

JAMAICA

TOURIST BOARD

IN MAY 2004.....

- Stopover arrivals were up by 10%
- US Market increased by 8%
- Canada increased by 30%
- Europe increased by 17%
- Cruise Passenger arrivals up by .1%.

TOURIST (Stopovers)

Stopover arrivals in May 2004 were **111,759**, an increase of **9.5%** over the **102,021** recorded for May 2003. Cumulatively, stopovers for the January to May period grew by the same level of **9.5%** with **608,945** compared to **556,244** in 2003.

United States

Stopover arrivals from the United States market increased by **7.6%** in May with a total of **80,611** visitors compared to the **74,917** visitors who came in May 2003. All US Market regions recorded increases. The Northeast was up **11%**, the Midwest up **2%**, the South up **5%** and the West up **20%**.

For the January to May period the US market increased by approximately **9%**. Total visitors was **433,832** compared to **398,801** for the corresponding period in 2003. The Northeast increased by **13%**, the Midwest by **7%**, the South by **3%** and the West increased by **12%**.

Canada

During May, the Canadian market increased by **30%** with a total of **6,859** stopovers compared to **5,276** in May 2003. The leading province, Ontario increased by **35%**, and the second most important visitor-producing province, Quebec increased by **2%**. For the other provinces, Alberta increased by **21%**, British Columbia by **16%**, and Nova Scotia by **36%**.

Cumulatively, the Canadian market increased by **12%** in the January to May period, with a total of **52,582** stopovers compared to **47,087** in 2003. The main provinces

Ontario and Quebec recorded increases of **9%** and **12%** respectively. The other notable increases were Alberta up **72%**, Nova Scotia up **26%**, British Columbia up **24%** and New Brunswick up **22%**.

Europe

The European market increased by **17%** in May 2004. The market provided a total of **19,103** stopover visitors compared to the **16,282** recorded in May 2003. The United Kingdom and Germany increased by **12%** and **4%** respectively. The other countries which showed notable increases were: Spain (**31%**), and Italy (**49%**).

Cumulatively, for the January to May period, the European market increased by **14%**. Total stopovers for the period was **95,737** compared to **83,991** in 2003. The United Kingdom with a total of **63,248** stopovers increased by **15%** and Germany with a total of **8,822** increased by **23%**.

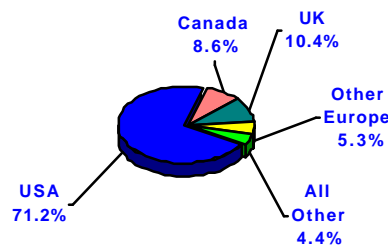
Latin America

The Latin American market grew by **1%** in May with a total of **981** stopovers compared to **968** in May 2003.

The main contributors to this increase were the countries located in Central American region though from small bases. The Central American region grew by **39%**, with **597** stopovers compared to **431** in May 2003. The South American Countries combined declined by **29%** with 384 stopovers compared to **537** in May 2003.

For the January to May period, the Latin American market declined by **4%** with a total of **4,570** visitors compared to **4,765** for the corresponding period in 2003.

STOPOVER ARRIVALS BY MARKET SHARE
January - May 2004



The Caribbean

Visitors to Jamaica from the Caribbean region decreased by **3%** in May with a total of **3,233** visitors, compared to **3,327** in May 2003.

The major Caribbean countries which provided visitors to Jamaica in May were: the Cayman Islands (**997**) and Trinidad & Tobago (**475**). Both of these countries declined by **14%**. Barbados (**362**), the Bahamas (**247**), increased by **7%** and **8%** respectively.

Cumulatively, during the January to May period, Caribbean stopover arrivals to Jamaica increased by **4%**, moving from **16,665** in 2003 to **17,369** 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 **5,268** visitors, followed by Trinidad and Tobago with **2,756**, Barbados with **2,063** and the Bahamas with **1,095** visitors.

Japan

The Japanese market increased by **21%** in May with a total of **303** stopovers compared to **250** in May 2003.

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

Other Countries

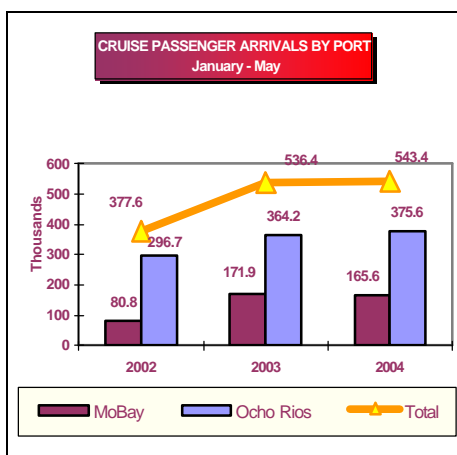
All the other countries, with a total of **972** stopovers in the January to May period recorded a decline of **22%** against the **1,251** who came for the same period in 2003.

Market Share

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

USA **71.2%**; Canada **8.6%**; UK **10.4%**; Continental Europe **5.3%**, the Caribbean **2.9%**; Latin America **0.8%**; and Other Countries **0.8%**.

Cruise Passengers



A total of **64,424** cruise passengers visited Jamaica in May 2004. This represents an increase of **0.1%** against the **64,350** recorded for May 2003. Cumulatively, a total of **543,435** cruise passengers visited Jamaica in the January to May period, a **1.3%** increase against the **536,402** recorded for the corresponding period in 2003.

A total of **48,372** cruise passengers visited the port of Ocho Rios in May, an increase of **2%** over the **47,443** recorded for May 2003. For the January to May period cruise passenger arrivals to the port of Ocho Rios was **375,577**, an increase of **3%** against the **364,180** recorded for the corresponding period in 2003.

Montego Bay recorded a total of **16,052** cruise passengers for the month which was down **5%** against the **16,907** recorded for 2003. Cumulatively, for the January to May period, cruise passenger arrivals to Montego Bay was **165,583**, a decline of **4%** against the **171,899** recorded for the same period in 2003.

Length of Stay

The average length of stay of stopovers in May was **8.7** nights against **9.2** for May 2003. The average length of stay in hotels was **6.3** nights compared to **5.9** nights in May 2003.

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

First and Repeat Visitors

Approximately **58%** or **61,937** of the **105,842** Foreign Nationals who visited Jamaica in May were first-time visitors and the other **42%** or **43,905** were repeat guests.

Cumulatively, in the January to May period, some **56%** of the **579,927** Foreign Nationals who visited the island were first-time guests and **44%** were repeat guests.

TABLE 1

TOURIST ARRIVALS

January - May
2004

Month	Foreign Nationals	<----- Stopovers ----->				Total Stopover Arrivals			
		+/- 2004/03	+/- 2004/02	Non-Resident Jamaicans	+/- 2004/03	+/- 2004/02	+/- 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%
Jan.-May	579,927	10.1%	18.1%	29,018	-1.2%	-1.2%	608,945	9.5%	17.0%

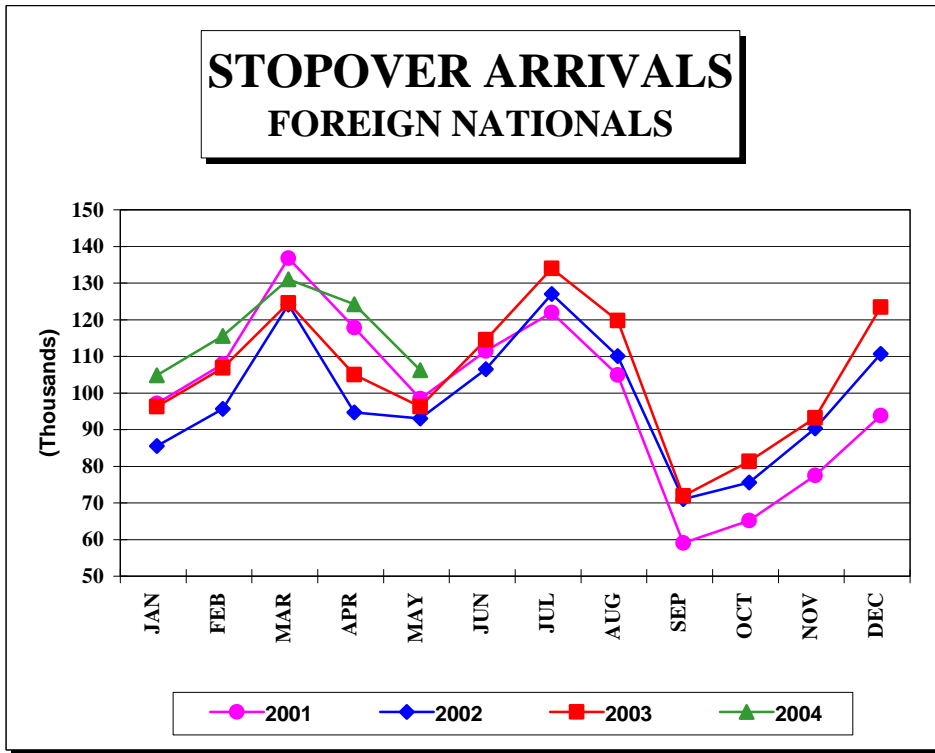


FIG. 1

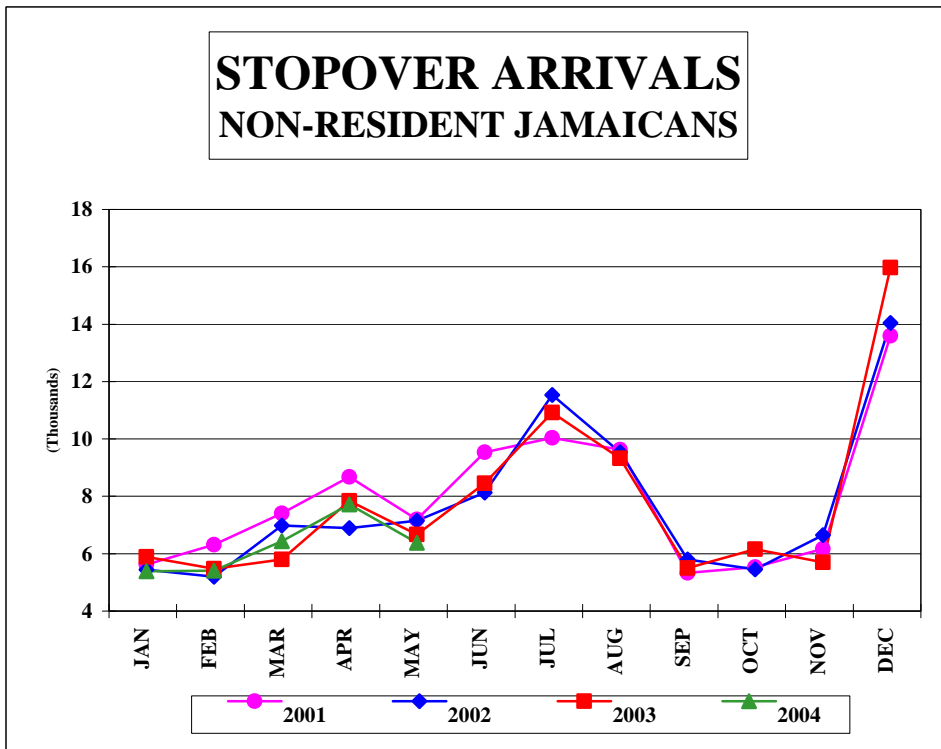


FIG. 1a

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
Jan.-May	323,161	10.0	256,766	10.2	579,927	55.7	44.3

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

	U.S.A.					Canada	U.K. Europe	Latin America	Caribbean	Asia	Other Countries	Total
	Northeast	Mid-West	South	West	Total							
January	31,236	23,510	14,108	4,542	73,396	12,336	18,959	766	2,980	521	392	109,350
February	37,653	27,054	14,984	4,183	83,874	12,529	19,008	841	2,822	699	356	120,129
March	42,908	29,393	20,789	5,495	98,585	11,239	21,009	1,209	3,585	686	293	136,606
April	47,843	20,524	22,329	6,670	97,366	9,619	17,658	773	4,749	611	325	131,101
Jan.-Apr.	159,640	100,481	72,210	20,890	353,221	45,723	76,634	3,589	14,136	2,517	1,366	497,186
May	33,313	14,271	26,608	6,419	80,611	6,859	19,103	981	3,233	570	402	111,759
Jan. - May	192,953	114,752	98,818	27,309	433,832	52,582	95,737	4,570	17,369	3,087	1,768	608,945
+/- %	12.5%	7.1%	3.2%	11.8%	8.8%	11.7%	14.0%	-4.1%	4.2%	6.7%	-13.5%	9.5%

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MAY</u>			<u>% Change</u>			<u>JANUARY - MAY</u>			<u>% Change</u>				
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>
U.S.A.														
<u>NORTHEAST (NEW YORK)</u>														
Connecticut	1,688	1,475	1,465	1,601	9.3	8.5	-5.2	11,129	9,574	10,073	11,641	15.6	21.6	4.6
Delaware	479	415	405	505	24.7	21.7	5.4	2,599	1,952	2,178	2,444	12.2	25.2	-6.0
Maine	243	179	160	182	13.7	1.7	-25.1	1,716	1,395	1,342	1,994	48.6	42.9	16.2
Maryland	2,981	2,844	2,874	3,254	13.2	14.4	9.2	14,416	13,156	13,943	15,761	13.0	19.8	9.3
Massachusetts	2,618	2,216	1,969	2,611	32.6	17.8	-0.3	18,035	14,412	14,493	17,738	22.4	23.1	-1.6
New Hampshire	314	284	267	333	24.7	17.3	6.1	3,123	2,375	2,361	2,985	26.4	25.7	-4.4
New Jersey	5,112	4,444	4,570	5,055	10.6	13.7	-1.1	25,982	22,801	25,187	27,964	11.0	22.6	7.6
New York	13,115	11,832	11,606	12,040	3.7	1.8	-8.2	72,164	61,745	64,192	70,508	9.8	14.2	-2.3
Pennsylvania	4,566	4,373	4,191	4,803	14.6	9.8	5.2	23,930	21,769	23,614	25,809	9.3	18.6	7.9
Rhode Island	263	205	275	331	20.4	61.5	25.9	1,766	1,499	1,716	2,094	22.0	39.7	18.6
Vermont	130	68	91	118	29.7	73.5	-9.2	1,193	782	898	1,252	39.4	60.1	4.9
Virginia	1,776	1,694	1,717	1,822	6.1	7.6	2.6	9,401	8,326	8,743	9,700	10.9	16.5	3.2
Washington D.C.	477	472	410	483	17.8	2.3	1.3	2,314	1,974	2,044	2,037	-0.3	3.2	-12.0
West Virginia	177	140	120	175	45.8	25.0	-1.1	918	703	698	1,026	47.0	45.9	11.8
Total	33,939	30,641	30,120	33,313	10.6	8.7	-1.8	188,686	162,463	171,482	192,953	12.5	18.8	2.3
<u>MIDWEST (CHICAGO)</u>														
Illinois	4,377	3,731	3,606	3,835	6.4	2.8	-12.4	25,853	23,169	24,937	25,533	2.4	10.2	-1.2
Indiana	1,127	926	1,050	1,062	1.1	14.7	-5.8	6,250	5,929	6,479	6,509	0.5	9.8	4.1
Iowa	484	361	416	425	2.2	17.7	-12.2	4,137	3,976	4,385	4,851	10.6	22.0	17.3
Kansas	426	427	292	491	68.2	15.0	15.3	2,448	1,727	1,791	2,411	34.6	39.6	-1.5
Kentucky	370	536	478	564	18.0	5.2	52.4	2,478	2,480	2,447	2,516	2.8	1.5	1.5
Michigan	1,703	1,365	2,152	1,875	-12.9	37.4	10.1	17,678	13,564	15,961	16,599	4.0	22.4	-6.1
Minnesota	519	557	833	800	-4.0	43.6	54.1	13,153	11,524	13,352	13,707	2.7	18.9	4.2
Missouri	1,715	1,441	1,946	1,802	-7.4	25.1	5.1	8,366	7,344	8,777	10,058	14.6	37.0	20.2
Nebraska	322	429	316	454	43.7	5.8	41.0	2,345	1,791	2,033	2,299	13.1	28.4	-2.0
North Dakota	59	50	64	55	-14.1	10.0	-6.8	670	609	699	1,095	56.7	79.8	63.4
Ohio	1,395	1,436	1,497	1,470	-1.8	2.4	5.4	9,808	9,581	8,683	9,262	6.7	-3.3	-5.6
South Dakota	51	65	121	73	-39.7	12.3	43.1	757	641	1,064	1,121	5.4	74.9	48.1
Wisconsin	1,204	1,166	1,245	1,365	9.6	17.1	13.4	17,786	15,440	16,487	18,791	14.0	21.7	5.7
Total	13,752	12,490	14,016	14,271	1.8	14.3	3.8	111,729	97,775	107,095	114,752	7.1	17.4	2.7

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MAY</u>			<u>% C h a n g e</u>			<u>JANUARY - MAY</u>			<u>% C h a n g e</u>				
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>
<u>SOUTH (MIAMI)</u>														
Alabama	738	767	981	1,026	4.6	33.8	39.0	2,926	2,582	3,001	2,997	-0.1	16.1	2.4
Arkansas	268	259	318	375	17.9	44.8	39.9	950	981	1,142	1,290	13.0	31.5	35.8
Florida	11,379	10,914	10,939	11,143	1.9	2.1	-2.1	46,380	44,040	43,782	45,659	4.3	3.7	-1.6
Georgia	4,128	4,648	4,371	4,354	-0.4	-6.3	5.5	16,321	16,585	16,261	16,132	-0.8	-2.7	-1.2
Louisiana	674	802	778	719	-7.6	-10.3	6.7	2,189	2,216	2,162	2,077	-3.9	-6.3	-5.1
Mississippi	423	379	404	609	50.7	60.7	44.0	1,131	1,166	1,125	1,335	18.7	14.5	18.0
North Carolina	1,779	1,455	1,646	1,818	10.4	24.9	2.2	7,390	6,717	7,180	7,855	9.4	16.9	6.3
Oklahoma	488	405	523	579	10.7	43.0	18.6	1,441	1,261	1,363	1,602	17.5	27.0	11.2
South Carolina	811	911	875	803	-8.2	-11.9	-1.0	3,398	3,030	3,226	3,225	-0.0	6.4	-5.1
Tennessee	1,044	1,171	1,138	1,382	21.4	18.0	32.4	4,544	4,776	5,054	5,090	0.7	6.6	12.0
Texas	3,358	3,997	3,455	3,800	10.0	-4.9	13.2	10,004	12,349	11,500	11,556	0.5	-6.4	15.5
Total	25,090	25,708	25,428	26,608	4.6	3.5	6.1	96,674	95,703	95,796	98,818	3.2	3.3	2.2
<u>WEST (LOS ANGELES)</u>														
Alaska	38	16	24	28	16.7	75.0	-26.3	171	125	157	178	13.4	42.4	4.1
Arizona	792	413	484	450	-7.0	9.0	-43.2	3,068	1,853	1,746	1,962	12.4	5.9	-36.0
California	3,807	3,403	3,184	3,862	21.3	13.5	1.4	15,817	14,063	13,607	15,700	15.4	11.6	-0.7
Colorado	610	650	571	834	46.1	28.3	36.7	3,447	3,294	2,833	3,598	27.0	9.2	4.4
Hawaii	27	17	15	15	0.0	-11.8	-44.4	96	68	99	121	22.2	77.9	26.0
Idaho	87	90	80	97	21.2	7.8	11.5	649	465	552	403	-27.0	-13.3	-37.9
Montana	53	27	35	49	40.0	81.5	-7.5	369	344	476	451	-5.3	31.1	22.2
Nevada	183	169	216	238	10.2	40.8	30.1	783	732	955	941	-1.5	28.6	20.2
New Mexico	93	104	83	136	63.9	30.8	46.2	565	419	360	447	24.2	6.7	-20.9
Oregon	319	268	190	174	-8.4	-35.1	-45.5	1,103	1,011	970	974	0.4	-3.7	-11.7
Utah	112	115	127	133	4.7	15.7	18.8	468	544	708	603	-14.8	10.8	28.8
Washington	359	344	313	361	15.3	4.9	0.6	2,056	1,737	1,774	1,701	-4.1	-2.1	-17.3
Wyoming	44	33	31	42	35.5	27.3	-4.5	204	174	191	230	20.4	32.2	12.7
Total	6,524	5,649	5,353	6,419	19.9	13.6	-1.6	28,796	24,829	24,428	27,309	11.8	10.0	-5.2
TOTAL U.S.A.	79,305	74,488	74,917	80,611	7.6	8.2	1.6	425,885	380,770	398,801	433,832	8.8	13.9	1.9

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MAY</u>			% C h a n g e				<u>JANUARY - MAY</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	296	244	248	300	21.0	23.0	1.4	2,473	1,964	2,098	3,615	72.3	84.1	46.2
British Columbia	207	199	217	252	16.1	26.6	21.7	1,677	1,327	1,369	1,697	24.0	27.9	1.2
Manitoba	94	85	68	55	-19.1	-35.3	-41.5	1,948	985	1,993	1,711	-14.1	73.7	-12.2
New Brunswick	91	47	29	56	93.1	19.1	-38.5	952	653	623	759	21.8	16.2	-20.3
Newfoundland	59	60	59	76	28.8	26.7	28.8	312	307	310	311	0.3	1.3	-0.3
Nova Scotia	106	96	94	128	36.2	33.3	20.8	1,612	784	1,068	1,341	25.6	71.0	-16.8
Ontario	5,243	4,569	4,108	5,550	35.1	21.5	5.9	41,317	35,089	32,742	35,542	8.6	1.3	-14.0
P.E. Island	8	8	14	9	-35.7	12.5	12.5	101	94	119	143	20.2	52.1	41.6
Quebec	558	517	384	392	2.1	-24.2	-29.7	8,144	6,310	5,861	6,556	11.9	3.9	-19.5
Saskatchewan	50	17	46	35	-23.9	105.9	-30.0	825	461	804	795	-1.1	72.5	-3.6
Other Canada	14	29	9	6	-33.3	-79.3	-57.1	219	160	100	112	12.0	-30.0	-48.9
Total	6,726	5,871	5,276	6,859	30.0	16.8	2.0	59,580	48,134	47,087	52,582	11.7	9.2	-11.7
<u>LONDON OFFICE</u>														
<u>Northern Europe</u>														
U.K.	9,792	8,567	12,058	13,506	12.0	57.7	37.9	49,280	46,139	55,037	63,248	14.9	37.1	28.3
Denmark	52	43	28	31	10.7	-27.9	-40.4	369	242	176	288	63.6	19.0	-22.0
Finland	22	74	12	13	8.3	-82.4	-40.9	184	214	270	226	-16.3	5.6	22.8
Norway	38	133	44	36	-18.2	-72.9	-5.3	379	448	374	307	-17.9	-31.5	-19.0
Sweden	59	75	57	52	-8.8	-30.7	-11.9	681	549	450	531	18.0	-3.3	-22.0
<u>Southern Europe</u>														
Greece	8	30	10	10	0.0	-66.7	25.0	93	93	123	71	-42.3	-23.7	-23.7
Italy	624	622	637	951	49.3	52.9	52.4	6,068	5,142	11,713	10,497	-10.4	104.1	73.0
Portugal	7	252	34	171	402.9	-32.1	2342.9	112	404	195	309	58.5	-23.5	175.9
Spain	113	936	1,072	1,402	30.8	49.8	1140.7	717	1,618	1,664	1,809	8.7	11.8	152.3
<u>Western Europe</u>														
Austria	128	82	131	117	-10.7	42.7	-8.6	1,127	775	901	1,441	59.9	85.9	27.9
Belgium	63	114	198	748	277.8	556.1	1087.3	480	503	681	1,396	105.0	177.5	190.8
France	155	230	213	177	-16.9	-23.0	14.2	1,305	1,278	1,202	1,301	8.2	1.8	-0.3
Germany	1,661	1,157	1,163	1,210	4.0	4.6	-27.2	9,919	5,937	7,165	8,822	23.1	48.6	-11.1
Luxemburg	8	5	5	9	80.0	80.0	12.5	44	24	31	52	67.7	116.7	18.2
Netherlands	218	180	251	292	16.3	62.2	33.9	1,077	811	1,320	1,423	7.8	75.5	32.1
Switzerland	154	115	135	119	-11.9	3.5	-22.7	1,170	761	949	2,013	112.1	164.5	72.1
<u>Central/East Europe</u>														
Czechoslovakia	16	13	14	38	171.4	192.3	137.5	157	124	177	218	23.2	75.8	38.9
Hungary	7	16	4	5	25.0	-68.8	-28.6	88	109	75	95	26.7	-12.8	8.0
Poland	11	40	37	39	5.4	-2.5	254.5	194	290	340	418	22.9	44.1	115.5
Russia	72	67	132	94	-28.8	40.3	30.6	482	563	639	547	-14.4	-2.8	13.5
Other Europe	38	110	47	83	76.6	-24.5	118.4	400	441	509	725	42.4	64.4	81.3
Total	13,246	12,861	16,282	19,103	17.3	48.5	44.2	74,326	66,465	83,991	95,737	14.0	44.0	28.8

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MAY</u>			<u>% C h a n g e</u>			<u>JANUARY - MAY</u>			<u>% C h a n g e</u>				
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>
<u>LATIN AMERICA</u>														
<u>CENTRAL AMERICA</u>														
Mexico	220	152	159	127	-20.1	-16.4	-42.3	1,077	750	751	896	19.3	19.5	-16.8
Belize	36	30	107	43	-59.8	43.3	19.4	181	194	554	203	-63.4	4.6	12.2
Costa Rica	50	50	46	95	106.5	90.0	90.0	266	291	217	280	29.0	-3.8	5.3
El Salvador	9	13	6	78	1200.0	500.0	766.7	53	90	58	106	82.8	17.8	100.0
Guatemala	32	45	32	117	265.6	160.0	265.6	135	174	135	225	66.7	29.3	66.7
Honduras	6	22	11	45	309.1	104.5	650.0	92	69	67	135	101.5	95.7	46.7
Nicaragua	3	11	3	13	333.3	18.2	333.3	18	37	14	34	142.9	-8.1	88.9
Panama	110	83	67	79	17.9	-4.8	-28.2	566	418	430	443	3.0	6.0	-21.7
Total	466	406	431	597	38.5	47.0	28.1	2,388	2,023	2,226	2,322	4.3	14.8	-2.8
<u>SOUTH AMERICA</u>														
Argentina	84	45	139	41	-70.5	-8.9	-51.2	707	219	334	231	-30.8	5.5	-67.3
Bolivia	4	4	5	5	0.0	25.0	25.0	29	23	27	20	-25.9	-13.0	-31.0
Brazil	64	60	72	55	-23.6	-8.3	-14.1	436	385	317	390	23.0	1.3	-10.6
Chile	45	52	43	37	-14.0	-28.8	-17.8	311	324	173	226	30.6	-30.2	-27.3
Colombia	267	46	29	22	-24.1	-52.2	-91.8	813	246	423	130	-69.3	-47.2	-84.0
Ecuador	40	22	9	9	0.0	-59.1	-77.5	123	86	23	43	87.0	-50.0	-65.0
Guyana	130	166	144	107	-25.7	-35.5	-17.7	642	571	666	648	-2.7	13.5	0.9
Paraguay	0	0	0	0	-	ERR	ERR	7	9	7	9	28.6	0.0	28.6
Peru	40	58	23	31	34.8	-46.6	-22.5	141	164	146	135	-7.5	-17.7	-4.3
Surinam	25	30	17	12	-29.4	-60.0	-52.0	139	74	121	91	-24.8	23.0	-34.5
Uruguay	9	1	6	4	-33.3	300.0	-55.6	48	32	26	47	80.8	46.9	-2.1
Venezuela	68	319	50	61	22.0	-80.9	-10.3	642	617	272	277	1.8	-55.1	-56.9
Other South America	0	8	0	0	-	-	-	2	8	4	1	-	-	-
Total	776	811	537	384	-28.5	-52.7	-50.5	4,040	2,758	2,539	2,248	-11.5	-18.5	-44.4
Total Latin America	1,242	1,217	968	981	1.3	-19.4	-21.0	6,428	4,781	4,765	4,570	-4.1	-4.4	-28.9

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

	<u>MAY</u>							<u>JANUARY - MAY</u>						
	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>% Change</u>			<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>% Change</u>		
					<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>					<u>2004/03</u>	<u>2004/02</u>	<u>2004/01</u>
<u>CARIBBEAN</u>														
Antigua	91	145	136	92	-32.4	-36.6	1.1	526	532	577	685	18.7	28.8	30.2
Bahamas	507	328	232	247	6.5	-24.7	-51.3	2,459	1,488	1,055	1,095	3.8	-26.4	-55.5
Barbados	317	415	336	362	7.7	-12.8	14.2	1,601	1,791	1,949	2,063	5.8	15.2	28.9
Bermuda	99	198	111	96	-13.5	-51.5	-3.0	621	729	902	783	-13.2	7.4	26.1
British Virgin Is.	31	29	25	90	260.0	210.3	190.3	160	136	158	310	96.2	127.9	93.8
Cayman Is.	866	1,074	1,146	997	-13.0	-7.2	15.1	4,757	4,168	4,735	5,268	11.3	26.4	10.7
Dominica	24	31	22	18	-18.2	-41.9	-25.0	158	103	131	101	-22.9	-1.9	-36.1
Grenada	44	52	50	33	-34.0	-36.5	-25.0	218	205	229	216	-5.7	5.4	-0.9
Monsterrat	11	5	5	19	280.0	280.0	72.7	43	22	41	48	17.1	118.2	11.6
St. Kitts/Nevis/Anguilla	44	60	58	78	34.5	30.0	77.3	235	225	267	383	43.4	70.2	63.0
St. Lucia	80	152	90	103	14.4	-32.2	28.8	510	513	645	641	-0.6	25.0	25.7
St. Vincent	35	56	36	36	0.0	-35.7	2.9	186	213	182	200	9.9	-6.1	7.5
Turks & Caicos Is.	59	96	87	78	-10.3	-18.8	32.2	359	326	368	403	9.5	23.6	12.3
Trinidad & Tobago	563	648	550	475	-13.6	-26.7	-15.6	2,791	2,724	2,817	2,756	-2.2	1.2	-1.3
Comm. Caribbean	2,771	3,289	2,884	2,724	-5.5	-17.2	-1.7	14,624	13,175	14,056	14,952	6.4	13.5	2.2
Aruba	17	16	11	22	100.0	37.5	29.4	86	115	193	119	-38.3	3.5	38.4
Bonaire	0	0	8	6	-25.0	-	-	0	0	16	20	25.0	-	-
Cuba	51	46	47	21	-55.3	-54.3	-58.8	284	256	253	179	-29.2	-30.1	-37.0
Curacao	32	129	64	83	29.7	-35.7	159.4	166	378	585	370	-36.8	-2.1	122.9
Dominican Republic	82	75	73	62	-15.1	-17.3	-24.4	335	395	307	403	31.3	2.0	20.3
Guadelope	4	14	6	4	-33.3	-71.4	0.0	28	38	33	79	139.4	107.9	182.1
Haiti	68	66	56	38	-32.1	-42.4	-44.1	202	262	316	146	-53.8	-44.3	-27.7
Puerto Rico	127	167	95	95	0.0	-43.1	-25.2	645	728	497	599	20.5	-17.7	-7.1
St. Maarten	41	34	53	52	-1.9	52.9	26.8	182	146	211	208	-1.4	42.5	14.3
All other Caribbean	52	77	30	126	320.0	63.6	142.3	197	194	198	294	48.5	51.5	49.2
Other Caribbean	474	624	443	509	14.9	-18.4	7.4	2,125	2,512	2,609	2,417	-7.4	-3.8	13.7
TOTAL CARIBBEAN	3,245	3,913	3,327	3,233	-2.8	-17.4	-0.4	16,749	15,687	16,665	17,369	4.2	10.7	3.7
<u>OTHER COUNTRIES</u>														
African Countries	115	117	119	113	-5.0	-3.4	-1.7	578	375	359	419	16.7	11.7	-27.5
Isreal	55	64	35	58	65.7	-9.4	5.5	400	280	297	372	25.3	32.9	-7.0
Saudi Arabia	1	0	1	9	800.0	-	800.0	14	5	10	13	30.0	160.0	-7.1
Turkey	2	7	7	18	157.1	157.1	800.0	98	56	61	89	45.9	58.9	-9.2
Other Middle East	18	17	29	27	-6.9	58.8	50.0	143	101	98	100	2.0	-1.0	-30.1
India & Pakistan	99	70	54	77	42.6	10.0	-22.2	359	242	218	268	22.9	10.7	-25.3
Japan	475	345	250	303	21.2	-12.2	-36.2	2,778	1,914	1,607	2,079	29.4	8.6	-25.2
China	26	43	22	63	186.4	46.5	142.3	213	215	231	204	-11.7	-5.1	-4.2
Taiwan	3	4	8	2	-75.0	-50.0	-33.3	32	28	37	15	-59.5	-46.4	-53.1
Korea	10	36	16	30	87.5	-16.7	200.0	119	111	78	109	39.7	-1.8	-8.4
Philippines	30	44	66	51	-22.7	15.9	70.0	227	286	575	257	-55.3	-10.1	13.2
Singapore	8	11	13	5	-61.5	-54.5	-37.5	62	33	44	48	9.1	45.5	-22.6
Other Asia	19	25	20	39	95.0	56.0	105.3	165	90	102	148	45.1	64.4	-10.3
Australia	122	126	589	133	-77.4	5.6	9.0	632	566	1,120	588	-47.5	3.9	-7.0
New Zealand	15	41	22	43	95.5	4.9	186.7	115	137	95	132	38.9	-3.6	14.8
All Other Ctries	4	14	0	1	-	-92.9	-75.0	27	34	3	14	366.7	-58.8	-48.1
Total	1,002	964	1,251	972	-22.3	0.8	-3.0	5,962	4,473	4,935	4,855	-1.6	8.5	-18.6
GRAND TOTAL	104,766	99,314	102,021	111,759	9.5	12.5	6.7	588,930	520,310	556,244	608,945	9.5	17.0	3.4

STOPOVER VISITORS BY MARKET SHARE

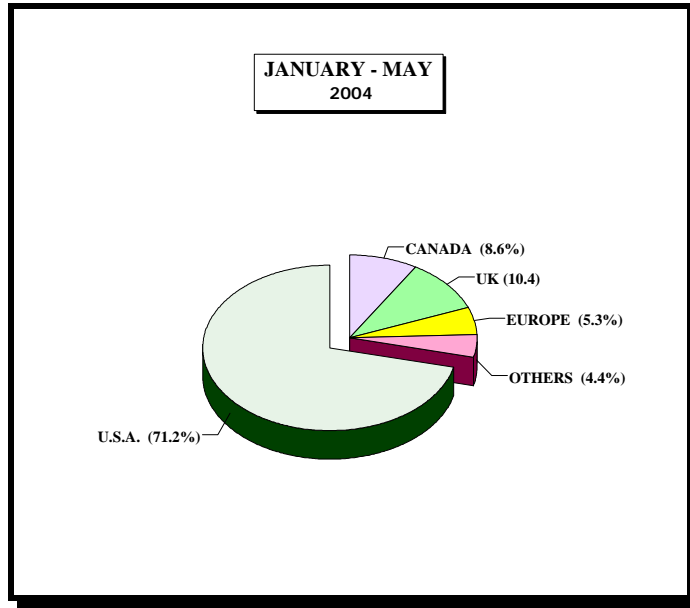


Fig. 2

Country	May 2004	% Share	Jan. - May 2004	% Share	Jan. - May 2003	% Share	%Change 2004/03
U.S.A	80,611	72.1%	433,832	71.2%	399,298	71.8%	8.6%
CANADA	6,859	6.1%	52,582	8.6%	47,087	8.5%	11.7%
U.K.	13,506	12.1%	63,248	10.4%	55,037	9.9%	14.9%
EUROPE	5,597	5.0%	32,489	5.3%	28,954	5.2%	12.2%
OTHERS	5,186	4.6%	26,794	4.4%	25,868	4.7%	3.6%
Total	111,759	100.0%	608,945	100.0%	556,244	100.0%	9.5%

TABLE 3

<u>AVERAGE LENGTH OF STAY (Nights)</u>				
<u>FOREIGN NATIONALS</u>				
	All Types of Accommodation		Hotel	
	2003	2004	2003	2004
January	10.1	9.8	6.6	6.7
February	8.8	8.9	6.3	6.5
March	8.5	8.6	6.1	6.2
April	8.9	8.7	6.2	6.1
May	9.2	8.7	5.9	6.3
Jan. - May	9.0	8.9	6.3	6.3

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

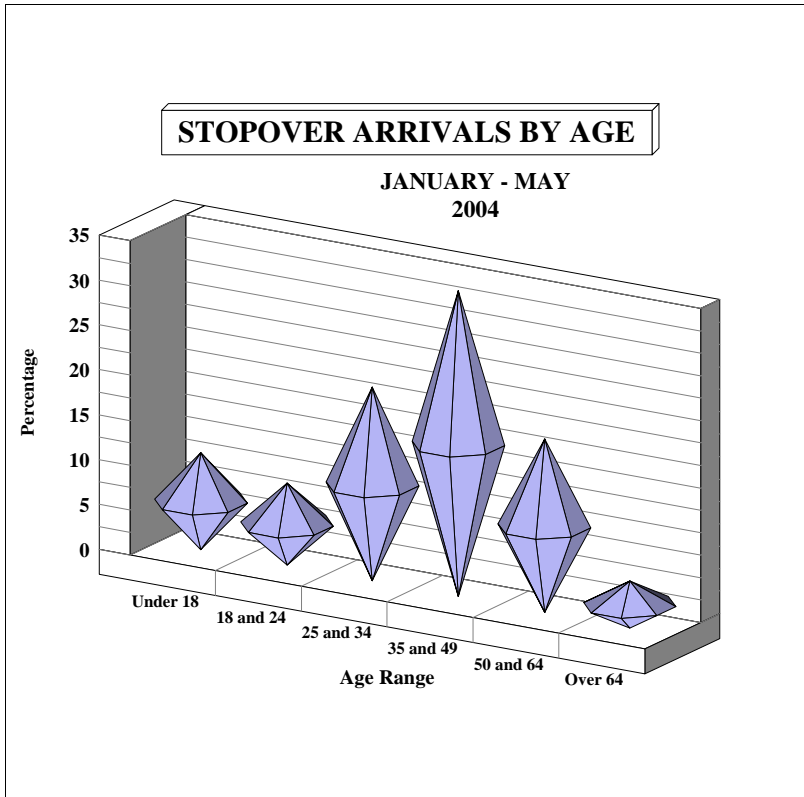


Fig. 3

AGE DISTRIBUTION OF STOPOVER ARRIVALS

Age	MAY		JAN. - MAY		JAN. - MAY		%Change 2004/03
	2004	% Share	2004	% Share	2003	% Share	
Under 18	9,247	8.3	65,653	10.8	57,477	10.3	14.2%
18 and 24	10,915	9.8	55,687	9.1	51,691	9.3	7.7%
25 and 34	31,455	28.1	131,391	21.6	123,833	22.3	6.1%
35 and 49	36,033	32.2	207,522	34.1	190,631	34.3	8.9%
50 and 64	18,807	16.8	117,244	19.3	105,516	19.0	11.1%
Over 64	5,302	4.7	31,448	5.2	27,096	4.9	16.1%
Total	111,759	100.0	608,945	100.0	556,244	100.0	9.5%

TABLE 4**CRUISE PASSENGER ARRIVALS BY MONTH AND PORT OF CALL
JANUARY - MAY 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%
Jan. - May	91	165,583	-10.8%	-3.7%	154	375,577	-3.1%	3.1%	250	543,435	263	536,402	-4.9%	1.3%

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

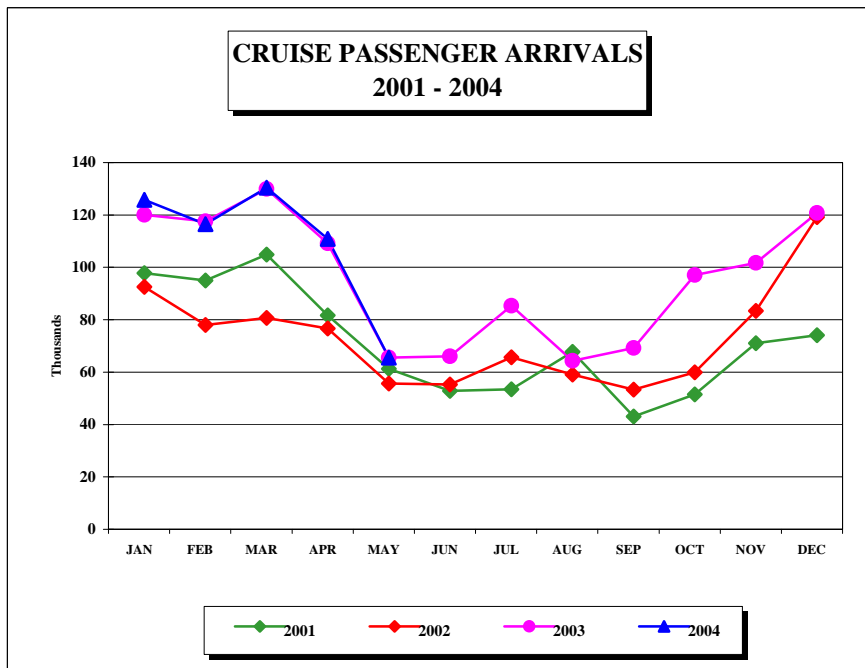


FIG. 4

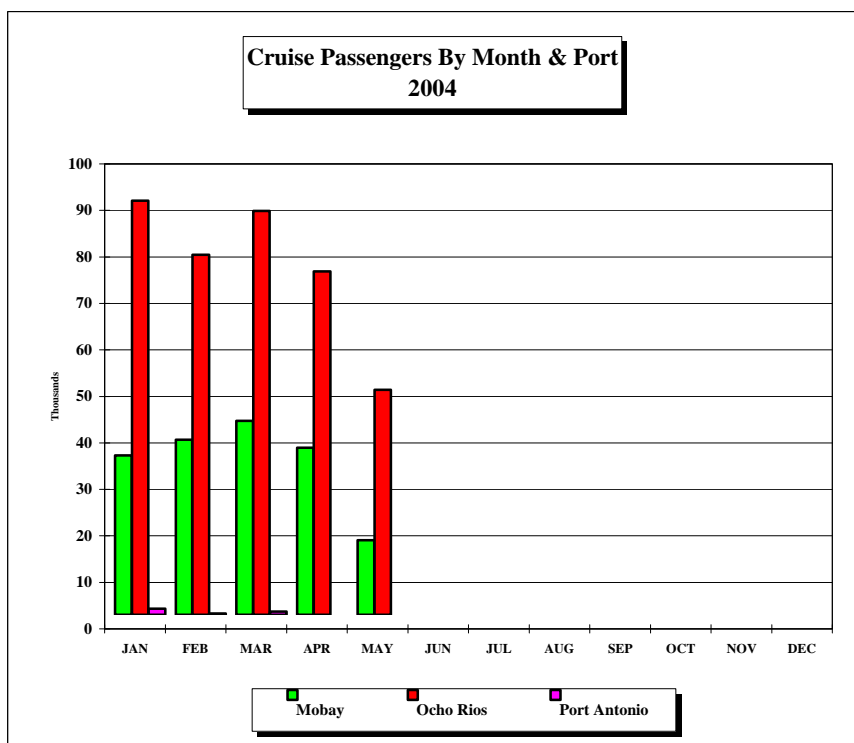


FIG. 4a

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	<u>MAY 2004</u>			<u>JANUARY - MAY 2004</u>		
	<u>SCHEDULED AIRLINES</u>	<u>CHARTERED AIRLINES</u>	<u>TOTAL STOPOVERS</u>	<u>SCHEDULED AIRLINES</u>	<u>CHARTERED AIRLINES</u>	<u>TOTAL STOPOVERS</u>
U.S.A.						
<u>NORTHEAST (NEW YORK)</u>						
Connecticut	1,601	0	1,601	11,457	184	11,641
Delaware	505	0	505	2,426	18	2,444
Maine	182	0	182	1,971	23	1,994
Maryland	3,252	2	3,254	15,443	318	15,761
Massachusetts	2,609	2	2,611	17,310	428	17,738
New Hampshire	333	0	333	2,913	72	2,985
New Jersey	5,055	0	5,055	27,635	329	27,964
New York	11,996	44	12,040	69,123	1,385	70,508
Pennsylvania	4,801	2	4,803	25,157	652	25,809
Rhode Island	331	0	331	2,069	25	2,094
Vermont	118	0	118	1,231	21	1,252
Virginia	1,822	0	1,822	9,420	280	9,700
Washington D.C.	483	0	483	1,992	44	2,036
West Virginia	175	0	175	959	68	1,027
Total	<u>33,263</u>	<u>50</u>	<u>33,313</u>	<u>189,106</u>	<u>3,847</u>	<u>192,953</u>
<u>MIDWEST (CHICAGO)</u>						
Illinois	2,709	1,126	3,835	14,530	11,003	25,533
Indiana	994	68	1,062	5,182	1,327	6,509
Iowa	380	45	425	3,240	1,611	4,851
Kansas	474	17	491	2,089	322	2,411
Kentucky	561	3	564	2,335	181	2,516
Michigan	1,431	444	1,875	11,997	4,602	16,599
Minnesota	799	1	800	8,405	5,302	13,707
Missouri	772	1,030	1,802	3,415	6,643	10,058
Nebraska	446	8	454	2,221	78	2,299
North Dakota	55	0	55	801	294	1,095
Ohio	1,432	38	1,470	8,236	1,026	9,262
South Dakota	70	3	73	970	151	1,121
Wisconsin	861	504	1,365	10,390	8,401	18,791
Total	<u>10,984</u>	<u>3,287</u>	<u>14,271</u>	<u>73,811</u>	<u>40,941</u>	<u>114,752</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	<u>MAY 2004</u>			<u>JANUARY - MAY 2004</u>		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>SOUTH (MIAMI)</u>						
Alabama	1,026	0	1,026	2,984	13	2,997
Arkansas	362	13	375	1,233	57	1,290
Florida	11,139	4	11,143	45,527	132	45,659
Georgia	4,354	0	4,354	16,087	45	16,132
Louisiana	717	2	719	2,061	16	2,077
Mississippi	608	1	609	1,316	19	1,335
North Carolina	1,815	3	1,818	7,678	177	7,855
Oklahoma	405	174	579	1,386	216	1,602
South Carolina	802	1	803	3,187	38	3,225
Tennessee	1,381	1	1,382	5,011	79	5,090
Texas	3,382	418	3,800	11,069	487	11,556
Total	<u>25,991</u>	<u>617</u>	<u>26,608</u>	<u>97,539</u>	<u>1,279</u>	<u>98,818</u>
<u>WEST (LOS ANGELES)</u>						
Alaska	28	0	28	163	12	175
Arizona	444	6	450	1,908	57	1,965
California	3,857	5	3,862	15,548	152	15,700
Colorado	558	276	834	2,450	1,148	3,598
Hawaii	15	0	15	117	4	121
Idaho	97	0	97	402	1	403
Montana	49	0	49	439	12	451
Nevada	237	1	238	921	20	941
New Mexico	131	5	136	432	15	447
Oregon	171	3	174	959	15	974
Utah	128	5	133	590	13	603
Washington	361	1	362	1,645	57	1,702
Wyoming	34	7	41	188	41	229
Total	<u>6,110</u>	<u>309</u>	<u>6,419</u>	<u>25,762</u>	<u>1,547</u>	<u>27,309</u>
TOTAL U.S.A.	<u>76,348</u>	<u>4,263</u>	<u>80,611</u>	<u>386,218</u>	<u>47,614</u>	<u>433,832</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MAY 2004			JANUARY - MAY 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CANADA (TORONTO)</u>						
Alberta	279	21	300	3,558	57	3,615
British Columbia	236	16	252	1,655	42	1,697
Manitoba	52	3	55	1,665	46	1,711
New Brunswick	56	0	56	730	29	759
Newfoundland	68	8	76	279	32	311
Nova Scotia	127	1	128	1,309	32	1,341
Ontario	3,758	1,792	5,550	23,065	12,477	35,542
P.E. Island	9	0	9	143	0	143
Quebec	346	46	392	4,568	1,988	6,556
Saskatchewan	34	1	35	781	12	793
Other Canada	6	0	6	97	17	114
Total	4,971	1,888	6,859	37,850	14,732	52,582
<u>LONDON OFFICE</u>						
<u>Northern Europe</u>						
U.K.	7,929	5,577	13,506	39,890	23,358	63,248
Denmark	29	2	31	282	6	288
Finland	13	0	13	220	6	226
Norway	34	2	36	298	9	307
Sweden	45	7	52	515	16	531
<u>Southern Europe</u>						
Greece	10	0	10	62	9	71
Italy	308	643	951	3,511	6,986	10,497
Portugal	12	159	171	147	162	309
Spain	95	1,307	1,402	474	1,335	1,809
<u>Western Europe</u>						
Austria	115	2	117	923	518	1,441
Belgium	91	657	748	726	670	1,396
France	131	46	177	1,192	109	1,301
Germany	1,197	13	1,210	8,718	104	8,822
Luxemburg	7	2	9	50	2	52
Netherlands	251	41	292	1,374	49	1,423
Switzerland	109	10	119	777	1,236	2,013
<u>Central/East Europe</u>						
Czechoslovakia	38	0	38	207	11	218
Hungary	5	0	5	88	7	95
Poland	39	0	39	412	6	418
Russia	93	1	94	533	14	547
Other Europe	78	5	83	520	205	725
Total	10,629	8,474	19,103	60,919	34,818	95,737

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MAY 2004			JANUARY - MAY 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>OTHER COUNTRIES</u>						
<u>CENTRAL AMERICA</u>						
Mexico	123	4	127	694	202	896
Belize	43	0	43	203	0	203
Costa Rica	62	33	95	247	33	280
El Salvador	16	62	78	44	62	106
Guatemala	29	88	117	136	89	225
Honduras	8	37	45	98	37	135
Nicaragua	2	11	13	23	11	34
Panama	79	0	79	443	0	443
Total	<u>362</u>	<u>235</u>	<u>597</u>	<u>1,888</u>	<u>434</u>	<u>2,322</u>
<u>SOUTH AMERICA</u>						
Argentina	41	0	41	230	1	231
Bolivia	5	0	5	20	0	20
Brazil	55	0	55	386	4	390
Chile	36	1	37	224	2	226
Colombia	22	0	22	130	0	130
Ecuador	9	0	9	42	1	43
Guyana	107	0	107	647	1	648
Paraguay	0	0	0	9	0	9
Peru	31	0	31	134	1	135
Surinam	12	0	12	90	1	91
Uruguay	4	0	4	47	0	47
Venezuela	61	0	61	275	2	277
Other South America	0	0	0	1	0	1
Total	<u>383</u>	<u>1</u>	<u>384</u>	<u>2,235</u>	<u>13</u>	<u>2,248</u>
Total Latin America	<u>745</u>	<u>236</u>	<u>981</u>	<u>4,123</u>	<u>447</u>	<u>4,570</u>

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

	MAY 2004			JANUARY - MAY 2004		
	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS	SCHEDULED AIRLINES	CHARTERED AIRLINES	TOTAL STOPOVERS
<u>CARIBBEAN</u>						
Antigua	92	0	92	684	1	685
Bahamas	247	0	247	1,091	4	1,095
Barbados	362	0	362	2,062	1	2,063
Bermuda	96	0	96	781	2	783
British Virgin Is.	90	0	90	310	0	310
Cayman Is.	997	0	997	5,268	0	5,268
Dominica	18	0	18	101	0	101
Grenada	33	0	33	215	1	216
Monsterrat	19	0	19	48	0	48
St. Kitts/Nevis/Anguilla	78	0	78	383	0	383
St. Lucia	103	0	103	641	0	641
St. Vincent	36	0	36	199	1	200
Turks & Caicos Is.	78	0	78	403	0	403
Trinidad & Tobago	475	0	475	2,753	3	2,756
Comm. Caribbean	2,724	0	2,724	14,939	13	14,952
Aruba	22	0	22	119	0	119
Bonaire	6	0	6	20	0	20
Cuba	21	0	21	175	4	179
Curacao	83	0	83	370	0	370
Dominican Republic	62	0	62	399	4	403
Guadelope	4	0	4	79	0	79
Haiti	38	0	38	146	0	146
Puerto Rico	95	0	95	596	3	599
St. Maarten	52	0	52	208	0	208
All other Caribbean	126	0	126	294	0	294
Other Caribbean	509	0	509	2,406	11	2,417
TOTAL CARIBBEAN	3,233	0	3,233	17,345	24	17,369
<u>OTHER COUNTRIES</u>						
African Countries	109	4	113	404	15	419
Isreal	58	0	58	370	2	372
Saudi Arabia	9	0	9	13	0	13
Turkey	17	1	18	80	6	86
Other Middle East	27	0	27	88	15	103
India & Pakistan	77	0	77	261	7	268
Japan	303	0	303	2,075	4	2,079
China	63	0	63	200	4	204
Taiwan	2	0	2	15	0	15
Korea	30	0	30	107	2	109
Philippines	51	0	51	257	0	257
Singapore	5	0	5	47	1	48
Other Asia	39	0	39	146	2	148
Australia	129	4	133	582	6	588
New Zealand	43	0	43	129	3	132
All Other Ctries	1	0	1	14	0	14
Total	963	9	972	4,788	67	4,855
GRAND TOTAL	96,889	14,870	111,759	511,243	97,702	608,945

Stopover Arrivals
By Intended Resort Area of Stay

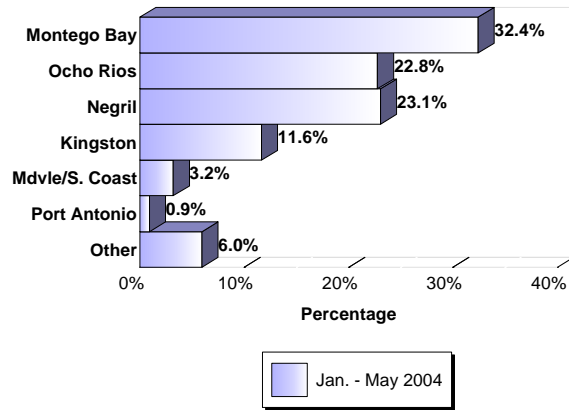


Fig. 5

STOPOVER ARRIVALS BY INTENDED AREA OF STAY

Area	MAY		JAN.- MAY		JAN.- MAY		%Change 2004/03
	2004	%Share	2004	%Share	2003	%Share	
Montego Bay	35,068	31.4%	197,456	32.4%	182,831	32.9%	8.0%
Ocho Rios	24,543	22.0%	138,630	22.8%	121,157	21.8%	14.4%
Negril	27,257	24.4%	140,588	23.1%	125,067	22.5%	12.4%
Kingston	13,266	11.9%	70,898	11.6%	70,149	12.6%	1.1%
Mdvle/S. Coast	3,595	3.2%	19,446	3.2%	17,719	3.2%	9.7%
Port Antonio	938	0.8%	5,655	0.9%	5,076	0.9%	11.4%
Other	7,092	6.3%	36,272	6.0%	34,245	6.2%	5.9%
Total	111,759	100.0%	608,945	100.0%	556,244	100.0%	9.5%