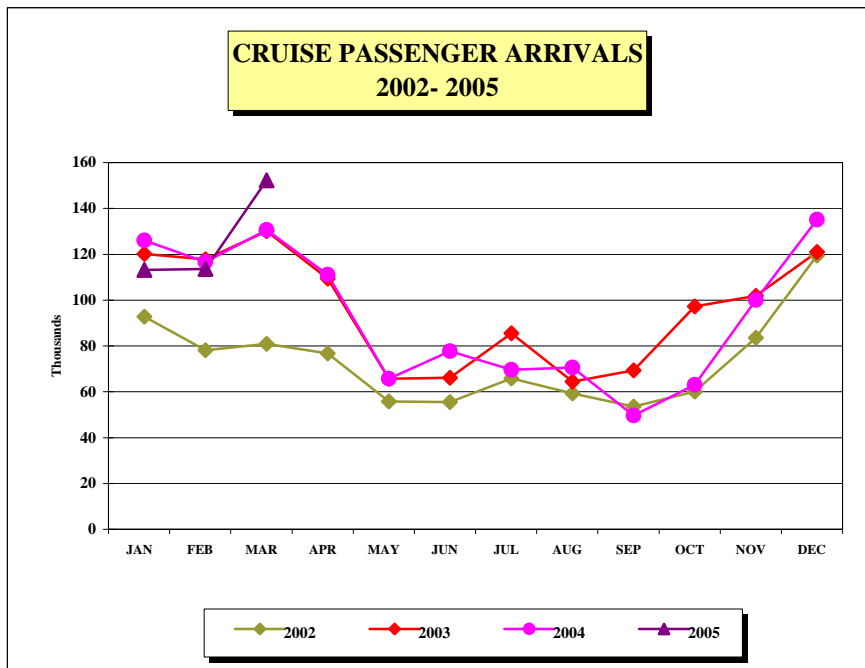


FIG. 4

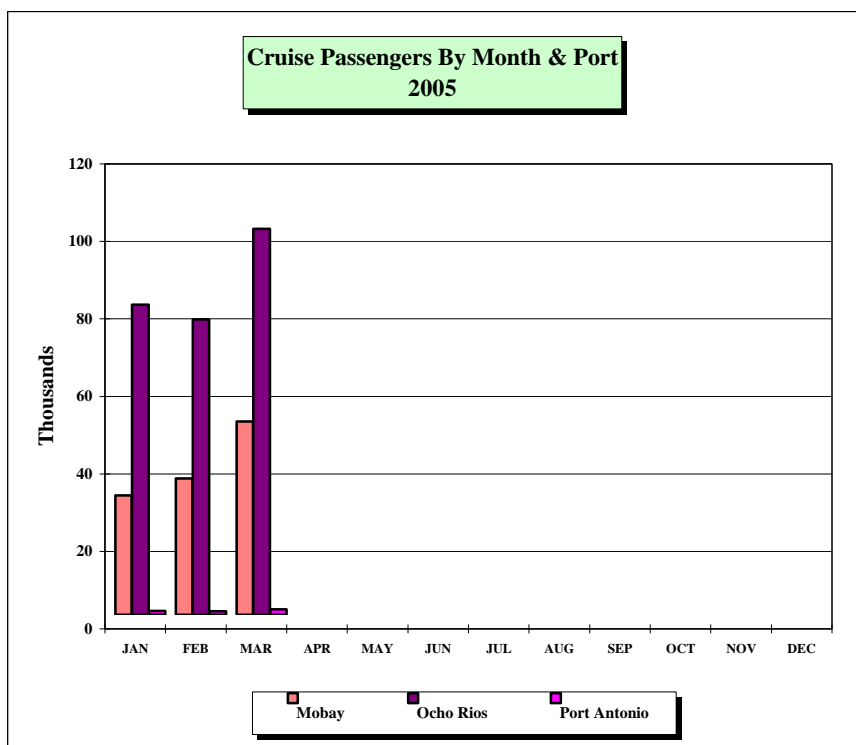


FIG. 4a

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MARCH 2004			JANUARY - MARCH 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
U.S.A.						
<u>NORTHEAST (NEW YORK)</u>						
Connecticut	3,085	209	3,294	7,518	232	7,750
Delaware	629	9	638	1,395	10	1,405
Maine	506	10	516	1,224	15	1,239
Maryland	4,168	167	4,335	9,681	174	9,855
Massachusetts	3,586	270	3,856	10,112	341	10,453
New Hamshire	615	28	643	1,772	37	1,809
New Jersey	7,428	223	7,651	17,255	238	17,493
New York	17,152	617	17,769	44,033	793	44,826
Pennsylvania	6,561	570	7,131	15,496	593	16,089
Rhode Island	387	30	417	1,278	43	1,321
Vermont	318	11	329	779	19	798
Virginia	2,926	203	3,129	6,337	207	6,544
Washington D.C.	634	16	650	1,370	17	1,387
West Virginia	275	12	287	589	15	604
Total	48,270	2,375	50,645	118,839	2,734	121,573
<u>MIDWEST (CHICAGO)</u>						
Illinois	4,232	2,075	6,307	9,553	5,453	15,006
Indiana	1,389	354	1,743	3,523	844	4,367
Iowa	890	353	1,243	2,436	1,187	3,623
Kansas	594	108	702	1,510	204	1,714
Kentucky	440	75	515	1,211	99	1,310
Michigan	2,912	1,381	4,293	6,899	3,712	10,611
Minnesota	2,137	2,986	5,123	5,226	8,319	13,545
Missouri	907	1,555	2,462	2,340	3,752	6,092
Nebraska	427	32	459	1,288	53	1,341
North Dakota	186	72	258	629	243	872
Ohio	2,164	578	2,742	4,976	1,037	6,013
South Dakota	215	70	285	789	212	1,001
Wisconsin	1,856	3,489	5,345	4,342	9,749	14,091
Total	18,349	13,128	31,477	44,722	34,864	79,586

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MARCH 2004			JANUARY - MARCH 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>SOUTH (MIAMI)</u>						
Alabama	716	5	721	1,469	5	1,474
Arkansas	310	51	361	669	125	794
Florida	13,375	129	13,504	28,482	138	28,620
Georgia	3,230	6	3,236	7,289	14	7,303
Louisiana	455	8	463	1,039	23	1,062
Mississippi	296	0	296	555	2	557
North Carolina	2,130	14	2,144	5,181	20	5,201
Oklahoma	280	304	584	635	517	1,152
South Carolina	732	0	732	1,851	6	1,857
Tennessee	1,427	20	1,447	2,784	31	2,815
Texas	3,172	810	3,982	6,086	1,801	7,887
Total	26,123	1,347	27,470	56,040	2,682	58,722
<u>WEST (LOS ANGELES)</u>						
Alaska	36	2	38	129	3	132
Arizona	543	11	554	1,155	34	1,189
California	3,728	32	3,760	8,529	66	8,595
Colorado	814	47	861	1,830	71	1,901
Hawaii	18	2	20	45	3	48
Idaho	130	2	132	340	6	346
Montana	86	8	94	277	16	293
Nevada	307	1	308	676	9	685
New Mexico	117	10	127	231	13	244
Oregon	282	1	283	629	5	634
Utah	129	1	130	446	3	449
Washington	465	3	468	1,229	13	1,242
Wyoming	68	0	68	133	2	135
Total	6,723	120	6,843	15,649	244	15,893
TOTAL U.S.A.	99,465	16,970	116,435	235,250	40,524	275,774

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MARCH 2004			JANUARY - MARCH 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CANADA (TORONTO)</u>						
Alberta	887	28	915	2,889	499	3,388
British Columbia	452	13	465	1,098	490	1,588
Manitoba	339	8	347	1,246	45	1,291
New Brunswick	239	11	250	472	34	506
Newfoundland	46	17	63	163	21	184
Nova Scotia	359	3	362	887	7	894
Ontario	5,744	3,211	8,955	16,857	10,996	27,853
P.E. Island	22	0	22	72	6	78
Quebec	943	535	1,478	3,441	3,684	7,125
Saskatchewan	125	3	128	688	53	741
Other Canada	23	0	23	69	11	80
Total	9,179	3,829	13,008	27,882	15,846	43,728
<u>LONDON OFFICE</u>						
<u>Northern Europe</u>						
U.K.	8,708	4,038	12,746	23,348	11,808	35,156
Denmark	47	2	49	171	7	178
Finland	39	0	39	117	2	119
Norway	75	0	75	250	0	250
Sweden	168	1	169	401	8	409
<u>Southern Europe</u>						
Greece	34	8	42	72	13	85
Italy	240	1,978	2,218	1,176	6,871	8,047
Portugal	20	6	26	53	16	69
Spain	138	11	149	294	33	327
<u>Western Europe</u>						
Austria	158	13	171	765	302	1,067
Belgium	84	232	316	530	659	1,189
France	188	41	229	1,130	143	1,273
Germany	2,074	116	2,190	6,301	152	6,453
Luxemburg	3	2	5	22	11	33
Netherlands	164	277	441	640	969	1,609
Switzerland	132	166	298	355	847	1,202
<u>Central/East Europe</u>						
Czechoslovakia	60	3	63	124	5	129
Hungary	13	0	13	110	22	132
Poland	66	0	66	254	0	254
Russia	91	1	92	460	4	464
Other Europe	123	19	142	460	38	498
Total	12,625	6,914	19,539	37,033	21,910	58,943

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MARCH 2004			JANUARY - MARCH 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>OTHER COUNTRIES</u>						
<u>CENTRAL AMERICA</u>						
Mexico	135	0	135	371	2	373
Belize	48	0	48	135	0	135
Costa Rica	57	0	57	173	0	173
El Salvador	11	0	11	38	0	38
Guatemala	27	0	27	69	0	69
Honduras	15	0	15	45	0	45
Nicaragua	2	0	2	11	0	11
Panama	78	0	78	226	0	226
Total	373	0	373	1,068	2	1,070
<u>SOUTH AMERICA</u>						
Argentina	35	0	35	143	0	143
Bolivia	2	0	2	9	0	9
Brazil	74	1	75	241	2	243
Chile	18	0	18	95	0	95
Colombia	45	0	45	85	0	85
Ecuador	5	0	5	55	2	57
Guyana	121	0	121	392	0	392
Paraguay	1	0	1	1	0	1
Peru	21	0	21	74	0	74
Surinam	44	0	44	147	0	147
Uruguay	3	0	3	11	0	11
Venezuela	55	0	55	159	0	159
Other South America	1	0	1	7	0	7
Total	425	1	426	1,419	4	1,423
Total Latin America	798	1	799	2,487	6	2,493

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MARCH 2004			JANUARY - MARCH 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
CARIBBEAN						
Antigua	142	0	142	416	0	416
Bahamas	246	0	246	603	1	604
Barbados	518	1	519	1,190	1	1,191
Bermuda	125	0	125	376	0	376
British Virgin Is.	65	0	65	149	0	149
Cayman Is.	1,393	0	1,393	3,603	0	3,603
Dominica	32	0	32	108	0	108
Grenada	52	0	52	189	0	189
Monsterrat	7	0	7	19	0	19
St. Kitts/Nevis/Anguilla	73	0	73	183	0	183
St. Lucia	109	0	109	428	0	428
St. Vincent	41	0	41	133	0	133
Turks & Caicos Is.	106	15	121	201	15	216
Trinidad & Tobago	778	0	778	1,756	0	1,756
Comm. Caribbean	3,687	16	3,703	9,354	17	9,371
Aruba	27	1	28	93	1	94
Bonaire	5	0		16	0	16
Cuba	31	0	31	150	0	150
Curacao	92	0	92	257	0	257
Dominican Republic	143	0	143	391	0	391
Guadelope	18	0	18	25	0	25
Haiti	23	0	23	55	0	55
Puerto Rico	112	0	112	319	0	319
St. Maarten	50	0	50	120	0	120
All other Caribbean	25	0	25	128	0	128
Other Caribbean	526	1	527	1,554	1	1,555
TOTAL CARIBBEAN	4,213	17	4,230	10,908	18	10,926
OTHER COUNTRIES						
African Countries	81	0	81	182	2	184
Isreal	71	0	71	258	2	260
Saudi Arabia	2	0	2	2	0	2
Turkey	15	5	20	38	6	44
Other Middle East	25	1	26	56	4	60
India & Pakistan	61	4	65	127	4	131
Japan	468	2	470	1,318	2	1,320
China	39	0	39	198	0	198
Taiwan	10	0	10	23	0	23
Korea	14	0	14	43	1	44
Philippines	65	0	65	207	0	207
Singapore	34	4	38	62	4	66
Other Asia	24	0	24	92	0	92
Australia	148	1	149	412	1	413
New Zealand	17	0	17	56	0	56
All Other Ctries	1	0	1	5	0	5
Total	1,075	17	1,092	3,079	26	3,105
GRAND TOTAL	127,355	27,748	155,103	316,639	78,330	394,969

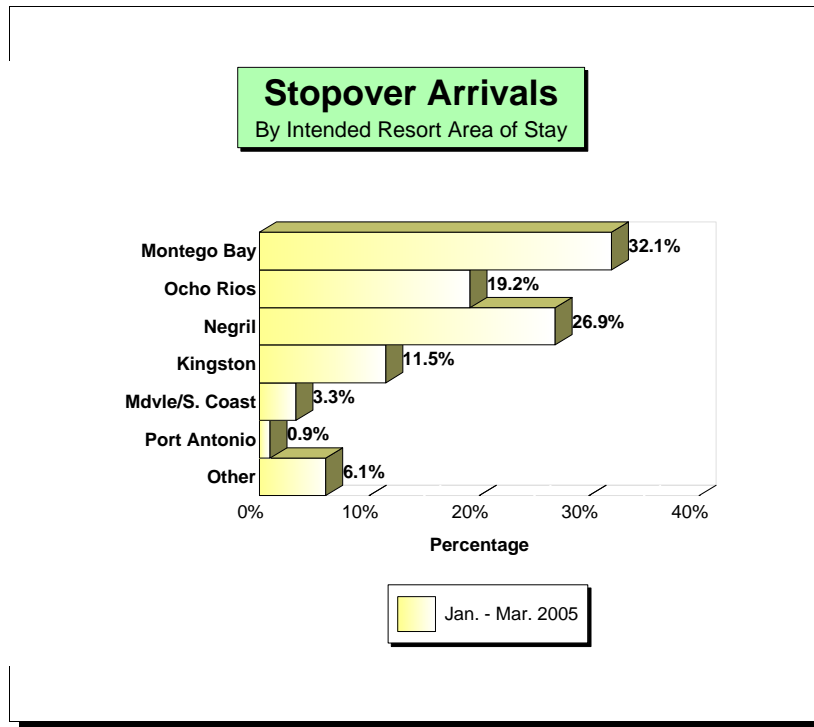


Fig. 5

STOPOVER ARRIVALS BY INTENDED AREA OF STAY

Area	MARCH		JAN.-MAR.		JAN.-MAR.		%Change 2005/04
	2005	%Share	2005	%Share	2003	%Share	
Montego Bay	49,294	31.8%	126,617	32.1%	119,342	32.6%	6.1%
Ocho Rios	28,788	18.6%	75,748	19.2%	83,731	22.9%	-9.5%
Negril	41,529	26.8%	106,318	26.9%	86,015	23.5%	23.6%
Kingston	18,682	12.0%	45,509	11.5%	41,630	11.4%	9.3%
Mdvle/S. Coast	5,262	3.4%	13,141	3.3%	11,504	3.1%	14.2%
Port Antonio	1,497	1.0%	3,733	0.9%	3,544	1.0%	5.3%
Other	10,051	6.5%	23,903	6.1%	20,319	5.6%	17.6%
Total	155,103	100.0%	394,969	100.0%	366,085	100.0%	7.9%