

JAMAICA TOURIST BOARD

IN JANUARY 2017...

- Stopover arrivals up 3.5%
- US Market up 1.9%
- Canada up 6.3%
- Europe up 7.8%
- Cruise Passenger up by 10.2%

TOURIST (Stopover Arrivals)

Stopover arrivals in January 2017 were **185,873**, an increase of **3.5%** over the **179,559** recorded in January 2016.

United States

Stopover arrivals from the United States market recorded a **1.9%** increase in January 2017, with a total of **103,026** arrivals compared to the **101,143** arrivals who visited in January 2016. All marketing regions recorded increased arrivals. The Northeast with **42,896** increased by **0.8%**, the Mid-west with **29,056** increased by **1.7%**, the South with **20,973** increased by **2.9%**, and the West with **10,101** increased by **4.9%**.

Canada

In January 2017, the Canadian market recorded an increase in arrivals of **6.3%**, with **45,905** stopovers compared to **43,176** in January 2016.

Stopover arrivals from Atlantic Canada grew by **19.2%**, the main provinces of Nova Scotia increased by **19.9%**, over January 2016 and those from New Brunswick increased by **16.9%**.

Stopover arrivals from Central Canada increased by **7.5%**, the leading province of Ontario up by **10.0%**, and the second most important Canadian province of Quebec down by **3.7%**.

Stopover arrivals from Western Canada was at the same level as in 2016. The main province of Alberta recorded an increase of **6.2%**, and arrivals from Manitoba increased by **0.6%**.

Europe

The European market region recorded an increase of **7.8%** in January 2017, with **28,729** stopover arrivals compared to the **26,638** recorded in January 2016.

In the Northern European region, the main visitor producing countries, United Kingdom, with **17,552** arrivals, grew by **14.3%** and Sweden with **1,933** arrivals fell by **25.0%**.

In the South-Western European region, Germany with **2,283** visitor arrivals increased by **17.9%**, Italy with **1,791** arrivals grew by **23.2%**, the Netherlands with **677** arrivals grew by **2.3%**, France with **655** visitors increased by **15.5%**, and Belgium with **542** arrivals rose by **21.0%**.

Stopover arrivals from Central-East Europe with **1,467** arrivals grew by **84.8%**. The main producing country, Poland, with **810** arrivals grew by **406.3%**.

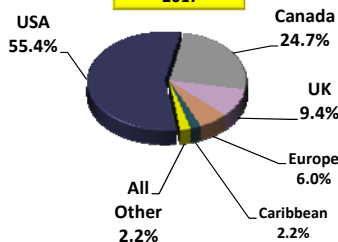
Latin America

Arrivals from Latin America increased by **16.9%** in January 2017, with a total of **2,805** stopovers compared to **2,400** in January 2016.

From the Central American region, stopover arrivals declined by **20.4%** with **618** arrivals. Mexico with **293** arrivals declined by **28.5%**, while Panama with **127** grew by **1.6%**.

From the South American region, stopover arrivals grew by **34.7%** with **2,147** arrivals. Argentina with **806** arrivals increased by **80.7%** and Chile with **453** arrivals grew by **20.5%**.

MARKET SHARE
January
2017



The Caribbean

Stopover arrivals to Jamaica from the Caribbean region fell by **13.3%** in January 2017 with a total of **4,147** visitors, compared to **4,785** in January 2016.

The Cayman Islands and Trinidad & Tobago continued to be the major visitor producing Caribbean countries in January 2017 with **1,054** and **810** stopover arrivals, respectively.

Asia

The Asian market fell by **0.1%** in January 2017 with a total of **728** stopovers compared to **729** in January 2016.

China, Japan, and India, are the major visitor-producing countries with **263**, **188** and **107** stopovers arriving from each country, respectively.

Other Countries

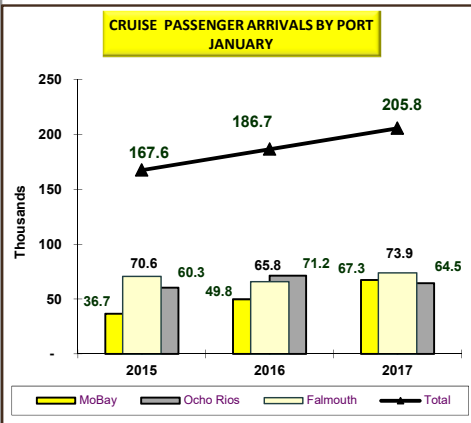
Overall, stopover arrivals from other countries declined by **22.5%** in January 2017. Of the Other Countries, Australia provided the most stop-over arrivals to Jamaica, with **271** visitors in 2017 compared to **340** in 2016. This represents an decrease of **20.3%**.

Market Share

The market share of stopover visitors for January 2017 was as follows: USA **55.4%**; Canada **24.7%**; UK **9.4%**; Continental Europe **6.0%**, the Caribbean **2.2%**; and the others, including Latin America and Asia **2.2%**.

Cruise Passengers

A total of **205,812** cruise passengers visited Jamaica in January, 2017. This represented a **10.2%** increase over the **186,741** for January 2016.



For January 2017, Cruise passengers visiting the Falmouth port increased by **12.4%**. Cruise passengers visiting the port of Montego Bay increased by **35.1%** and those visiting Ocho Rios declined by **9.5%**.

Length of Stay

The average length of stay of **Foreign National** arrivals in January 2017 was **9** nights compared to **8.9** nights in January 2016. The average length of stay in hotels was **7.2** nights in January 2017, which was the same level as in January 2016.

The average length of stay of **Non-Resident Jamaican** arrivals in January 2017 was **17.0** nights compared to **16.8** in January 2016. The average length of stay in hotels in January 2017 was **8.2** nights, which was the same level as in January 2016.

Purpose of Visit

During January 2017, **89.6%** or **157,059** of the **175,259 Foreign Nationals** visited Jamaica for Leisure, **4.9%** were on Business, **5.0%** were on Other purposes of travel and **0.5%** did not state their purpose of travel.

A total of **8,085** or **76.2%** of the **10,614 Non-Resident Jamaicans** were visiting for Leisure, **4.5%** were on Business, **16.5%** were on Other purposes of travel and **2.8%** failed to provide a reason for travel.

Intended Resort Area of Stay

Of the **185,873** stopover arrivals visiting Jamaica in January 2017, the resort area of Montego Bay welcomed **70,533** arrivals or **37.9%**; Ocho Rios received **41,664** or **22.4%**, Negril welcomed **35,162** or **18.9%**; and **16,762** or **9.0%** visited Kingston. The remaining **11.7%** stayed in the Mandeville/South Coast, Port Antonio resort regions and Other areas in Jamaica.

Type of Airlines used

Of the **185,873** stopover visitors to Jamaica in January 2017, **169,059** or **90.9%** used scheduled airlines, while **16,814** or **9.1%** used chartered flights.

During the corresponding period in 2016 the percentage distribution was: **91.6%** - used scheduled airlines and **8.4%** - used chartered flights.

TABLE 1

TOURIST ARRIVALS

January

2017

| Month | <----- Stopovers -----> | | | | | | Total Stopover Arrivals | +/- 2017/16 | +/- 2017/15 |
|---------|-------------------------|----------------|----------------|---------------------------|----------------|----------------|-------------------------------|----------------|----------------|
| | Foreign Nationals | +/- 2017/16 | +/- 2017/15 | Non-Resident Jamaicans | +/- 2017/16 | +/- 2017/15 | | | |
| January | 175,259 | 3.4% | 5.2% | 10,614 | 5.4% | 6.5% | 185,873 | 3.5% | 5.2% |

Research & Marketing Intelligence Unit
Marketing Dept.
Jamaica Tourist Board
March 13, 2017.

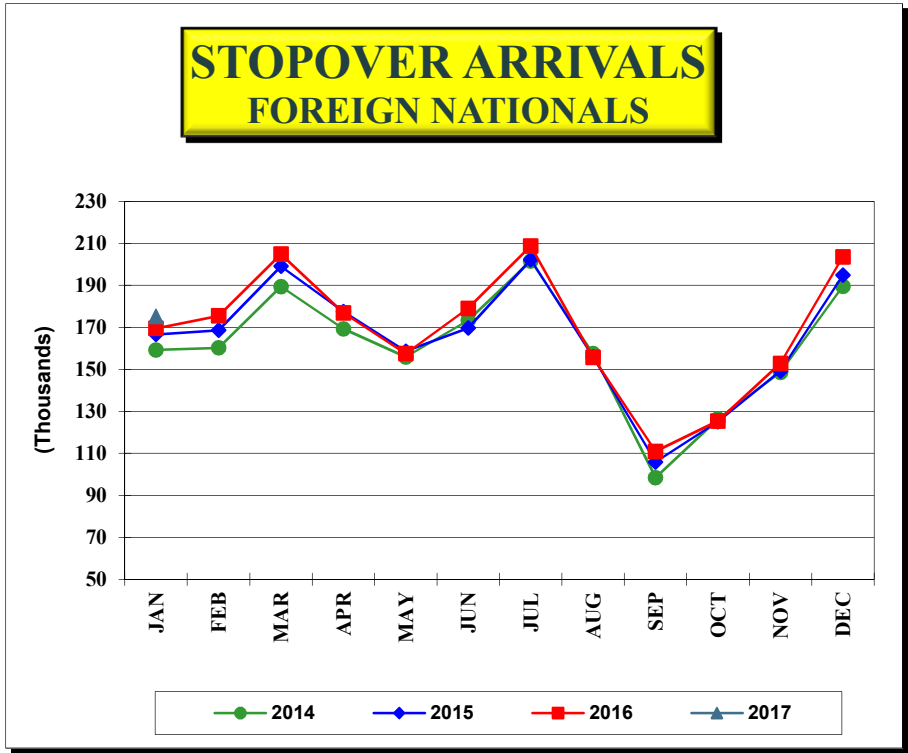


FIG. 1

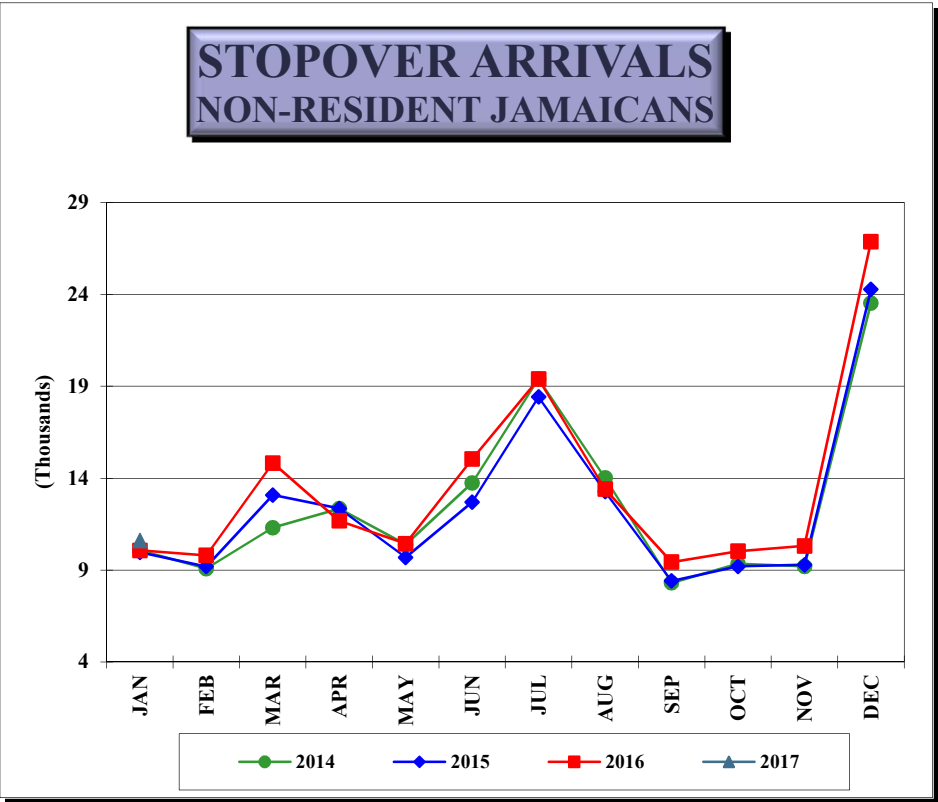


FIG. 1a

STOPOVER ARRIVALS BY PURPOSE OF VISIT JANUARY 2017

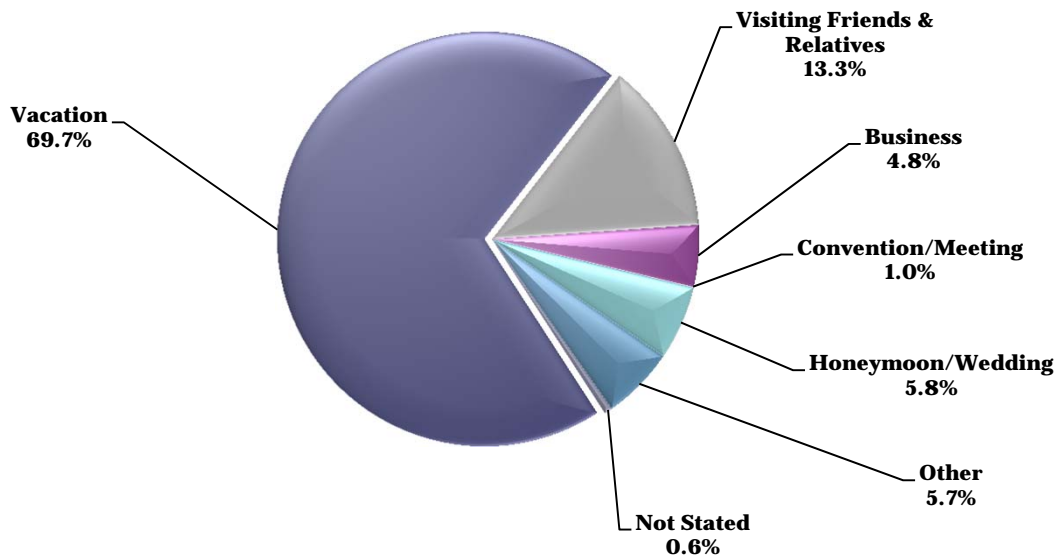


Fig. 1b

| STOPOVER ARRIVALS BY PURPOSE OF VISIT | | | | | | |
|---------------------------------------|----------------------|---------------|---------------------------|---------------|----------------|---------------|
| January 2017 | Foreign Nationals | % Share | Non Resident Jamaicans | % Share | Total | % Share |
| Vacation | 127,202 | 72.6% | 2,364 | 22.3% | 129,566 | 69.7% |
| Visiting Friends & Relatives | 19,264 | 11.0% | 5,548 | 52.3% | 24,812 | 13.3% |
| Business | 8,438 | 4.8% | 479 | 4.5% | 8,917 | 4.8% |
| Convention/Meeting | 89 | 0.1% | 5 | 0.0% | 94 | 0.1% |
| Honeymoon/Wedding | 10,593 | 6.0% | 173 | 1.6% | 10,766 | 5.8% |
| Other | 8,790 | 5.0% | 1,748 | 16.5% | 10,538 | 5.7% |
| Not Stated | 883 | 0.5% | 297 | 2.8% | 1,180 | 0.6% |
| TOTAL | 175,259 | 100.0% | 10,614 | 100.0% | 185,873 | 100.0% |

TABLE 1.2
STOPOVER ARRIVALS BY MARKET REGION
AND MONTH OF ARRIVAL 2017

| | U.S.A. | | | | | Canada | U.K. Europe | Latin America | Caribbean | Asia | Other Countries | Total |
|----------------|-------------|-------------|-------------|-------------|----------------|-------------|----------------|------------------|---------------|--------------|--------------------|----------------|
| | Northeast | Mid-West | South | West | Total | | | | | | | |
| January | 42,896 | 29,056 | 20,973 | 10,101 | 103,026 | 45,905 | 28,729 | 2,805 | 4,147 | 728 | 533 | 185,873 |
| +/- % | 0.8% | 1.7% | 2.9% | 4.9% | 1.9% | 6.3% | 7.8% | 16.9% | -13.3% | -0.1% | -22.5% | 3.5% |

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

| | <u>JANUARY</u> | | | | <u>% Change</u> | | |
|-------------------------|----------------|---------------|---------------|---------------|-----------------|----------------|----------------|
| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2017/16</u> | <u>2017/15</u> | <u>2017/14</u> |
| <u>U.S.A.</u> | | | | | | | |
| <u>NORTHEAST</u> | | | | | | | |
| Connecticut | 2,198 | 2,228 | 2,455 | 2,341 | -4.6 | 5.1 | 6.5 |
| Delaware | 562 | 504 | 500 | 553 | 10.6 | 9.7 | -1.6 |
| Maine | 396 | 484 | 434 | 493 | 13.6 | 1.9 | 24.5 |
| Maryland | 3,275 | 3,668 | 3,424 | 3,747 | 9.4 | 2.2 | 14.4 |
| Massachusetts | 2,946 | 3,221 | 3,271 | 3,473 | 6.2 | 7.8 | 17.9 |
| New Hampshire | 522 | 525 | 618 | 662 | 7.1 | 26.1 | 26.8 |
| New Jersey | 4,357 | 4,604 | 5,023 | 5,210 | 3.7 | 13.2 | 19.6 |
| New York | 15,711 | 16,610 | 16,711 | 17,231 | 3.1 | 3.7 | 9.7 |
| Pennsylvania | 5,174 | 5,339 | 6,390 | 5,170 | -19.1 | -3.2 | -0.1 |
| Rhode Island | 342 | 374 | 415 | 431 | 3.9 | 15.2 | 26.0 |
| Vermont | 189 | 224 | 214 | 302 | 41.1 | 34.8 | 59.8 |
| Virginia | 2,445 | 2,176 | 2,359 | 2,463 | 4.4 | 13.2 | 0.7 |
| Washington D.C. | 465 | 539 | 513 | 583 | 13.6 | 8.2 | 25.4 |
| West Virginia | 166 | 184 | 219 | 237 | 8.2 | 28.8 | 42.8 |
| Total | 38,748 | 40,680 | 42,546 | 42,896 | 0.8 | 5.4 | 10.7 |
| <u>MIDWEST</u> | | | | | | | |
| Illinois | 4,339 | 5,040 | 5,408 | 5,378 | -0.6 | 6.7 | 23.9 |
| Indiana | 1,720 | 1,935 | 1,635 | 1,573 | -3.8 | -18.7 | -8.5 |
| Iowa | 1,809 | 2,315 | 2,614 | 2,384 | -8.8 | 3.0 | 31.8 |
| Kansas | 791 | 723 | 789 | 800 | 1.4 | 10.7 | 1.1 |
| Kentucky | 600 | 472 | 522 | 604 | 15.7 | 28.0 | 0.7 |
| Michigan | 1,919 | 2,422 | 2,690 | 2,943 | 9.4 | 21.5 | 53.4 |
| Minnesota | 2,795 | 3,661 | 4,032 | 3,649 | -9.5 | -0.3 | 30.6 |
| Missouri | 1,357 | 1,679 | 2,069 | 1,978 | -4.4 | 17.8 | 45.8 |
| Nebraska | 934 | 1,096 | 1,150 | 1,421 | 23.6 | 29.7 | 52.1 |
| North Dakota | 741 | 749 | 659 | 799 | 21.2 | 6.7 | 7.8 |
| Ohio | 1,768 | 2,286 | 2,209 | 2,473 | 12.0 | 8.2 | 39.9 |
| South Dakota | 588 | 539 | 722 | 618 | -14.4 | 14.7 | 5.1 |
| Wisconsin | 3,780 | 3,715 | 4,081 | 4,436 | 8.7 | 19.4 | 17.4 |
| Total | 23,141 | 26,632 | 28,580 | 29,056 | 1.7 | 9.1 | 25.6 |

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

| | <u>JANUARY</u> | | | | <u>% C h a n g e</u> | | |
|---------------------|----------------|---------------|----------------|----------------|----------------------|-------------|-------------|
| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | 2017/16 | 2017/15 | 2017/14 |
| <u>SOUTH</u> | | | | | | | |
| Alabama | 380 | 368 | 519 | 410 | -21.0 | 11.4 | 7.9 |
| Arkansas | 246 | 286 | 291 | 272 | -6.5 | -4.9 | 10.6 |
| Florida | 10,906 | 11,458 | 12,160 | 12,596 | 3.6 | 9.9 | 15.5 |
| Georgia | 2,469 | 3,220 | 3,231 | 3,254 | 0.7 | 1.1 | 31.8 |
| Louisiana | 350 | 367 | 372 | 457 | 22.8 | 24.5 | 30.6 |
| Mississippi | 157 | 193 | 209 | 213 | 1.9 | 10.4 | 35.7 |
| North Carolina | 1,551 | 1,625 | 1,877 | 1,984 | 5.7 | 22.1 | 27.9 |
| South Carolina | 684 | 662 | 714 | 805 | 12.7 | 21.6 | 17.7 |
| Tennessee | 777 | 892 | 1,016 | 982 | -3.3 | 10.1 | 26.4 |
| Total | 17,520 | 19,071 | 20,389 | 20,973 | 2.9 | 10.0 | 19.7 |
| <u>WEST</u> | | | | | | | |
| Alaska | 72 | 45 | 40 | 70 | 75.0 | 55.6 | -2.8 |
| Arizona | 364 | 461 | 501 | 477 | -4.8 | 3.5 | 31.0 |
| California | 2,328 | 2,590 | 2,853 | 3,212 | 12.6 | 24.0 | 38.0 |
| Colorado | 873 | 802 | 920 | 993 | 7.9 | 23.8 | 13.7 |
| Hawaii | 19 | 37 | 23 | 22 | -4.3 | -40.5 | 15.8 |
| Idaho | 100 | 137 | 87 | 114 | 31.0 | -16.8 | 14.0 |
| Montana | 100 | 193 | 179 | 167 | -6.7 | -13.5 | 67.0 |
| Nevada | 209 | 206 | 294 | 272 | -7.5 | 32.0 | 30.1 |
| New Mexico | 95 | 129 | 120 | 162 | 35.0 | 25.6 | 70.5 |
| Oklahoma | 342 | 411 | 371 | 484 | 30.5 | 17.8 | 41.5 |
| Oregon | 210 | 245 | 253 | 267 | 5.5 | 9.0 | 27.1 |
| Texas | 2,138 | 2,386 | 3,163 | 3,072 | -2.9 | 28.8 | 43.7 |
| Utah | 164 | 397 | 253 | 247 | -2.4 | -37.8 | 50.6 |
| Washington | 425 | 450 | 505 | 464 | -8.1 | 3.1 | 9.2 |
| Wyoming | 50 | 105 | 66 | 78 | 18.2 | -25.7 | 56.0 |
| Total | 7,489 | 8,594 | 9,628 | 10,101 | 4.9 | 17.5 | 34.9 |
| TOTAL U.S.A. | 86,898 | 94,977 | 101,143 | 103,026 | 1.9 | 8.5 | 18.6 |

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

| | <u>JANUARY</u> | | | | <u>% Change</u> | | |
|-----------------------------------|----------------|---------------|---------------|---------------|-----------------|----------------|----------------|
| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2017/16</u> | <u>2017/15</u> | <u>2017/14</u> |
| <u>CANADA</u> | | | | | | | |
| <u>Atlantic Canada</u> | | | | | | | |
| New Brunswick | 421 | 329 | 295 | 345 | 16.9 | 4.9 | -18.1 |
| Newfoundland | 286 | 224 | 211 | 259 | 22.7 | 15.6 | -9.4 |
| Nova Scotia | 731 | 615 | 502 | 602 | 19.9 | -2.1 | -17.6 |
| P.E. Island | 50 | 62 | 59 | 66 | 11.9 | 6.5 | 32.0 |
| Total | 1,488 | 1,230 | 1,067 | 1,272 | 19.2 | 3.4 | -14.5 |
| <u>Central Canada</u> | | | | | | | |
| Ontario | 29,992 | 30,217 | 27,619 | 30,368 | 10.0 | 0.5 | 1.3 |
| Quebec | 8,018 | 7,250 | 6,129 | 5,900 | -3.7 | -18.6 | -26.4 |
| Total | 38,010 | 37,467 | 33,748 | 36,268 | 7.5 | -3.2 | -4.6 |
| <u>Western Canada</u> | | | | | | | |
| Alberta | 5,144 | 4,121 | 2,927 | 3,109 | 6.2 | -24.6 | -39.6 |
| British Columbia | 1,218 | 1,162 | 1,125 | 1,116 | -0.8 | -4.0 | -8.4 |
| Manitoba | 2,316 | 2,237 | 2,104 | 2,117 | 0.6 | -5.4 | -8.6 |
| Saskatchewan | 2,600 | 2,542 | 2,145 | 1,969 | -8.2 | -22.5 | -24.3 |
| Other Canada | 80 | 45 | 60 | 54 | -10.0 | 20.0 | -32.5 |
| Total | 11,358 | 10,107 | 8,361 | 8,365 | 0.0 | -17.2 | -26.4 |
| Total Canada | 50,856 | 48,804 | 43,176 | 45,905 | 6.3 | -5.9 | -9.7 |
| <u>EUROPE</u> | | | | | | | |
| <u>Northern Europe</u> | | | | | | | |
| U.K. | 11,870 | 13,877 | 15,353 | 17,552 | 14.3 | 26.5 | 47.9 |
| Denmark | 137 | 429 | 456 | 117 | -74.3 | -72.7 | -14.6 |
| Finland | 152 | 657 | 639 | 132 | -79.3 | -79.9 | -13.2 |
| Ireland | 181 | 254 | 207 | 283 | 36.7 | 11.4 | 56.4 |
| Norway | 104 | 160 | 442 | 151 | -65.8 | -5.6 | 45.2 |
| Sweden | 1,566 | 1,834 | 2,576 | 1,933 | -25.0 | 5.4 | 23.4 |
| Total | 14,010 | 17,211 | 19,673 | 20,168 | 2.5 | 17.2 | 44.0 |
| <u>Southern Europe</u> | | | | | | | |
| Greece | 23 | 19 | 26 | 16 | -38.5 | -15.8 | -30.4 |
| Italy | 1,111 | 1,274 | 1,454 | 1,791 | 23.2 | 40.6 | 61.2 |
| Portugal | 16 | 28 | 77 | 36 | -53.2 | 28.6 | 125.0 |
| Spain | 195 | 208 | 321 | 368 | 14.6 | 76.9 | 88.7 |
| <u>Western Europe</u> | | | | | | | |
| Austria | 328 | 410 | 311 | 327 | 5.1 | -20.2 | -0.3 |
| Belgium | 482 | 514 | 448 | 542 | 21.0 | 5.4 | 12.4 |
| France | 2,018 | 543 | 567 | 655 | 15.5 | 20.6 | -67.5 |
| Germany | 2,131 | 2,136 | 1,936 | 2,283 | 17.9 | 6.9 | 7.1 |
| Luxemburg | 21 | 26 | 25 | 21 | -16.0 | -19.2 | 0.0 |
| Netherlands | 585 | 584 | 662 | 677 | 2.3 | 15.9 | 15.7 |
| Switzerland | 301 | 348 | 344 | 378 | 9.9 | 8.6 | 25.6 |
| Total | 7,211 | 6,090 | 6,171 | 7,094 | 15.0 | 16.5 | -1.6 |
| <u>Central/East Europe</u> | | | | | | | |
| Czech Republic | 234 | 324 | 38 | 73 | 92.1 | -77.5 | -68.8 |
| Hungary | 79 | 89 | 72 | 82 | 13.9 | -7.9 | 3.8 |
| Poland | 153 | 193 | 160 | 810 | 406.3 | 319.7 | 429.4 |
| Russia | 1,320 | 232 | 166 | 138 | -16.9 | -40.5 | -89.5 |
| Ukraine | 83 | 46 | 71 | 76 | 7.0 | 65.2 | -8.4 |
| Other Europe | 453 | 359 | 287 | 288 | 0.3 | -19.8 | -36.4 |
| Total | 2,322 | 1,243 | 794 | 1,467 | 84.8 | 18.0 | -36.8 |
| Total Europe | 23,543 | 24,544 | 26,638 | 28,729 | 7.8 | 17.1 | 22.0 |

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

| | <u>JANUARY</u> | | | | <u>% C h a n g e</u> | | |
|-------------------------------|----------------|--------------|--------------|--------------|----------------------|----------------|----------------|
| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2017/16</u> | <u>2017/15</u> | <u>2017/14</u> |
| <u>LATIN AMERICA</u> | | | | | | | |
| <u>CENTRAL AMERICA</u> | | | | | | | |
| Mexico | 191 | 395 | 410 | 293 | -28.5 | -25.8 | 53.4 |
| Belize | 44 | 61 | 84 | 55 | -34.5 | -9.8 | 25.0 |
| Costa Rica | 66 | 97 | 93 | 65 | -30.1 | -33.0 | -1.5 |
| El Salvador | 14 | 47 | 15 | 19 | 26.7 | -59.6 | 35.7 |
| Guatemala | 27 | 92 | 32 | 34 | 6.3 | -63.0 | 25.9 |
| Honduras | 8 | 43 | 6 | 14 | 133.3 | -67.4 | 75.0 |
| Nicaragua | 2 | 5 | 11 | 11 | 0.0 | 120.0 | 450.0 |
| Panama | 153 | 160 | 125 | 127 | 1.6 | -20.6 | -17.0 |
| Total | 505 | 900 | 776 | 618 | -20.4 | -31.3 | 22.4 |
| <u>SOUTH AMERICA</u> | | | | | | | |
| Argentina | 654 | 473 | 446 | 806 | 80.7 | 70.4 | 23.2 |
| Bolivia | 9 | 15 | 13 | 12 | -7.7 | -20.0 | 33.3 |
| Brazil | 315 | 395 | 309 | 449 | 45.3 | 13.7 | 42.5 |
| Chile | 444 | 328 | 376 | 453 | 20.5 | 38.1 | 2.0 |
| Colombia | 336 | 259 | 250 | 219 | -12.4 | -15.4 | -34.8 |
| Ecuador | 43 | 11 | 19 | 26 | 36.8 | 136.4 | -39.5 |
| Paraguay | 28 | 11 | 15 | 45 | 200.0 | 309.1 | 60.7 |
| Peru | 91 | 58 | 125 | 89 | -28.8 | 53.4 | -2.2 |
| Uruguay | 41 | 104 | 23 | 31 | 34.8 | -70.2 | -24.4 |
| Venezuela | 62 | 57 | 42 | 55 | 31.0 | -3.5 | -11.3 |
| Other South America | 1 | 0 | 6 | 2 | -66.7 | - | 100.0 |
| Total | 2,024 | 1,711 | 1,624 | 2,187 | 34.7 | 27.8 | 8.1 |
| Total Latin America | 2,529 | 2,611 | 2,400 | 2,805 | 16.9 | 7.4 | 10.9 |

TABLE 2

TOTAL STOPOVER ARRIVALS BY PERMANENT RESIDENCE

| | <u>JANUARY</u> | | | | <u>% Change</u> | | |
|-------------------------------|----------------|----------------|----------------|----------------|-----------------|----------------|----------------|
| | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2017/16</u> | <u>2017/15</u> | <u>2017/14</u> |
| <u>CARIBBEAN</u> | | | | | | | |
| Antigua | 140 | 160 | 161 | 139 | -13.7 | -13.1 | -0.7 |
| Bahamas | 379 | 460 | 412 | 396 | -3.9 | -13.9 | 4.5 |
| Barbados | 316 | 280 | 337 | 271 | -19.6 | -3.2 | -14.2 |
| Bermuda | 175 | 207 | 157 | 198 | 26.1 | -4.3 | 13.1 |
| British Virgin Is. | 84 | 59 | 69 | 48 | -30.4 | -18.6 | -42.9 |
| Cayman Is. | 992 | 1,035 | 1,093 | 1,054 | -3.6 | 1.8 | 6.3 |
| Dominica | 31 | 26 | 33 | 27 | -18.2 | 3.8 | -12.9 |
| Grenada | 54 | 21 | 47 | 34 | -27.7 | 61.9 | -37.0 |
| Guyana | 141 | 132 | 147 | 104 | -29.3 | -21.2 | -26.2 |
| Monsterrat | 5 | 23 | 24 | 5 | -79.2 | -78.3 | 0.0 |
| St. Kitts/Nevis/Anguilla | 86 | 74 | 81 | 68 | -16.0 | -8.1 | -20.9 |
| St. Lucia | 79 | 61 | 106 | 46 | -56.6 | -24.6 | -41.8 |
| St. Vincent | 23 | 48 | 53 | 55 | 3.8 | 14.6 | 139.1 |
| Turks & Caicos Is. | 219 | 226 | 288 | 248 | -13.9 | 9.7 | 13.2 |
| Trinidad & Tobago | 860 | 856 | 982 | 810 | -17.5 | -5.4 | -5.8 |
| Comm. Caribbean | 3,584 | 3,668 | 3,990 | 3,503 | -12.2 | -4.5 | -2.3 |
| Aruba | 37 | 45 | 27 | 27 | 0.0 | -40.0 | -27.0 |
| Cuba | 113 | 144 | 204 | 186 | -8.8 | 29.2 | 64.6 |
| Curacao | 92 | 46 | 56 | 49 | -12.5 | 6.5 | -46.7 |
| Dominican Republic | 133 | 147 | 272 | 165 | -39.3 | 12.2 | 24.1 |
| Guadelope | 14 | 11 | 6 | 8 | 33.3 | -27.3 | -42.9 |
| Haiti | 32 | 38 | 19 | 15 | -21.1 | -60.5 | -53.1 |
| Puerto Rico | 93 | 100 | 75 | 67 | -10.7 | -33.0 | -28.0 |
| St. Maarten | 71 | 51 | 73 | 68 | -6.8 | 33.3 | -4.2 |
| Surinam | 29 | 17 | 35 | 32 | -8.6 | 88.2 | 10.3 |
| All other Caribbean | 53 | 48 | 28 | 27 | -3.6 | -43.8 | -49.1 |
| Other Caribbean | 667 | 647 | 795 | 644 | -19.0 | -0.5 | -3.4 |
| TOTAL CARIBBEAN | 4,251 | 4,315 | 4,785 | 4,147 | -13.3 | -3.9 | -2.4 |
| <u>ASIA</u> | | | | | | | |
| India | 112 | 96 | 137 | 107 | -21.9 | 11.5 | -4.5 |
| Pakistan | 5 | 4 | 0 | 1 | - | -75.0 | -80.0 |
| Japan | 234 | 177 | 150 | 188 | 25.3 | 6.2 | -19.7 |
| China | 178 | 327 | 319 | 263 | -17.6 | -19.6 | 47.8 |
| Taiwan | 9 | 16 | 1 | 11 | 1000.0 | -31.3 | 22.2 |
| Korea | 37 | 77 | 42 | 60 | 42.9 | -22.1 | 62.2 |
| Philippines | 10 | 18 | 46 | 47 | 2.2 | 161.1 | 370.0 |
| Singapore | 14 | 3 | 12 | 13 | 8.3 | 333.3 | -7.1 |
| Other Asia | 44 | 48 | 22 | 38 | 72.7 | -20.8 | -13.6 |
| Total Asia | 643 | 766 | 729 | 728 | -0.1 | -5.0 | 13.2 |
| <u>OTHER COUNTRIES</u> | | | | | | | |
| African Countries | 94 | 85 | 141 | 99 | -29.8 | 16.5 | 5.3 |
| Israel | 58 | 49 | 100 | 50 | -50.0 | 2.0 | -13.8 |
| Saudi Arabia | 13 | 4 | 3 | 2 | -33.3 | -50.0 | -84.6 |
| Turkey | 14 | 148 | 22 | 17 | -22.7 | -88.5 | 21.4 |
| Other Middle East | 50 | 49 | 52 | 63 | 21.2 | 28.6 | 26.0 |
| Australia | 301 | 247 | 340 | 271 | -20.3 | 9.7 | -10.0 |
| New Zealand | 23 | 20 | 29 | 28 | -3.4 | 40.0 | 21.7 |
| All Other Ctries | 7 | 2 | 1 | 3 | 200.0 | 50.0 | -57.1 |
| Total | 560 | 604 | 688 | 533 | -22.5 | -11.8 | -4.8 |
| GRAND TOTAL | 169,280 | 176,621 | 179,559 | 185,873 | 3.5 | 5.2 | 9.8 |

STOPOVER VISITORS BY MARKET SHARE

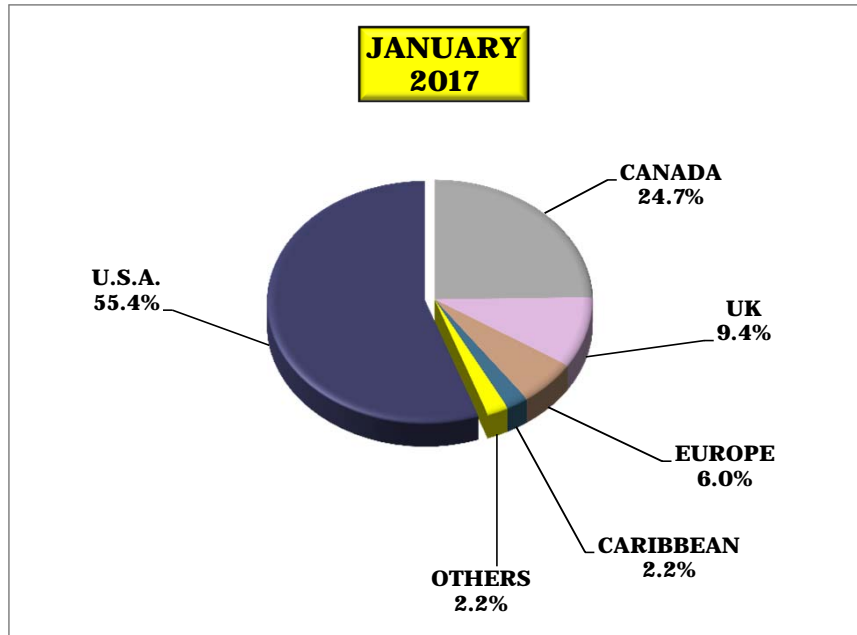


Fig. 2

| Country | January 2017 | % Share | January 2016 | % Share | January 2015 | % Share | %Change 2017/16 |
|--------------|----------------|---------------|----------------|---------------|----------------|---------------|-----------------|
| U.S.A | 103,026 | 55.4% | 101,143 | 56.3% | 94,977 | 53.8% | 1.9% |
| CANADA | 45,905 | 24.7% | 43,176 | 24.0% | 48,804 | 27.6% | 6.3% |
| U.K. | 17,552 | 9.4% | 15,353 | 8.6% | 13,877 | 7.9% | 14.3% |
| EUROPE | 11,177 | 6.0% | 11,285 | 6.3% | 10,667 | 6.0% | -1.0% |
| CARIBBEAN | 4,147 | 2.2% | 4,785 | 2.7% | 4,315 | 2.4% | -13.3% |
| OTHERS | 4,066 | 2.2% | 3,817 | 2.1% | 3,981 | 2.3% | 6.5% |
| Total | 185,873 | 100.0% | 179,559 | 100.0% | 176,621 | 100.0% | 3.5% |

TABLE 3

| AVERAGE LENGTH OF STAY (Nights) | | | | | | | | | |
|--|-----------------------------------|------|--------------|------|------|--------------------------------------|------|--------------|--|
| January | <u>FOREIGN NATIONALS</u> | | | | | <u>NON-RESIDENT JAMAICANS</u> | | | |
| | All Types of Accommodation | | Hotel | | | All Types of Accommodation | | Hotel | |
| | 2016 | 2017 | 2016 | 2017 | 2016 | 2017 | 2016 | 2017 | |
| | 8.9 | 9.0 | 7.2 | 7.2 | 16.8 | 17.0 | 8.2 | 8.2 | |

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

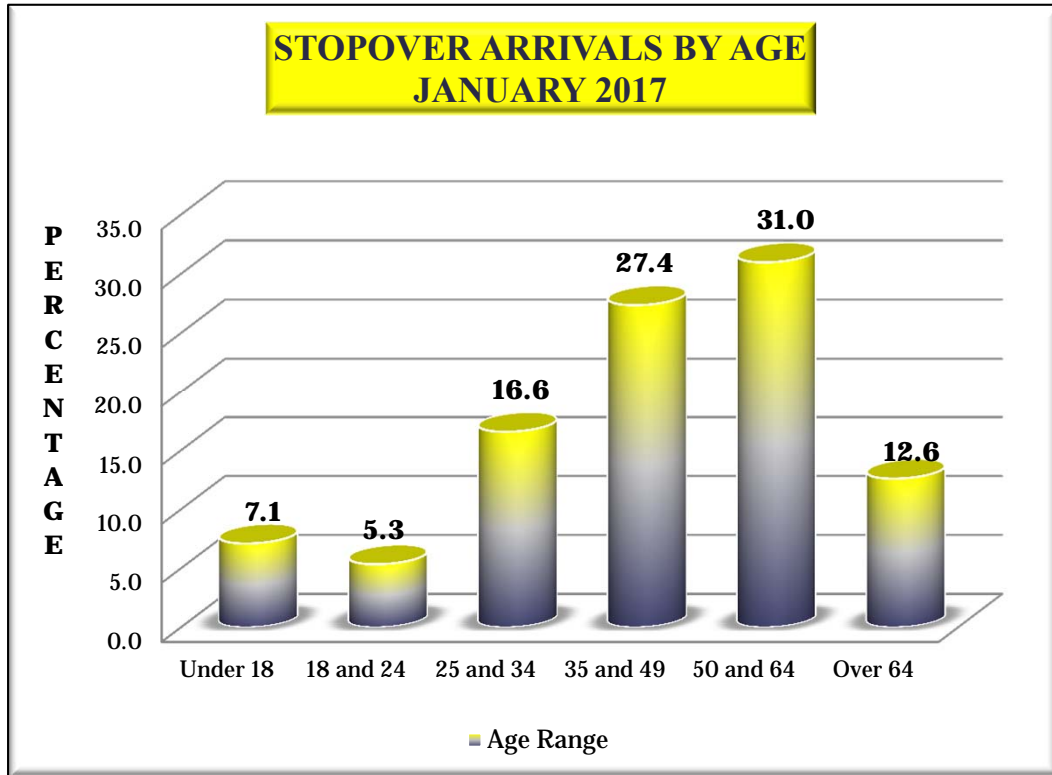


Fig. 3

AGE DISTRIBUTION OF STOPOVER ARRIVALS

| Age Range | JANUARY | | JANUARY | | JANUARY | | %Change 2017/16 |
|--------------|----------------|--------------|----------------|--------------|----------------|--------------|--------------------|
| | 2017 | % Share | 2016 | % Share | 2015 | % Share | |
| Under 18 | 13,218 | 7.1 | 12,289 | 6.8 | 12,015 | 6.8 | 7.6% |
| 18 and 24 | 9,942 | 5.3 | 9,725 | 5.4 | 9,722 | 5.5 | 2.2% |
| 25 and 34 | 30,825 | 16.6 | 32,251 | 18.0 | 31,487 | 17.8 | -4.4% |
| 35 and 49 | 50,863 | 27.4 | 49,376 | 27.5 | 49,939 | 28.3 | 3.0% |
| 50 and 64 | 57,587 | 31.0 | 54,191 | 30.2 | 54,220 | 30.7 | 6.3% |
| Over 64 | 23,438 | 12.6 | 21,727 | 12.1 | 19,238 | 10.9 | 7.9% |
| Total | 185,873 | 100.0 | 179,559 | 100.0 | 176,621 | 100.0 | 3.5% |

TABLE 4

CRUISE PASSENGER ARRIVALS BY MONTH AND PORT OF CALL

JANUARY 2017

| | MONTEGO BAY | | % Change 2017/16 | | FALMOUTH | | % Change 2017/16 | | OCHO RIOS | | % Change 2017/16 | | 2017 TOTAL | | 2016 TOTAL | | % Change 2017/16 | |
|---------|-------------|--------|---------------------|-------|----------|--------|---------------------|-------|-----------|--------|---------------------|-------|---------------|---------|---------------|---------|---------------------|-------|
| | CALLS | PAX | CALLS | PAX | CALLS | PAX | CALLS | PAX | CALLS | PAX | CALLS | PAX | CALLS | PAX | CALLS | PAX | CALLS | PAX |
| January | 33 | 67,268 | 22.2% | 35.1% | 18 | 73,897 | 5.9% | 12.4% | 25 | 64,461 | 0.0% | -9.5% | 78 | 205,812 | 69 | 186,741 | 13.0% | 10.2% |

Source: Port Authority of Jamaica, Cruise Vessels Information Sheet

* Note: 1. During the month of January, 2 ships with 186 passengers visited the port in Port Antonio.

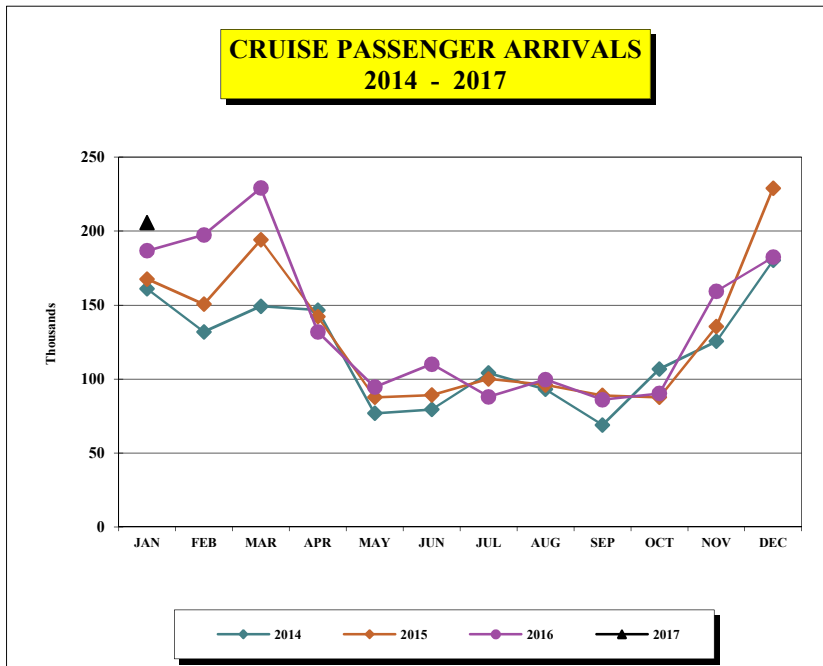


FIG. 4

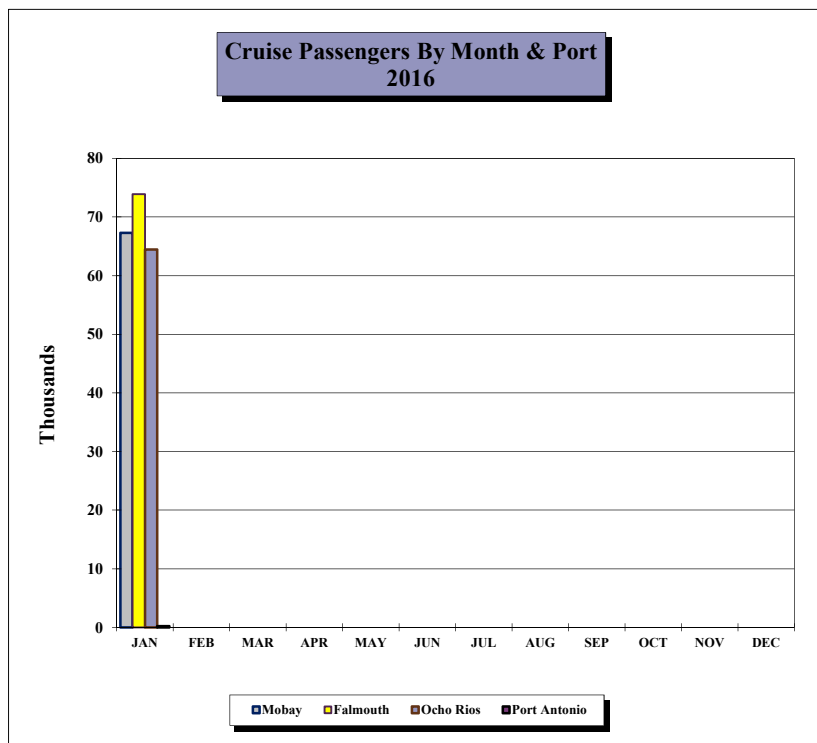


FIG. 4a

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

| JANUARY 2017 | | | |
|-------------------------|-------------------------------|-------------------------------|----------------------------|
| | SCHEDULED AIRLINES | CHARTERED AIRLINES | TOTAL STOPOVERS |
| U.S.A. | | | |
| <u>NORTHEAST</u> | | | |
| Connecticut | 2,341 | 0 | 2,341 |
| Delaware | 553 | 0 | 553 |
| Maine | 493 | 0 | 493 |
| Maryland | 3,747 | 0 | 3,747 |
| Massachusetts | 3,473 | 0 | 3,473 |
| New Hampshire | 662 | 0 | 662 |
| New Jersey | 5,209 | 1 | 5,210 |
| New York | 17,228 | 3 | 17,231 |
| Pennsylvania | 5,170 | 0 | 5,170 |
| Rhode Island | 431 | 0 | 431 |
| Vermont | 302 | 0 | 302 |
| Virginia | 2,461 | 2 | 2,463 |
| Washington D.C. | 583 | 0 | 583 |
| West Virginia | 236 | 1 | 237 |
| Total | 42,889 | 7 | 42,896 |
| <u>MIDWEST</u> | | | |
| Illinois | 4,771 | 607 | 5,378 |
| Indiana | 1,567 | 6 | 1,573 |
| Iowa | 2,078 | 306 | 2,384 |
| Kansas | 800 | 0 | 800 |
| Kentucky | 602 | 2 | 604 |
| Michigan | 2,923 | 20 | 2,943 |
| Minnesota | 2,248 | 1,401 | 3,649 |
| Missouri | 1,674 | 304 | 1,978 |
| Nebraska | 1,418 | 3 | 1,421 |
| North Dakota | 647 | 152 | 799 |
| Ohio | 2,473 | 0 | 2,473 |
| South Dakota | 594 | 24 | 618 |
| Wisconsin | 2,985 | 1,451 | 4,436 |
| Total | 24,780 | 4,276 | 29,056 |

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

| JANUARY 2017 | | | |
|---------------------|-------------------------------|-------------------------------|----------------------------|
| | SCHEDULED AIRLINES | CHARTERED AIRLINES | TOTAL STOPOVERS |
| <u>SOUTH</u> | | | |
| Alabama | 409 | 1 | 410 |
| Arkansas | 270 | 2 | 272 |
| Florida | 12,575 | 21 | 12,596 |
| Georgia | 3,252 | 2 | 3,254 |
| Louisiana | 457 | 0 | 457 |
| Mississippi | 213 | 0 | 213 |
| North Carolina | 1,984 | 0 | 1,984 |
| South Carolina | 805 | 0 | 805 |
| Tennessee | 982 | 0 | 982 |
| Total | 20,947 | 26 | 20,973 |
| <u>WEST</u> | | | |
| Alaska | 70 | 0 | 70 |
| Arizona | 472 | 5 | 477 |
| California | 3,210 | 2 | 3,212 |
| Colorado | 990 | 3 | 993 |
| Hawaii | 21 | 1 | 22 |
| Idaho | 114 | 0 | 114 |
| Montana | 167 | 0 | 167 |
| Nevada | 272 | 0 | 272 |
| New Mexico | 162 | 0 | 162 |
| Oklahoma | 482 | 2 | 484 |
| Oregon | 265 | 2 | 267 |
| Texas | 3,066 | 6 | 3,072 |
| Utah | 243 | 4 | 247 |
| Washington | 463 | 1 | 464 |
| Wyoming | 78 | 0 | 78 |
| Total | 10,075 | 26 | 10,101 |
| TOTAL U.S.A. | 98,691 | 4,335 | 103,026 |

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

| JANUARY 2017 | | | |
|-----------------------------------|-------------------------------|-------------------------------|----------------------------|
| | SCHEDULED AIRLINES | CHARTERED AIRLINES | TOTAL STOPOVERS |
| <u>CANADA</u> | | | |
| <u>Atlantic Canada</u> | | | |
| New Brunswick | 345 | 0 | 345 |
| Newfoundland | 259 | 0 | 259 |
| Nova Scotia | 602 | 0 | 602 |
| P.E. Island | 66 | 0 | 66 |
| Total | 1,272 | 0 | 1,272 |
| <u>Central Canada</u> | | | |
| Ontario | 30,360 | 8 | 30,368 |
| Quebec | 5,900 | 0 | 5,900 |
| Total | 36,260 | 8 | 36,268 |
| <u>Western Canada</u> | | | |
| Alberta | 3,109 | 0 | 3,109 |
| British Columbia | 1,116 | 0 | 1,116 |
| Manitoba | 2,117 | 0 | 2,117 |
| Saskatchewan | 1,969 | 0 | 1,969 |
| Northwest Territories | 54 | 0 | 54 |
| Total | 8,365 | 0 | 8,365 |
| Total | 45,897 | 8 | 45,905 |
| <u>EUROPE</u> | | | |
| <u>Northern Europe</u> | | | |
| U.K. | 7,424 | 10,128 | 17,552 |
| Denmark | 101 | 16 | 117 |
| Finland | 52 | 80 | 132 |
| Ireland | 213 | 70 | 283 |
| Norway | 101 | 50 | 151 |
| Sweden | 259 | 1,674 | 1,933 |
| Sub-Total | 8,150 | 12,018 | 20,168 |
| <u>Southern Europe</u> | | | |
| Greece | 15 | 1 | 16 |
| Italy | 1,783 | 8 | 1,791 |
| Portugal | 35 | 1 | 36 |
| Spain | 329 | 39 | 368 |
| <u>Western Europe</u> | | | |
| Austria | 326 | 1 | 327 |
| Belgium | 541 | 1 | 542 |
| France | 650 | 5 | 655 |
| Germany | 2,169 | 114 | 2,283 |
| Luxemburg | 21 | 0 | 21 |
| Netherlands | 673 | 4 | 677 |
| Switzerland | 373 | 5 | 378 |
| Sub-Total | 6,915 | 179 | 7,094 |
| <u>Central/East Europe</u> | | | |
| Czechoslovakia | 69 | 4 | 73 |
| Hungary | 79 | 3 | 82 |
| Poland | 798 | 12 | 810 |
| Russia | 138 | 0 | 138 |
| Ukraine | 75 | 0 | 75 |
| Other Europe | 248 | 41 | 289 |
| Sub-Total | 1,407 | 60 | 1,467 |
| Total | 16,472 | 12,257 | 28,729 |

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

| JANUARY 2017 | | | |
|-------------------------------|-------------------------------|-------------------------------|----------------------------|
| | SCHEDULED AIRLINES | CHARTERED AIRLINES | TOTAL STOPOVERS |
| <u>OTHER COUNTRIES</u> | | | |
| <u>CENTRAL AMERICA</u> | | | |
| Mexico | 293 | 0 | 293 |
| Belize | 55 | 0 | 55 |
| Costa Rica | 65 | 0 | 65 |
| El Salvador | 19 | 0 | 19 |
| Guatemala | 34 | 0 | 34 |
| Honduras | 11 | 3 | 14 |
| Nicaragua | 11 | 0 | 11 |
| Panama | 127 | 0 | 127 |
| Sub-Total | 615 | 3 | 618 |
| <u>SOUTH AMERICA</u> | | | |
| Argentina | 806 | 0 | 806 |
| Bolivia | 12 | 0 | 12 |
| Brazil | 449 | 0 | 449 |
| Chile | 452 | 1 | 453 |
| Colombia | 218 | 1 | 219 |
| Ecuador | 26 | 0 | 26 |
| Paraguay | 45 | 0 | 45 |
| Peru | 89 | 0 | 89 |
| Uruguay | 31 | 0 | 31 |
| Venezuela | 42 | 13 | 55 |
| Other South America | 2 | 0 | 2 |
| Sub-Total | 2,172 | 15 | 2,187 |
| Total Latin America | 2,787 | 18 | 2,805 |

TABLE 5A
LANDED TOURISTS BY SCHEDULED & CHARTERED AIRLINES

| JANUARY 2017 | | | |
|-------------------------------|-------------------------------|-------------------------------|----------------------------|
| | SCHEDULED AIRLINES | CHARTERED AIRLINES | TOTAL STOPOVERS |
| <u>CARIBBEAN</u> | | | |
| Antigua | 138 | 1 | 139 |
| Bahamas | 394 | 2 | 396 |
| Barbados | 266 | 5 | 271 |
| Bermuda | 197 | 1 | 198 |
| British Virgin Is. | 48 | 0 | 48 |
| Cayman Is. | 1,052 | 2 | 1,054 |
| Dominica | 27 | 0 | 27 |
| Grenada | 34 | 0 | 34 |
| Guyana | 104 | 0 | 104 |
| Montserrat | 5 | 0 | 5 |
| St. Kitts/Nevis/Anguilla | 68 | 0 | 68 |
| St. Lucia | 46 | 0 | 46 |
| St. Vincent | 55 | 0 | 55 |
| Turks & Caicos Is. | 246 | 2 | 248 |
| Trinidad & Tobago | 805 | 5 | 810 |
| Comm. Caribbean | 3,485 | 18 | 3,503 |
| Aruba | 27 | 0 | 27 |
| Cuba | 32 | 154 | 186 |
| Curacao | 49 | 2 | 51 |
| Dominican Republic | 163 | 0 | 163 |
| Guadelope | 8 | 0 | 8 |
| Haiti | 15 | 0 | 15 |
| Puerto Rico | 64 | 3 | 67 |
| St. Maarten | 68 | 0 | 68 |
| Surinam | 32 | 0 | 32 |
| All other Caribbean | 27 | 0 | 27 |
| Other Caribbean | 485 | 159 | 644 |
| TOTAL CARIBBEAN | 3,970 | 177 | 4,147 |
| <u>OTHER COUNTRIES</u> | | | |
| India | 107 | 0 | 107 |
| Pakistan | 1 | 0 | 1 |
| Japan | 188 | 0 | 188 |
| China | 260 | 3 | 263 |
| Taiwan | 11 | 0 | 11 |
| Korea | 60 | 0 | 60 |
| Philippines | 47 | 0 | 47 |
| Singapore | 13 | 0 | 13 |
| Other Asia | 33 | 5 | 38 |
| Asia | 720 | 8 | 728 |
| African Countries | 98 | 1 | 99 |
| Israel | 50 | 0 | 50 |
| Saudi Arabia | 2 | 0 | 2 |
| Turkey | 17 | 0 | 17 |
| Other Middle East | 57 | 6 | 63 |
| Australia | 269 | 2 | 271 |
| New Zealand | 26 | 2 | 28 |
| All Other Ctries | 3 | 0 | 3 |
| Total | 522 | 11 | 533 |
| GRAND TOTAL | 169,059 | 16,814 | 185,873 |

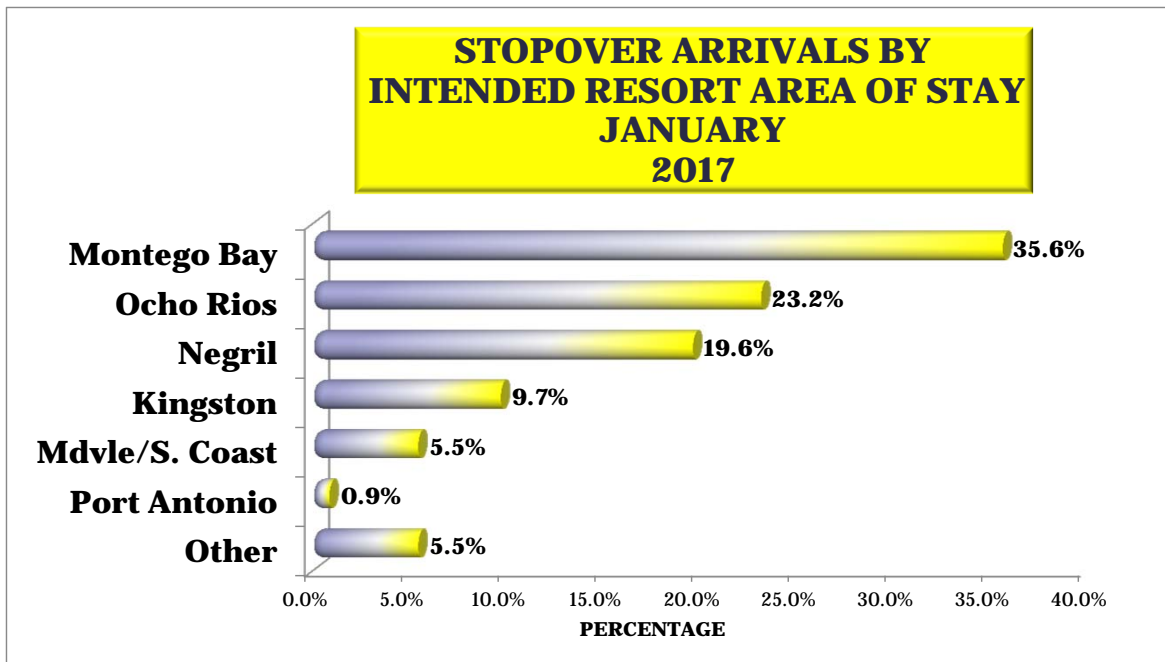


Fig. 5

STOPOVER ARRIVALS BY INTENDED AREA OF STAY

| Area | JANUARY | | | JANUARY | | | JANUARY | | | %Change 2017/16 ARRIVALS |
|----------------|----------------|---------------|-------------------|----------------|---------------|-------------------|----------------|---------------|-------------------|--------------------------------|
| | 2017 | %Share | LENGTH OF STAY | 2016 | %Share | LENGTH OF STAY | 2015 | %Share | LENGTH OF STAY | |
| Montego Bay | 70,533 | 37.9% | 7.6 | 63,980 | 35.6% | 7.6 | 60,675 | 34.4% | 7.6 | 10.2% |
| Ocho Rios | 41,664 | 22.4% | 8.7 | 41,574 | 23.2% | 8.6 | 39,353 | 22.3% | 8.6 | 0.2% |
| Negril | 35,162 | 18.9% | 8.9 | 35,257 | 19.6% | 8.8 | 40,039 | 22.7% | 8.9 | -0.3% |
| Kingston | 16,762 | 9.0% | 12.4 | 17,476 | 9.7% | 12.3 | 16,369 | 9.3% | 13.4 | -4.1% |
| Mdvle/S. Coast | 9,990 | 5.4% | 13.5 | 9,826 | 5.5% | 13.5 | 9,570 | 5.4% | 13.4 | 1.7% |
| Port Antonio | 1,659 | 0.9% | 16.1 | 1,611 | 0.9% | 16.1 | 1,484 | 0.8% | 14.6 | 3.0% |
| Other | 10,103 | 5.4% | 15.6 | 9,835 | 5.5% | 15.6 | 9,131 | 5.2% | 14.6 | 2.7% |
| Total | 185,873 | 100.0% | 9.4 | 179,559 | 100.0% | 9.3 | 176,621 | 100.0% | 9.4 | 3.5% |