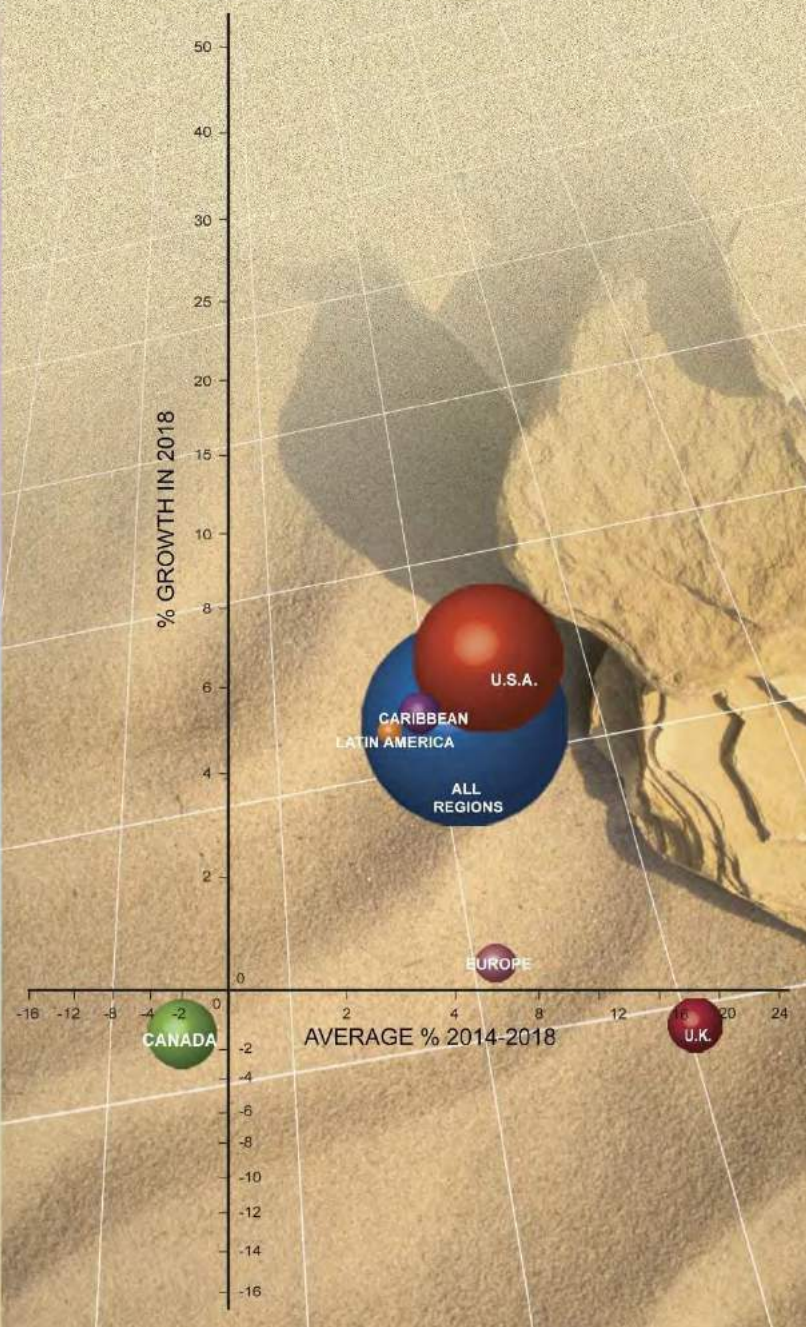


JAMAICA

TOURIST BOARD

Annual Travel Statistics 2018



www.visitjamaica.com

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DEFINITIONS

VISITORS : Any person visiting a country other than the one in which he/she normally resides, for not more than **one** year, and whose purpose of visit can be classified under one of the following headings:

Leisure: recreation, holiday, health, study, religion, sport, visit family/friends;

Business: conference, meeting and mission.

There are two types of visitors: tourists and excursionists.

TOURISTS : A visitor staying at least 24 hours in the country.

STOPOVERS : The same as "**tourists**".

NON-RESIDENT JAMAICANS : Any Jamaican National whose usual residence is outside of Jamaica and whose purpose of visit can be classified under the headings previously mentioned above.

EXCURSIONISTS : Any visitor staying less than 24 hours in the country.

CRUISE PASSENGERS : A special type of excursionist travelling by cruise ships.

ARMED FORCES : Personnel of the Naval Armed Forces of foreign countries who take onshore leave in Jamaica.

LENGTH OF STAY : The "**length of stay**" refers to the intended length of stay as given by the visitors.

INTRODUCTION

The statistics contained in this publication cover visitor arrivals, accommodation utilization, and visitor expenditure.

Tourism data from all the Embarkation/Disembarkation (E/D) Cards were entered in a computer system located at the Corporate Head Office, Jamaica Tourist Board, Kingston. The data on stopovers, including demographics, were derived from this source.

Jamaican nationals' resident abroad and who visited Jamaica are included in the visitor arrival figures. Jamaica has conformed to the "**Recommendations on Tourism Statistics**" prepared by the World Tourism Organization and adopted by the United Nations Statistical Commission (UNSC) in 1993.

These recommendations state that **nationals who reside abroad and who return as visitors should be included in Tourism Statistics**. The Jamaica Tourist Board has been publishing visitor arrival figures on Non-Resident Jamaicans since 1989.

Fly-cruise passengers i.e. Cruise Passengers flying into the island to meet the cruise ship are not included in tourist arrival figures, unless they spend at least one night in land-based accommodation.

Data on cruise ship arrivals were obtained from the ships' manifests.

Visitor accommodation figures such as hotel occupancy rates, room capacity, employment in accommodation, were collected directly from the establishments. Estimates were made, using E/D card information, for some non-compliant properties.

Information on visitor expenditure was obtained from an Exit survey conducted among departing visitors at both international airports and at the cruise ship piers.

The Research & Market Intelligence Unit of the Marketing Department is thankful for all the assistance and support given by the other tourism entities and their staff who provided the data and/or material for this issue.

Acknowledgments and appreciations are extended to the Data Entry staff and Research Assistants who assisted with the data collection process.

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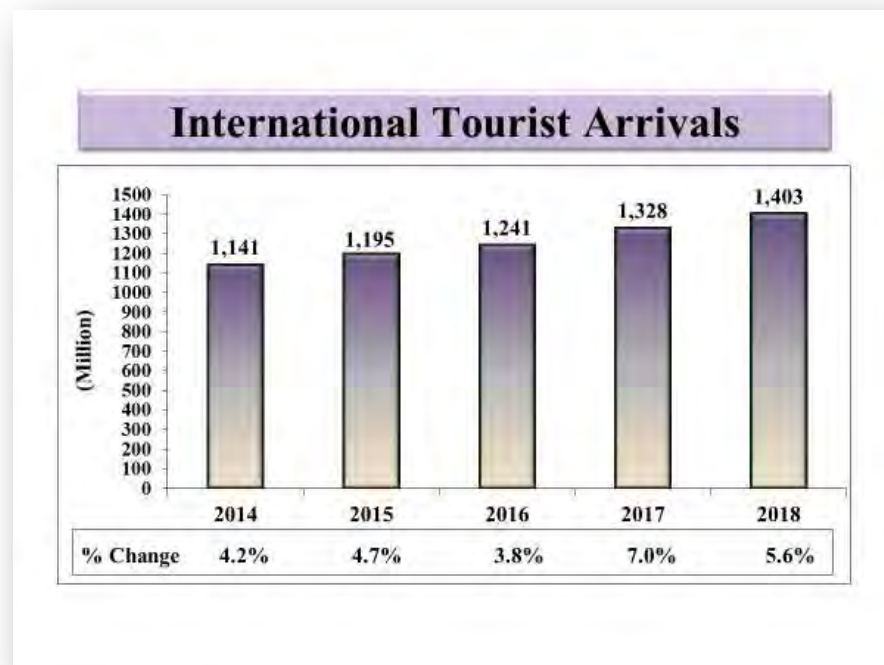
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INTERNATIONAL

The year 2018 continued to record a strong growth trend in international travel worldwide. It followed a consolidation of the strong results of 2017 (+7%) and was well above the sustained and consistent trend of 4% or higher growth since 2010. The World Tourism Organization (UNWTO) reported that international tourist arrivals grew by 5.6% in 2018 compared to the same period in 2017, reaching a high of 1,403 million.¹



Source: World Tourism Organization (UNWTO)

international tourists raising the total to 217.3 million. Growth was driven by North America posting a growth of 4.9%, with 143.9 million arrivals.

As a result, over 451 million more international tourists travelled the world in 2018 as compared to the 952 million international tourists in 2010.

All world regions recorded growth in international tourist arrivals for 2018. The strongest growths were registered in Africa, Asia and the Pacific, and Europe, with 7.0%, 6.5% and 6.1% respectively. At somewhat lower rate of growth was recorded for the Middle East, with 3.8%, and the region with the lowest rate of growth, the Americas, with 3.1%. Europe, the most visited region with over half the world's international tourist, saw an increase of 40.9 million arrivals in 2018, reaching a total of 713.4 million. The second most visited region in the world, Asia and the Pacific increased by 21.1 million more arrivals to a total of 345.1 million. The Americas, to which Jamaica is a part, with a growth of 3.1%, welcomed an additional 6.5 million

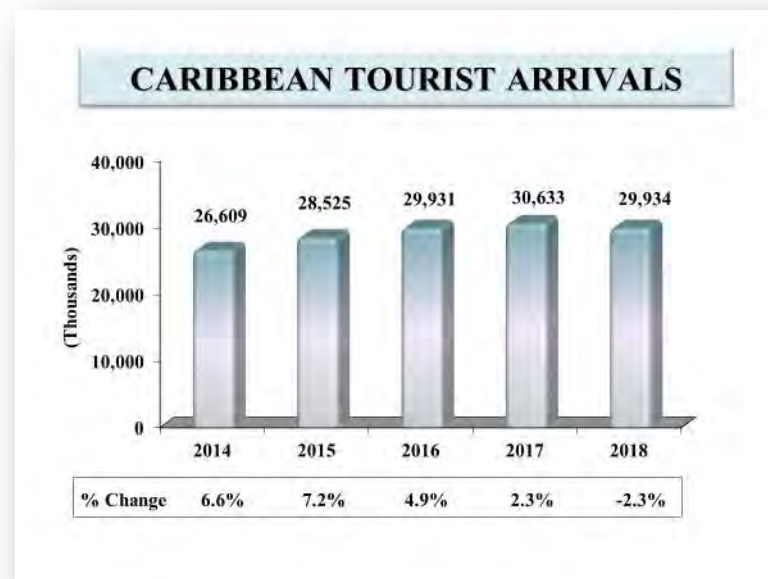
¹ UNWTO World Tourism Barometer – Volume 17 May 2019.

CARIBBEAN

The Caribbean Tourism Organization (CTO) reported that in 2018 there was mixed results in demand for travel to the region and an estimated 29.9 million visitors came to ‘enjoy the un-equalled and diverse experiences’ the Caribbean had to offer. This was approximately 700 thousand less tourist arrivals, a 2.3% decrease over the 30.6 million in 2017 ²

The Caribbean region continues to demonstrate that it’s diversity of cultures to its authentic natural experiences, offered numerous enjoyable, refreshing and relaxing encounters. Although some of the Northeastern island destinations, particularly Puerto Rico, St. Maarten, the Virgin Islands, struggled with the effects of a very active hurricane season, the Dominican Republic, Cuba, Jamaica and the Bahamas showed continued growth from their main source markets in the Americas and Europe. The United States remained the most important supplier of tourists to the region even with a negative growth of 6.3% decrease in arrivals. Over 13.9 million Americans visited the region with most arriving in Dominican Republic, Jamaica, and The Bahamas.

Arrivals from Canada increased by 5.7%, and European arrivals showed a modest increased growth of 1.3%, while Intra-regional travel was a strong 5.3% increase.



The Caribbean Cruise sector is estimated to have increased by an estimated 6.7% in passenger arrivals during 2018 to over 28.9 million. Eighteen of the twenty-four destinations recorded increased cruise activity in 2018 over 2017. The Bahamas Islands, Cozumel, Cayman Islands, Jamaica and Puerto Rico,

CARIBBEAN TOURISM PERFORMANCE BY MAIN MARKET REGIONS						
MAJOR MARKET	2014	2015	2016	2017	2018	%CH.
USA	13,371.3	14,322.8	14,781.8	14,882.1	13,939.5	-6.3%
CANADA	3,279.7	3,421.2	3,314.0	3,712.6	3,923.9	5.7%
EUROPE	4,876.6	5,088.4	5,596.0	5,935.3	6,010.2	1.3%
CARIBBEAN	1,587.4	1,684.9	1,863.0	1,873.3	1,972.6	5.3%
SOUTH AMERICA	1,745.5	2,018.7	1,823.1	1,787.0	1,851.3	3.6%
OTHER	1,748.0	1,988.6	2,553.3	2,442.9	2,236.0	-8.5%
TOTAL TOURIST ARRIVALS ('000)	26,608.5	28,524.6	29,931.2	30,633.2	29,933.5	-2.3%
Source Caribbean Tourism Organization						

² Caribbean Tourism performance review 2018.

are the top five most popular Caribbean Cruise ship destinations within the region, which is 50.5% of the market and representing 13.7 million passengers.

A subset of the cruise passenger arrivals in 2018 are compared with 2017 figures³.

Cruise Passenger Arrivals - 2017 & 2018			
Destination	2017	2018	% Change
Bahamas	4,626.3	4,877.6	5.4%
Cozumel (Mexico)	4,103.8	4,265.5	3.9%
Cayman Islands	1,728.4	1,921.1	11.1%
Jamaica	1,923.3	1,845.9	-4.0%
Puerto Rico	1,229.1	1,658.8	35.0%
St. Maarten	1,237.8	1,597.1	29.0%
US Virgin Islands	1,317.2	1,430.7	8.6%
Belize	1,014.2	1,208.1	19.1%
St. Kitts & Nevis	1,062.5	1,142.1	7.5%
Turks & Caicos Islands	827.4	1,021.7	23.5%
Dominican Republic	1,108.0	982.3	-11.3%
Haiti	795.4	885.2	11.3%
Aruba	792.4	815.2	2.9%
Antigua and Barbuda	792.9	792.9	0.0%
St. Lucia	668.0	760.3	13.8%
Curacao	634.4	757.3	19.4%
Barbados	681.2	675.8	-0.8%
Bermuda	418.0	484.3	15.9%
Martinique	405.6	392.6	-3.2%
Grenada	299.4	342.8	14.5%
Source: CTO data supplied by member countries			

³ Caribbean Tourism performance review 2018

Summary of Main Indicators 2018

PERCENTAGES ARE % CHANGE COMPARING 2018 AND 2017

STOPOVER ARRIVALS 2,272,727	5.1%	↑
FOREIGN NATIONAL 2,298,162	4.6%	↑
NON-RESIDENT JAMAICANS 174,565	11.5%	↑

STOPOVER ARRIVALS PORT OF ARRIVAL		
MONTEGO BAY 2,012,381	5.3%	↑
KINGSTON 460,346	4.3%	↑

TOTAL ARRIVALS 4,318,608	1.0%	↑
---------------------------------	-------------	---

CRUISE ARRIVALS 1,845,873	-4.0%	↓
OCHO RIOS 586,715	7.9%	↑
MONTEGO BAY 512,563	-2.8%	↓
FALMOUTH 744,671	-11.9%	↓

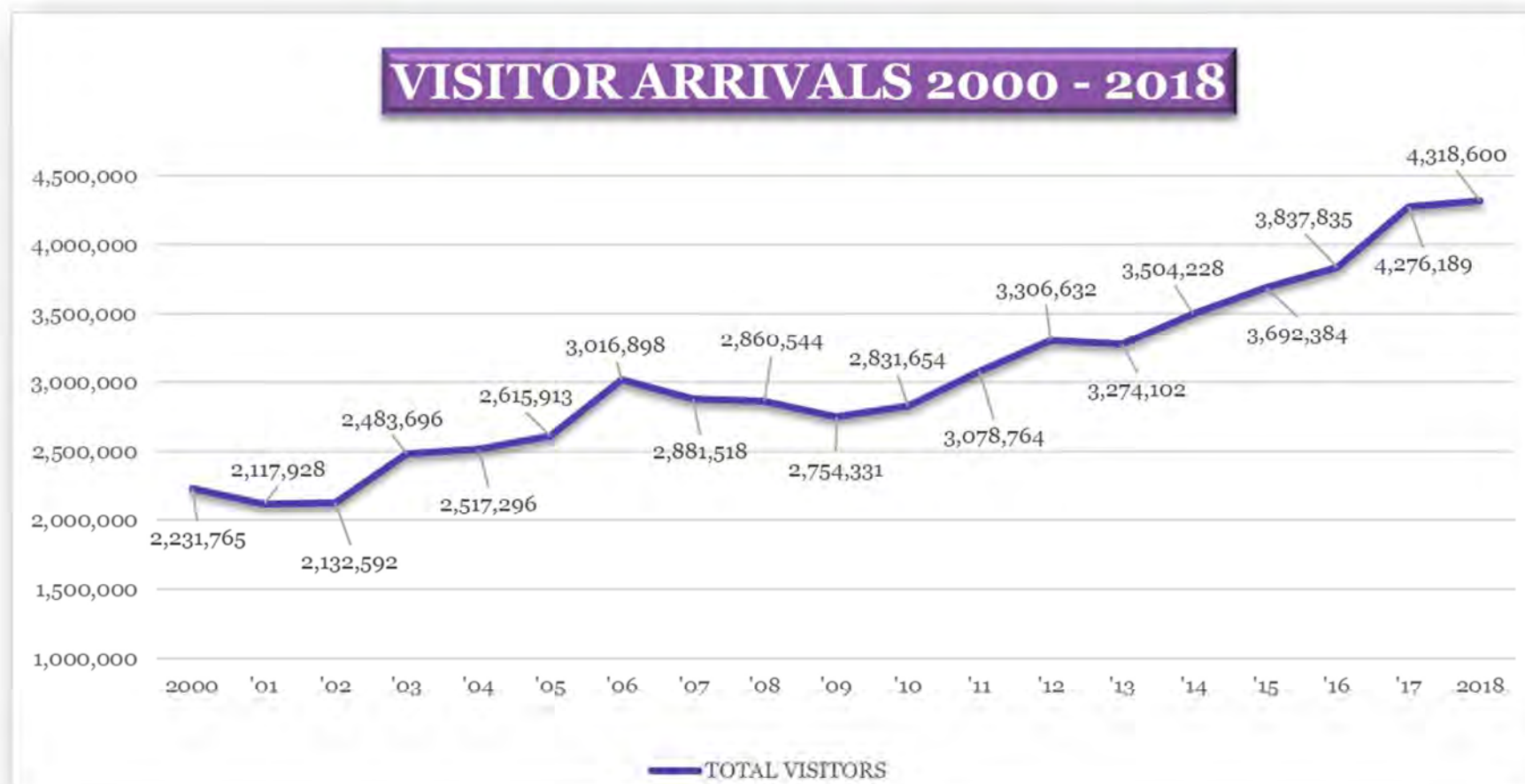
STOPOVER ARRIVALS		% Change	% Share
UNITED STATES 1,628,402	↑	7.8%	65.9%
CANADA 399,969	↓	-1.3%	16.2%
EUROPE 328,369	↑	0.8%	13.3%
CARIBBEAN 67,495	↑	5.6%	2.7%
LATIN AMERICA 33,922	↑	5.3%	1.4%
ASIA & PACIFIC 7,977	↓	-14.2%	0.3%
OTHER COUNTRIES 6,593	↑	1.2%	0.3%

**AVERAGE LENGTH OF STAY IN
ALL ACCOMMODATIONS**
8.1 NIGHTS
HOTELS
6.2 NIGHTS

AIR CAPACITY
3,669,827 SEATS 6.2% ↑

TOURIST ACCOMMODATIONS 32,797 ROOMS	3.0%	↑
HOTELS ROOMS 25,091	3.9%	↑
% HOTEL ROOM OCCUPANCY 66.9%	3.1%	↑
EMPLOYMENT IN ACCOMMODATION 50,113	3.5%	↑

TOTAL VISITOR EXPENDITURE (STOPOVER & CRUISE) US\$ 3,305M	9.8%	↑
STOPVERS US\$ 3,121M	10.4%	↑
CRUISE US\$ 184M	7.9%	↑



TOTAL ARRIVALS

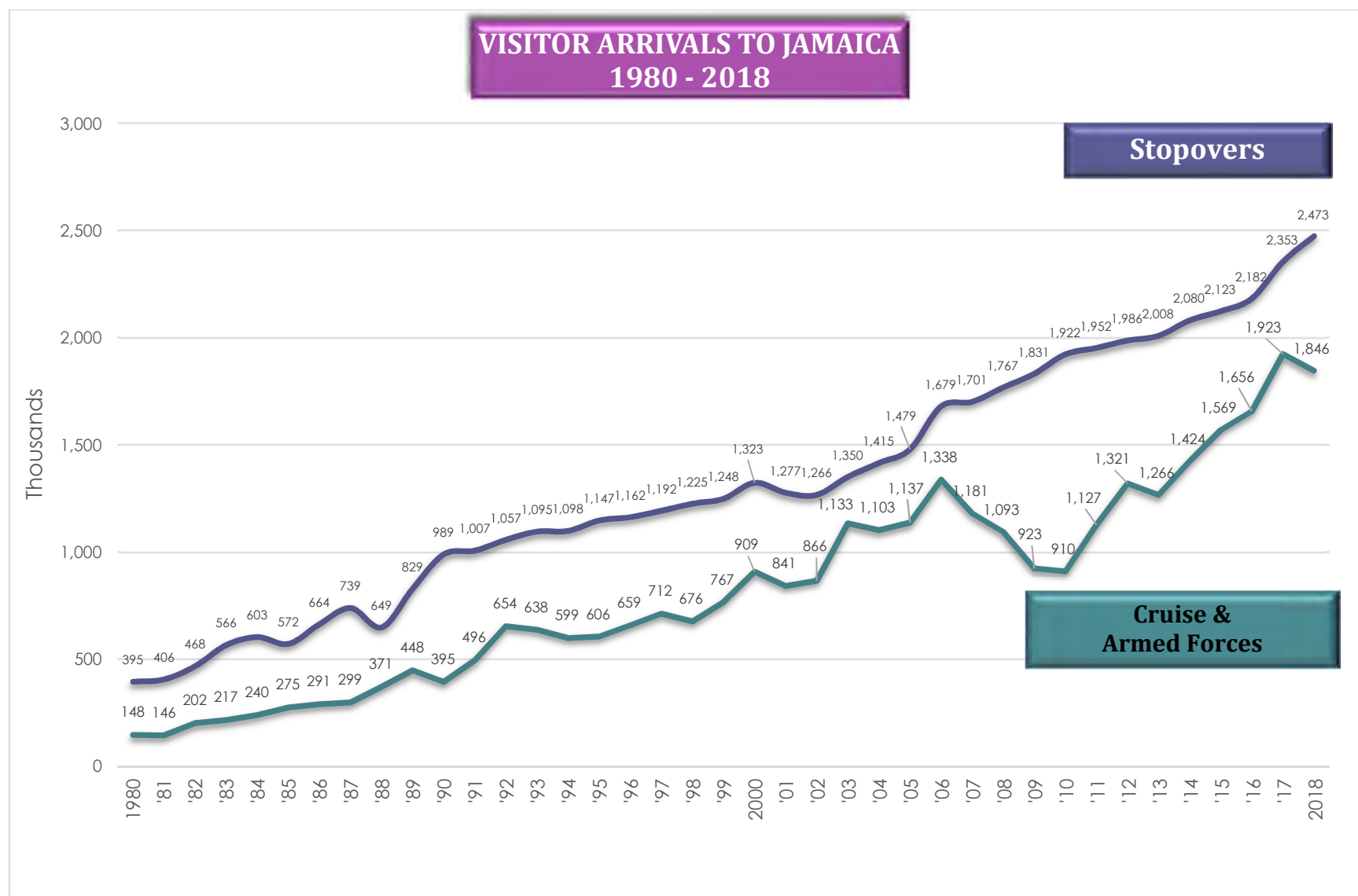
Total visitor arrivals for the year 2018 reached another record of 4,318,600, which was 1.0% above the 4,276,189 arrivals recorded in 2017. This figure represents 42,422 more arrivals than in 2017. In the first quarter of 2018, Jamaica recorded a 6.6% growth in stopover arrivals over the 2017 figures. During the second quarter this growth slip to 4.4% and in the third quarter this growth moved down to 3.5%. In the last and final quarter of 2018, this growth fell again to 4.0%.

The main factors that may be identified as having had an impact on Jamaica’s stopover arrivals during 2018 were as follows:

- The Jamaica Tourist Board adjusted its advertising portfolio which saw a greater emphasis placed on Digital Marketing.
- The advertising campaign the “Join Me in Jamaica” campaign was developed to show the authentic personas and experiences a visitor can have on island. It was a series of videos that included international artists, cultural attractions and artisans among other who helped to push and solidify the message of destination Jamaica.
- Jamaica’s destination website continued to be used as the primary “call to action” for advertisements and promotion. The website is a repository of destination activities, accommodations, and the unique elements that make the island appealing to the traveler. To better manage and coordinate content posted on the Board’s social media platform, regional Facebook pages were merged to the social media giant’s global Facebook to allow the board to share content across territories as appropriate.
- Sales activities continued to be an integral link with travel trade partners in the marketplace. These facilitated one-on-one as well as group interactions with travel agents and tour operators who drive tourism business to Jamaica.
- Maintaining adequate airlift from the major gateways within Jamaica’s key tourism generating regions.
- A number of new and re-branded hotels opened in 2018, resulting in the availability of more rooms.
- On-island Travel Agents’ Familiarization tours with reps from the USA, Canada, Europe and Latin America, continued to educated travel agents on the Jamaican Tourism Product.

Destination Jamaica continues to offer a diverse product of very high quality to its visitors, through its expansive and inclusive nature in 2018. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations, unequaled visitor experiences and provide value for money.

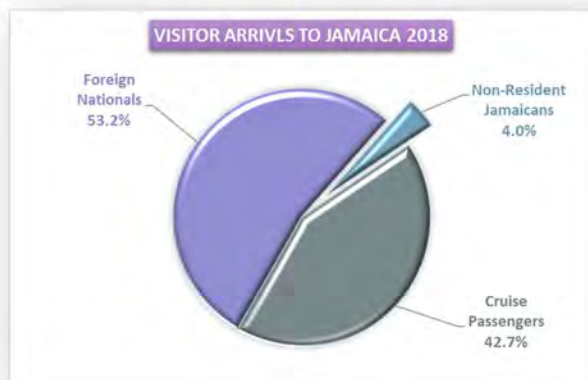
Visitor Arrivals over the years



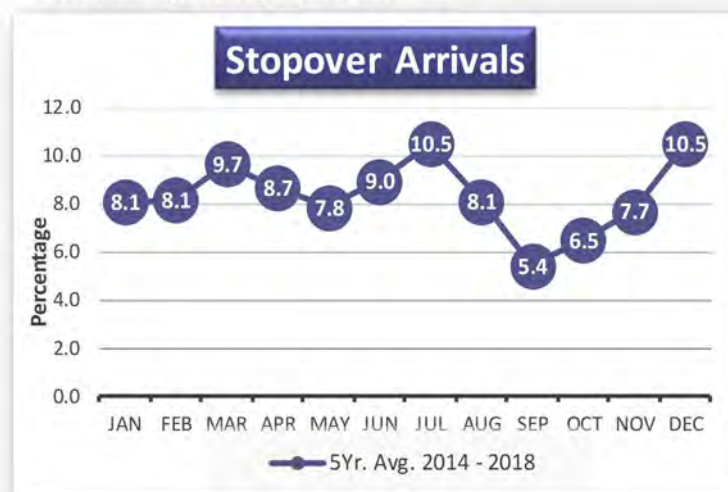
Stopover arrivals of 2,472,727 increased by 5.1%. Foreign National of 2,298,162 increased by 4.6%. Non-Resident Jamaicans of 174,565 increased by 11.5%. Cruise passenger arrivals of 1,845,873 decreased by 4.0%.

Stopover Arrivals by Month and Year of Arrival 2014 - 2018

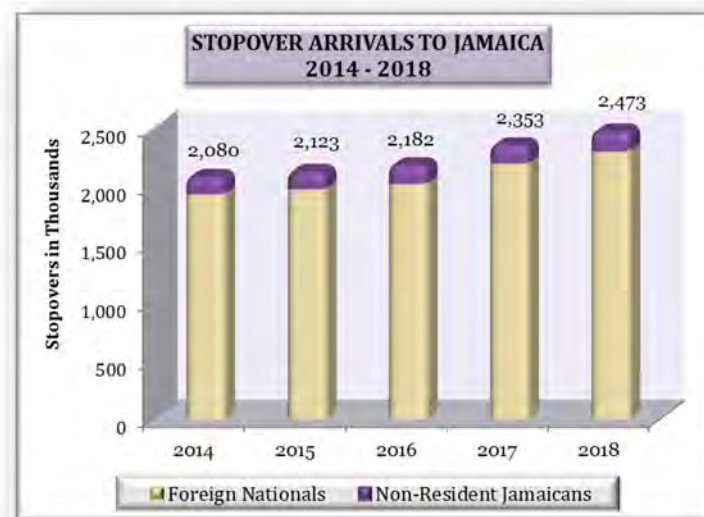
	2014	2015	2016	2017	2018
January	169,280	176,621	179,559	185,873	194,609
February	169,328	177,805	185,272	186,670	193,575
March	200,732	212,134	219,673	212,600	236,818
April	181,664	189,903	188,604	205,822	204,734
Jan.-Apr.	721,004	756,463	773,108	790,965	829,736
May	166,249	168,347	167,884	181,669	195,491
June	187,083	182,364	194,088	211,119	229,261
July	221,006	220,662	228,169	248,626	257,050
August	171,486	169,063	169,023	192,878	206,034
September	106,757	114,280	120,340	131,416	134,910
October	135,730	134,317	135,467	157,380	162,552
November	157,737	158,450	163,152	187,062	196,546
December	213,129	219,096	230,453	251,800	261,147
May - Dec.	1,359,177	1,366,579	1,408,576	1,561,950	1,642,991
Jan. - Dec.	2,080,181	2,123,042	2,181,684	2,352,915	2,472,727
% Inc./Dec.	3.6	2.1	2.8	7.8	5.1



Seasonality of Stopover Arrivals



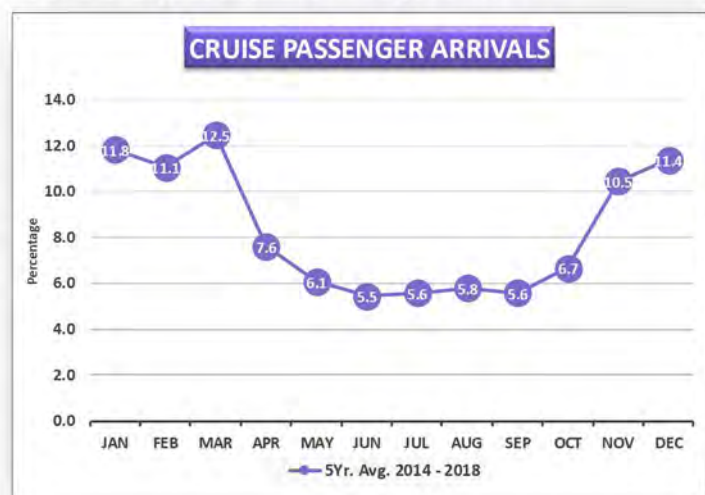
Stopover Arrivals by Type of Visitor



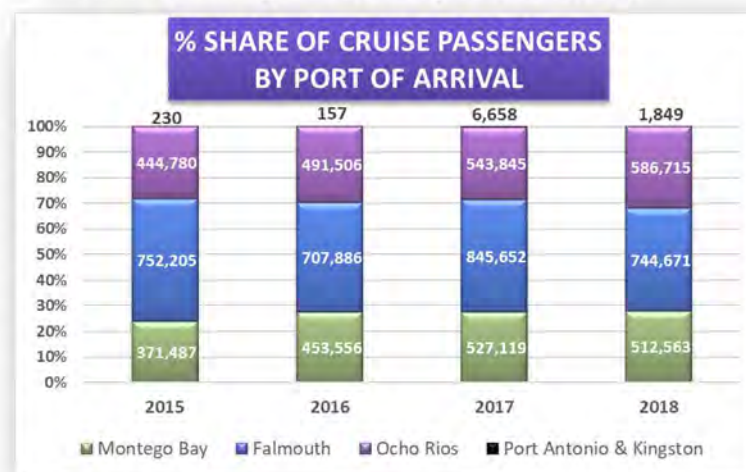
Cruise Passenger Arrivals by Month and Year of Arrival 2014 – 2018

	2014	2015	2016	2017	2018
January	160,945	167,591	186,741	205,812	249,635
February	131,948	150,803	197,467	192,664	210,667
March	149,158	194,031	229,111	234,251	213,193
April	146,640	142,139	131,898	141,792	139,282
Jan.-Apr.	588,691	654,564	745,217	774,519	812,777
May	76,865	87,707	94,577	110,712	124,781
June	79,447	89,162	110,086	93,453	92,323
July	104,123	100,150	88,015	110,034	104,127
August	93,106	95,962	99,677	109,074	105,827
September	69,001	88,968	86,033	132,551	84,228
October	106,813	87,719	90,233	150,076	121,975
November	125,509	135,450	159,383	234,643	173,291
December	180,242	229,020	182,341	208,212	226,544
May - Dec.	835,106	914,138	910,345	1,148,755	1,033,096
Jan. - Dec.	1,423,797	1,568,702	1,655,562	1,923,274	1,845,873
% Inc./Dec.	12.5%	10.2%	5.5%	16.2%	-4.0%

Seasonality of Cruise Passenger Arrivals



Cruise Passenger Arrivals by Port of Arrival

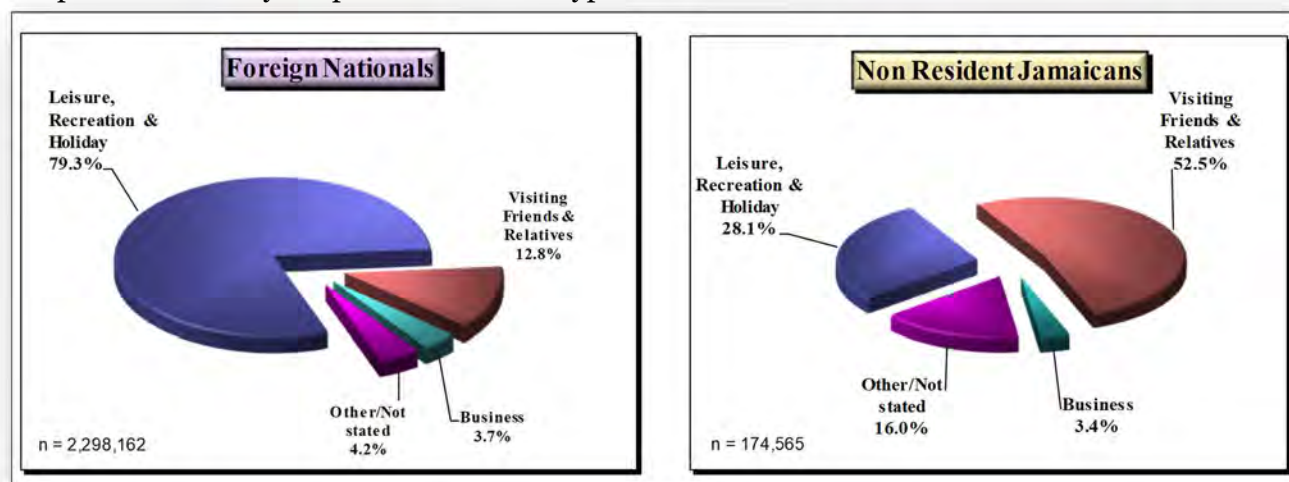


See page 20 for further insight

Stopover Arrivals by Purpose of Visit and Year of Arrival 2014 – 2018

	2015		2016		2017		2018	
	No.	% Share	No.	% Share	No.	% Share	No.	% Share
Leisure, Recreation and Holiday	1,604,302	75.6	1,599,129	73.3	1,780,512	75.7	1,867,662	75.5
Visiting Friends & Relatives	293,693	13.8	360,167	16.5	362,962	15.4	385,046	15.6
Business	100,839	4.7	98,424	4.5	92,066	3.9	91,648	3.7
Other/not stated	124,208	5.9	123,964	5.7	117,375	5.0	128,371	5.2
Total	2,123,042	100.0	2,181,684	100.0	2,352,915	100.0	2,472,727	100.0

Stopover Arrivals by Purpose of Visit and Type of Visitor



Stopover Arrivals by Purpose of Visit and Main Market 2018

PURPOSE OF VISIT 2018	USA		Canada		UK/Ireland	
	No.	% Share	No.	% Share	No.	% Share
Leisure, Recreation and Holiday	1,250,896	76.8	326,636	81.7	143,406	65.8
Visiting Friends & Relatives	249,876	15.3	51,973	13.0	53,965	24.8
Business	44,141	2.7	7,503	1.9	7,940	3.6
Other/not stated	83,489	5.1	13,858	3.5	12,668	5.8
Total	1,628,402	100.0	399,969	100.0	217,978	100.0

MARKET PERFORMANCE

UNITED STATES

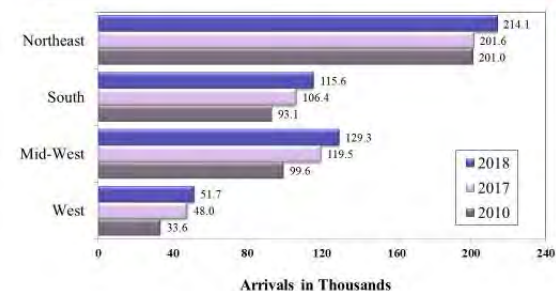
Travel by 41.8 million US citizens during January and December 2018 to overseas regions indicates that outbound travel from the USA increased by 9.0% when compared to outbound travel during the corresponding period in 2017. Travel to the Caribbean region increased by 4.6% during this period also, reflecting a market share of 20.8% of the USA outbound travel market overseas. Of the 93 million total outbound travelers for 2018, 51.3 million traveled to Canada and Mexico.⁴

Pertaining to Jamaica, during the winter season (Jan. – Apr.), stopover arrivals in 2018 were 7.4% higher than those in 2017 and 19.5% higher than in 2010. In comparison to the 2017 winter season, stopover arrivals from all market regions recorded increase in arrivals; the Northeast grew by 6.2%, the South by 8.6%, the Midwest by 8.2% and the West 7.6%.

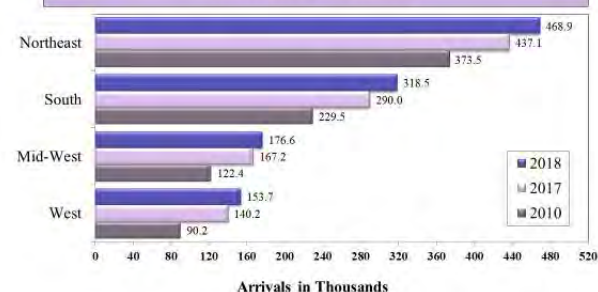
For the summer period (May – Dec.), the US market grew by 8.1% when compared to 2017 and rose 37.0% over 2010. A total of 1,117,800 stopover arrivals came during summer. The strongest growth was recorded in the South region, with 318,545 arrivals up 9.8%, followed by the West region where the least US arrivals originate from, with 153,703 arrivals, grew by 9.6%. The Northeast region where most US arrivals originate from, recorded 468,906 arrivals up 7.3% and the Midwest region, with 176,646 arrivals, recorded an increase of 5.7%.

The Northeastern and Southern regions contributed 68.6% of the US stopover visitors to Jamaica during 2018. This represents 3.6 percentage points less than its 72.2% contribution in 2010. The Midwest region contributed 18.8% of the stopover arrivals and the remaining 12.6% of the stopover visitors came from the Western region. The Northeast market region with 682,966 arrivals increased by 6.9%, the South with 434,137 arrivals increased by 9.5%, the Midwest with 305,937 grew by 6.7% and the Western region with 205,362 increased by 9.1%. Overall, arrivals from the USA market increased 7.8% in 2017 with 1,628,402 over the 1,509,963 stopovers in 2017. This performance was 15.8% more arrivals than the 1,406,058 arrivals recorded in 2016 and 21.1% more than the 1,344,149 in 2015.

STOPOVER ARRIVALS FROM U.S.A. Winter Season

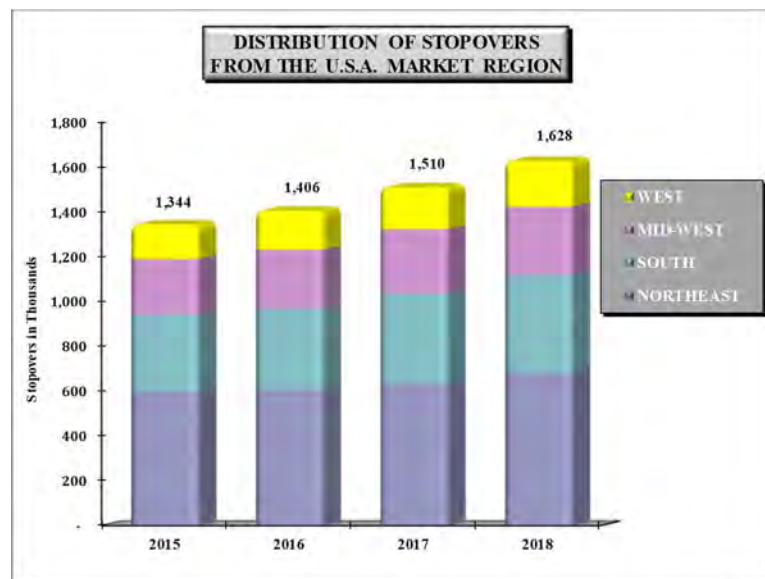


STOPOVER ARRIVAL FROM U.S.A. Summer Season



⁴ U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries “U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico Feb. 2019”

USA Visitor Summary



U.S.A. Regions	Stopovers in Thousands								%Change 2018/17
	2015 % Share		2016 % Share		2017 % Share		2018 % Share		
Northeast	598.5	44.5	605.1	43.0	638.7	42.3	683.0	41.9	6.9
South	344.0	25.6	365.0	26.0	405.1	26.8	434.1	26.7	7.2
Mid-West	247.3	18.4	260.6	18.5	286.7	19.0	305.9	18.8	6.7
West	154.4	11.5	175.4	12.5	179.5	11.9	205.4	12.6	14.4
Total	1,344.1	100.0	1,406.1	100.0	1,510.0	100.0	1,628.4	100.0	7.8

Seasonality of Stopover Arrivals



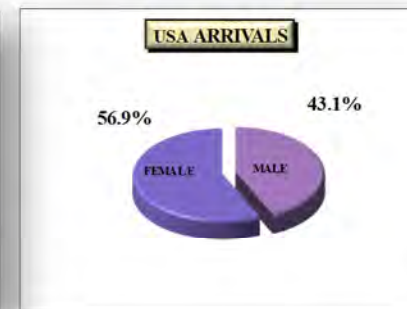
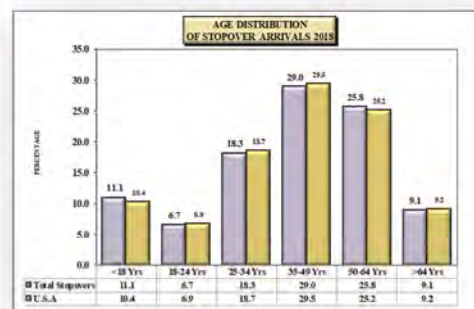
The average length of stay for Foreign Nationals US visitors in 2018 was 6.8 nights, which is lower than the average of 8.1 nights for all visitors.

In 2018 a total of 1,250,896 or 76.8% of US visitors came to Jamaica for leisure, recreation and holiday, 249,876 or 15.3% came to visit friends & relatives, 44,141 or 2.7% on business and 83,489 or 5.1% for other or unstated purposes.

The annual average growth rate for visitors from the USA over the past five years from 2014 to 2018 was 5.9%.

In 2018 the age distribution of US stopover visitors indicated that 10.4% were aged less than 18 years, 6.9% were between 18 and 24 years, 48.2% were between 25 and 49 years, 25.2% were between 50 and 64 years and 9.2% were over 64 years.

The Gender mix of visitors from USA, were 702,201 males (43.1%) and 926,201 females (56.9%). The gender ratio of visitors from the USA is 122 females per 100 males.



The peak periods of US stopover visitors to Jamaica in 2018 were: Summer (June – July), Easter (March- April) and Christmas (December). The months with the highest numbers of stopover arrivals in 2018, in descending order, were: July, June, December, March and April. This pattern has been holding strong for the past five years (2014 – 2018).

The most popular resort region to which US stopover visitors stayed in 2018 was Montego Bay with 608,667 or 37.4% of US visitors. 22.2% or 361,395 of the US visitors stayed in Ocho Rios and 18.0% or 293,541 stayed in Negril.

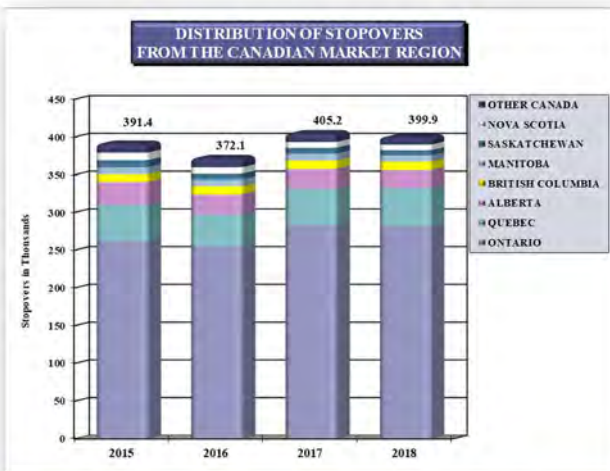
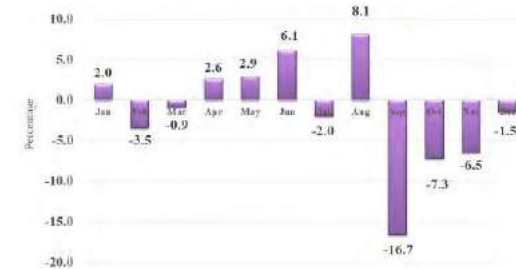
CANADA

Outbound trips reached an estimated 33.440 million in 2018⁵. Arrivals from Canada in 2018 totaled 399,969 representing 5,205 fewer Canadian visitors to Jamaica than in 2017, a 1.3% decrease.

The Canadian market during the (January – April), winter period, was at the same level as in 2017. A total of 172,052 stopovers came from that market compared to 172,077 in winter 2017. This is still 39,873 stopovers below the record number of 211,925 that came in the winter of 2012. Two months of winter recorded increases: January (2.0%) and April (2.6%), while February (3.5%) and March (0.9%) recorded declines.

This up and down trend continued during the summer period (May – December), with a total of 227,917 stopovers arrivals, compared to the 233,097 arrivals in summer of 2017. The growth rates ranged from a high of 8.1% in the month of August to a low of -16.7% in the month of September.

Monthly % Change in Stopover Arrivals from Canada 2018 / 2017



Provinces	Stopovers in Thousands							
	2015	%Share	2016	%Share	2017	%Share	2018	%Share
ONTARIO	261.9	66.9	255.1	68.5	283.3	69.9	281.6	70.4
QUEBEC	48.8	12.5	42.3	11.4	48.5	12.0	51.2	12.8
ALBERTA	29.7	7.6	26.5	7.1	26.1	6.4	23.6	5.9
BRITISH COLUMBIA	10.3	2.6	10.9	2.9	11.0	2.7	11.1	2.8
MANITOBA	9.4	2.4	8.9	2.4	9.2	2.3	8.2	2.0
NOVA SCOTIA	9.9	2.5	8.4	2.2	7.5	1.9	7.3	1.8
SASKATCHEWAN	9.3	2.4	7.9	2.1	7.8	1.9	6.9	1.7
OTHER CANADA	12.3	3.1	12.3	3.3	11.8	2.9	10.1	2.5
Total	391.4	100.0	372.2	100.0	405.2	100.0	400.0	100.0

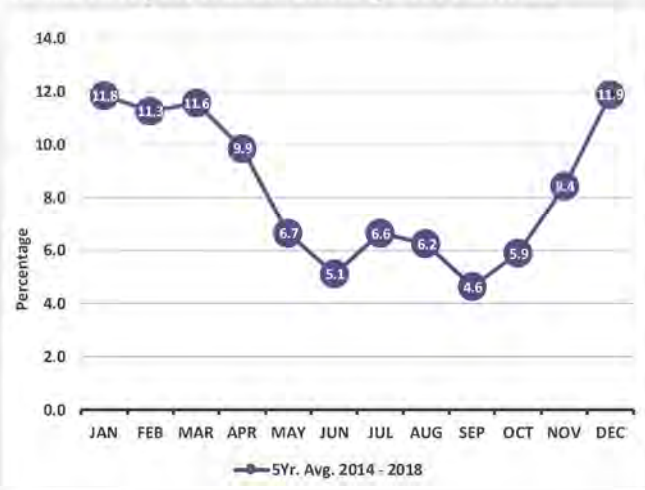
The main province of Ontario contributed 281,552 or 70.4% to the Canadian stopover arrival total, which was a decrease of 0.6% over the 283,294 who came from that province in 2017. Quebec, the second leading visitor producing province, (with 12.8% of the visitors), produced 5.6% more stopovers. The other two leading provinces, Alberta declined by 9.2%, and British Columbia increased by 1.3% in 2018 compared to 2017.

Canada Visitor Summary

- The average length of stay for Foreign National Canadian visitors in 2018 was 8.6 nights.
- In 2018 a total of 326,636 or 81.7% of Canadian visitors came to Jamaica for leisure, recreation and holiday 51,973 or 13.0% came to visit friends & relatives, 7,503 or 1.9% came on business, and 13,858 or 3.5% came for other or unstated purposes.
- The annual average growth rate for visitors from the Canadian region over the past five year, from 2014 to 2018 was negative 1.2%.

⁵ Canadian Tourism Commission (December 2018). Tourism Snapshot: A Monthly Monitor of the Performance of Canada's Tourism Industry Vol, 14, Issue 12

Seasonality of Canadian Stopover Arrivals

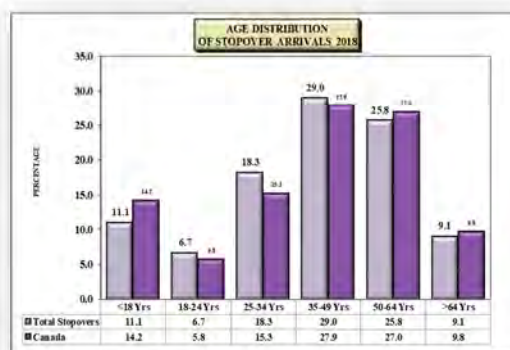


- The most popular resort regions to which Canadian visitors stayed in 2018 was Montego Bay with a total of 139,972 or 35.0% of Canadian visitors, 28.5% or 113,853 Canadian visitors stayed in Ocho Rios and another 20.3% or 81,154 stayed in Negril.

- January through March and December are the peak months for visitor arrivals from Canada in 2018. This coincides with the cold winter climate experienced in Canada during this period

- In 2018 the age distribution shows 13.7% were aged under 18 years, 5.7% were between 18 – 24 years, 43.6% were between 25 – 49 years, 27.5% were between 50 – 64 years and 9.5% were 65 and over.

- The Gender mix of visitors from Canada, were 185,263 males (45.7%) and 219,911 females (54.3%). The gender ratio of visitors from Canada is 119 females per 100 males.



UNITED KINGDOM/EUROPE

The number of visits abroad by UK residents fell by 1.4% in 2018 from 72.8 million in 2017 to 71.8 million. This negative growth occurred in relation to a decline in visits to Europe which declined by 1.5%, Other Countries declined by 2.7%, while visit to North America grew by 2.5%.⁶

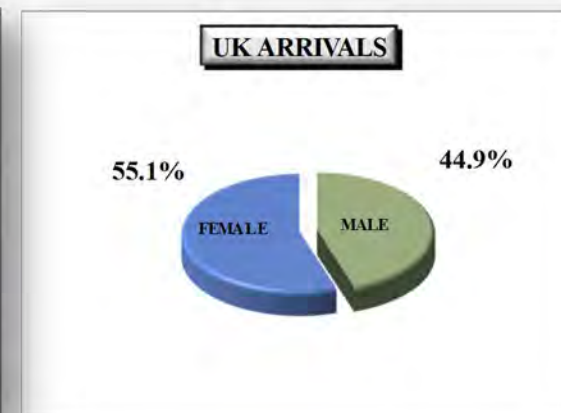
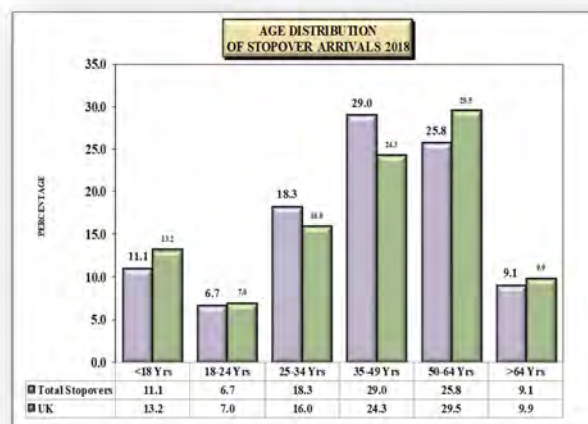
Stopover arrivals to Jamaica out of the European region recorded minimal growth in 2018. Arrivals from Europe increased by 0.8% in 2018, moving from 325,804 arrivals in 2017 to 328,369 arrivals in 2018. The United Kingdom, Germany, Italy and The Netherlands are the most important visitor producing countries within this regional market, in descending order of importance.

⁶ UK National Statistics – Travel Trends -2018, March 2019

United Kingdom Visitor Summary

- The United Kingdom, with 215,584 stopover arrivals, registered a decrease of 0.9% over the 217,647 recorded in 2017. The performance for winter was down by 3.0%. This trend continued in the summer with a slightly lower level of decreases to end the season at the same level as in 2017.
- July, August and December were the peak months for visitor arrivals from UK in 2018 with July being the highest month with 21,444 visitors.
- The average length of stay for Foreign National UK visitors in 2018 was 14.4 nights, which is higher than the average of 8.1 nights for all visitors.
- In 2018 a total of 143,406 or 65.8% of UK visitors visited Jamaica for leisure, recreation and holiday, 53,965 or 24.8% visited friends & relatives, 7,940 or 3.6% came on business, and 12,668 or 5.8% visited for other or unstated purposes.
- The annual average growth rate for visitors from the United Kingdom over the past five years from 2014 to 2018 was positive 8.7%.
- In 2018 the age distribution shows 13.2% were aged under 18 years, 7.0% were between 18 – 24 years, 40.3% were between 25 – 49 years, 29.5% were between 50 – 64 years and 9.9% were 65 and over.
- The Gender mix of visitors from UK, were 96,880 males (44.9%) and 118,704 females (55.1%). The gender ratio of visitors from the United Kingdom is 123 females per 100 males.
- The most popular resort regions to which UK visitors stayed in 2018 was Montego Bay with a total of 60,210 or 27.9% of UK visitors, 24.9% or 53,291 UK visitors stayed in Ocho Rios and another 19.6% or 42,201 stayed in Negril.

Seasonality of Stopover Arrivals from the United Kingdom



Europe

Countries	Stopovers in Thousands								%Change 2018/17
	2015	%Share	2016	%Share	2017	%Share	2018	%Share	
United Kingdom	199.0	71.2	206.5	70.1	217.6	66.8	215.6	65.7	-0.9
Germany	20.5	7.3	20.8	7.0	29.9	9.2	34.3	10.4	14.7
Italy	9.5	3.4	12.9	4.4	13.7	4.2	13.7	4.2	0.2
France	5.0	1.8	5.3	1.8	7.4	2.3	9.0	2.7	21.8
Netherlands	6.6	2.4	6.7	2.3	8.2	2.5	9.0	2.7	9.2
Spain	3.0	1.1	3.4	1.1	7.7	2.4	6.7	2.0	-12.4
Belgium	5.3	1.9	6.0	2.0	6.5	2.0	6.3	1.9	-2.5
Poland	1.3	0.5	2.5	0.9	5.2	1.6	5.0	1.5	-2.9
Sweden	8.7	3.1	10.6	3.6	7.7	2.4	5.0	1.5	-35.7
Other Europe	20.3	7.3	20.1	6.8	21.9	6.7	23.8	7.2	8.6
Total	279.3	100.0	294.7	100.0	325.8	100.0	328.4	100.0	0.8

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 34,255 stopover arrivals in 2018, the German market grew by a notable 14.7% over the 29,858 recorded in 2017. This is still below the peak of 43,018 German visitors recorded in 1998.

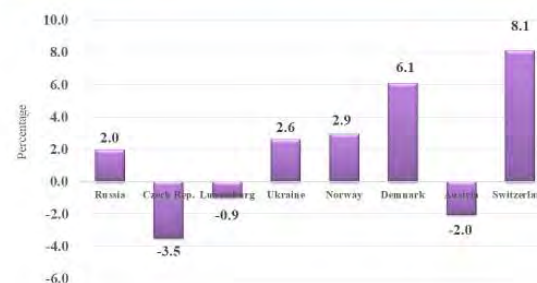
During 2018 Italy was the second main visitor producing country from Continental Europe with 13,721 arrivals, which was a growth of 0.2%; however, this is still below the 29,187 Italian arrivals recorded in 1992.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway and Sweden) represents 68.6 per cent of the total European market.

The performances of the other European countries albeit small numbers recorded mixed growth in 2018 compared to the corresponding period in 2017.

The average length of stay for Continental Europe as a group was 11.2 nights.

% Change in Stopover Arrivals from Selected European Countries 2018 / 2017



LATIN AMERICA

Latin America continues to be a market which holds much potential for Jamaica. Stopover arrivals out of the Latin American market region increased by 5.3%, moving up from 32,224 in 2017 to 33,922 in 2018 and 11.1% higher than in 2013 when the highest number of 30,538 arrivals were recorded.

The annual average growth rate for visitors from Latin America over the past five years from 2014 to 2018 was positive 3.8%.

July, August, January and May were the peak months for visitor arrivals from Latin America in 2018 with July being the highest month with 3,339 visitors.

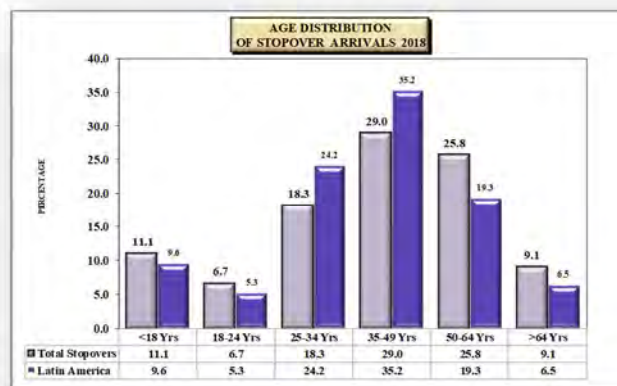
Of the top three visitor-producing countries in the South American sub-region, Argentina with 5,774 visitors increased by 4.1%; Chile with 5,480 visitors rose by 4.2%, and Brazil with 5,287 decreased by 0.3%.

From the Central American sub-region, Mexico with 3,866 visitors increased by 0.5%; Panama with 2,328 increased by 9.8%; and Costa Rica with 1,262 increased by 11.0%.

In 2018 the age distribution shows 13.2% were aged under 18 years, 7.0% were between 18 – 24 years, 40.3% were between 25 – 49 years, 29.5% were between 50 – 64 years and 9.9% were 65 and over.

The most popular resort regions to which Latin American visitors stayed in 2018 was Montego Bay with a total of 13,136 or 38.7% of visitors from Latin America, 22.1% or 7,501 Latin American visitors stayed in Kingston and another 19.4% or 6,569 stayed in Negril.

Seasonality of Stopover Arrivals from Latin America



CARIBBEAN

Arrivals from Caribbean territories to Jamaica increased in 2018, Jamaica welcomed 67,495 arrivals from this market, which is 264 more arrivals than the peak of 67,231 Caribbean nationals who visited Jamaica in 2008, and it is a 5.6% increase over the 63,944 who visited in 2017.

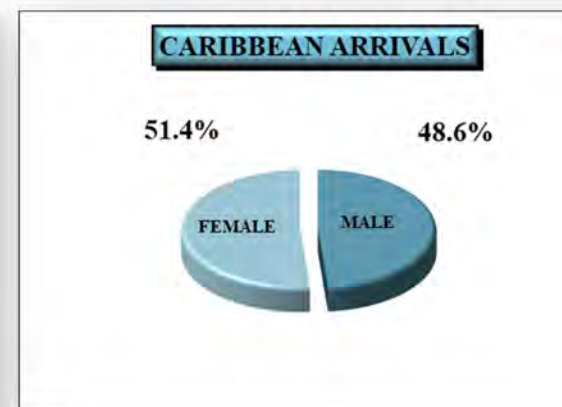
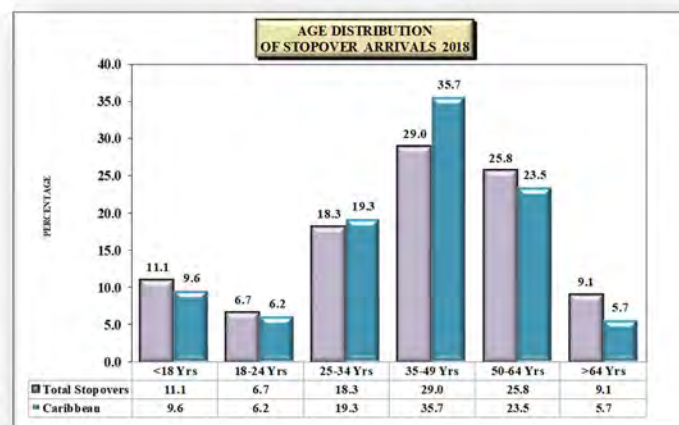
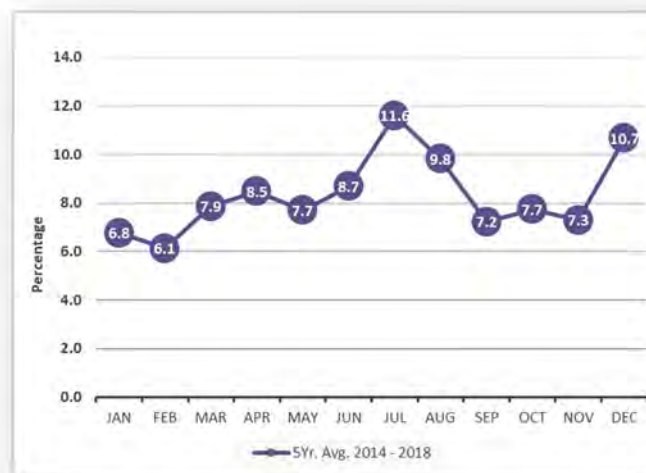
The annual average growth rate for visitors from the Caribbean over the past five years from 2014 to 2018 was positive 3.4%.

July, December, and August were the peak months for visitor arrivals from the Caribbean in 2018 with July being the highest month with 7,728 visitors.

The Cayman Islands, with 18,701 stopovers, Trinidad and Tobago with 11,255, The Bahamas with 5,925, Barbados with 4,686, and Cuba with 3,740 arrivals continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 44,307 stopovers or 65.6% of the total Caribbean arrivals.

In 2018 the age distribution shows 9.6% were aged under 18 years, 6.2% were between 18 – 24 years, 55.0% were between 25 – 49 years, 23.5% were between 50 – 64 years and 5.7% were 65 and over

Seasonality of Stopover Arrivals from the Caribbean



The Gender mix of visitors from the Caribbean, were 33,567 females (51.4%) and 31,786 males (48.6%). The gender ratio of visitors from the Caribbean is 106 females per 100 males.

The most popular resort regions to which Caribbean visitors stayed in 2018 was Kingston with a total of 31,312 or 46.4% of visitors from the Caribbean, 12.9% or 8,710 Caribbean visitors stayed in Montego Bay and another 9.1% or 6,120 stayed in Ocho Rios.

OTHER COUNTRIES

China, Australia, Japan and India are the main visitor producing countries from other parts of the World. When compared to 2017, China with 3,431 fell by 11.8%, Australia, with 2,307 stopovers fell by 10.4%, Japan with 1,587 was down by 14.2% and India with 1,528 grew by 16.7%.

CRUISE PASSENGERS

According to the Florida-Caribbean Cruise Association (FCCA), 28.2 million passengers sailed the global oceans in 2018, up 5.6% from the 26.7 million passengers in 2017. In 2018 the growth of the cruise industry showed sustained consumer interest in cruising. An industry where the demand continues to outpace supply, as the annual occupancy again exceeded 100 per cent. During 2018, nine new ocean-going vessels with 32,000 lower berths and an investment of more than US\$7.4 billion were added.

The current cruise ship order book extending through 2027 includes 72 new builds, with over 240,000 lower berths at a value of over US\$57 .6 billion.⁷

Today's cruise ships offer a world of innovations that align with cruise lines' brands from sky-diving, go-karts and rollercoasters to celebrity chef, breathtaking spas and all-suite staterooms. While catering to everyone from multi-generational families to solo cruisers, and offering all of them ways to personalize and maximize their one-of-a-kind, once-in-a-life-time vacation, through new technologies with customizable experiences, the Cruise ships' facilities and services continue to exceed the expectations of a growing population of travelers, and cruisers can easily find a cruise brand, ship, stateroom and itinerary to suit them. The Cruise lines have also offered their guests new cruise themes and voyage lengths to meet the changing vacation patterns of today's traveler.

The Caribbean continues to lead as the number one cruise destination, accounting for more than a third (34.4%) of the entire global deployment capacity market share. The passenger numbers for the Caribbean continues to be consistent and high, despite other rising cruise destinations.

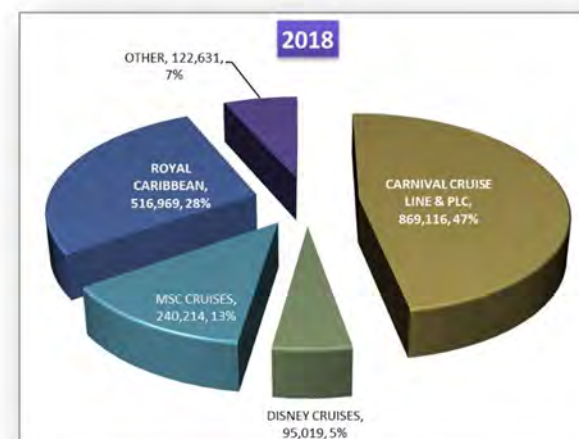
⁷ Source: Florida-Caribbean Cruise Association – Cruise Industry Overview 2019

Jamaica recorded a decline in cruise passengers during 2018 from 551 ship calls. This total of 1,845,873 cruise passengers, who visited our shores, was a 4.0% decrease over the 1,923,274 recorded for the corresponding period in 2017. Seasonally, cruise arrivals recorded an increase of 4.9% in the winter period (January to April) with 812,777 cruise passengers, up from the 774,519 for 2017. During the summer period (May to December), with the exception of the months of May which recorded an increase of 12.7% and December which recorded an increase of 8.8%, every other month recorded declines in cruise passenger arrivals, ranging from a decline of 36.5% in September to a decline of 1.2% in June. During the months of September, October and December of 2017, Jamaica was a recipient of ships that were diverted from the Eastern Caribbean when several Islands had major damage to their ports and destination after the hurricanes. Therefore, the performance of this summer period with a total of 1,033,096 cruise passengers was 10.1% lower than the 1,148,755 passengers in 2017.

The port of Falmouth contributed 744,671 cruise ship passengers or 40.3% of total passengers to Jamaica from 161 cruise ship calls. The port of Ocho Rios, which in the past provided the largest share of Jamaica's cruise arrivals, accounted for 586,715 or 31.8% of the 1,845,873 who arrived at our shores in 2018. The port of Montego Bay accounted for 512,563 passengers or 27.8%.

The cruise ships carrying the most passengers to Jamaica in 2018 were all from the Royal Caribbean Cruise family of ships, the *Oasis of the Seas*, *Harmony of the Seas*, and *Liberty of the Seas*, all calling to the Port of Falmouth. The *Oasis of the Seas* made 22 calls with 138,525 passengers. The *Harmony of the Seas* made 20 calls with 127,144 passengers, and the *Liberty of the Seas* made 26 cruise ship calls and provided 113,319 passengers. The combined total of 378,988 cruise passengers from these three ships represents 20.5% of Jamaica's total cruise passenger market.

Cruise passengers to Jamaica by Major Cruise Lines 2018



CRUISE PASSENGERS TO JAMAICA BY MAJOR CRUISE LINES					
Cruise Lines	2014	2015	2016	2017	2018
CARNIVAL CRUISE LINE & PLC	374,320	480,970	441,551	504,289	490,996
Aida Cruise	43,989	55,473	60,966	71,148	77,805
Costa Cruises	19,019	22,102	17,595	19,227	2,422
Holland America	37,788	23,511	17,309	17,524	26,000
Norwegian Cruises	108,149	129,880	120,363	109,618	196,839
P & O Cruises	-	10,362	19,632	11,711	7,775
Princess Cruises	45,181	24,078	35,475	47,546	67,279
TOTAL	628,446	746,376	712,891	781,063	869,116
ROYAL CARIBBEAN	610,594	610,131	579,853	605,933	477,642
Celebrity Cruises	35,071	51,260	56,162	64,878	12,316
TUI Cruises	-	-	18,716	50,966	27,011
TOTAL	645,665	661,391	654,731	721,777	516,969
MSC CRUISES	78,903	36,741	129,671	204,070	240,214
DISNEY CRUISES	59,437	84,958	67,038	106,109	95,019
Other Cruise Lines	9,987	39,006	88,621	107,537	122,631
TOTAL	1,422,438	1,568,472	1,652,952	1,920,556	1,843,949

Average Length of Stay

In 2018 the overall average intended length of stay for foreign nationals was 8.1 nights; which was less than the 8.4 nights in 2017. This is two less nights spent in Jamaica than those visitors who stayed in Jamaica during the early 1990's, when the intended length of stay was over eleven nights. Those foreigners who used hotel accommodation had an average length of stay of 6.2 nights and those who stayed in non-hotel accommodation stayed 8.7 nights.

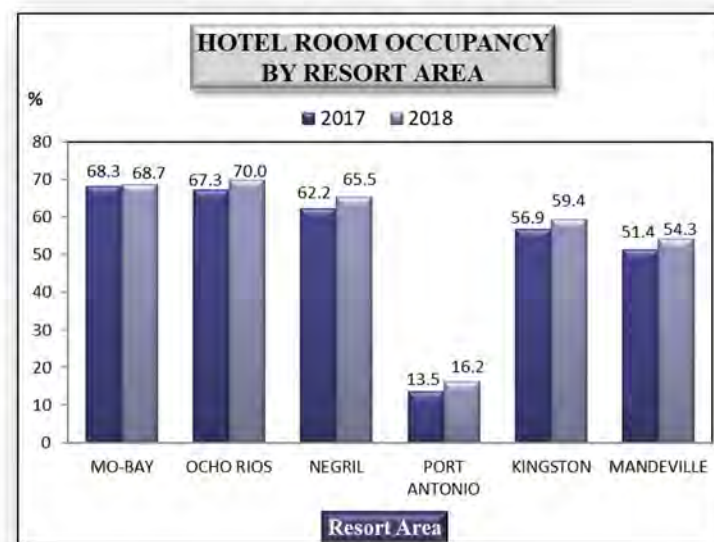
American visitors, on the average, stayed 6.8 nights while Canadians stayed an average of 8.6 nights. Visitors from the United Kingdom recorded an average length of stay of 14.4 nights and those visitors from Continental Europe stayed 11.2 nights.

Hotel Room Occupancy

The average available room capacity rose by 4.7% in 2018, moving from 22,553 rooms in 2017 to 23,615 rooms in 2018. Total room nights sold of 5,767,196 in 2018 was up 7.9% above the 5,344,335 room nights sold in 2017. Hotel room occupancy increased by 2.0 percentage points to 66.9%, compared to the 64.9% level in 2017. The number of stopovers that intended to stay in hotel accommodations increased from 1,652,237 in 2017 to 1,721,682, an increase of approximately 4.2% in 2018.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 68.7%, compared to 68.3% recorded in 2017. The total number of room nights sold increased by 4.1% moving from 2,233,331 in 2017 to 2,326,005 in 2018. The average room capacity increased by 3.5% in 2018, moving from 8,961 rooms in 2017 to 9,277 rooms in 2018. The number of stopovers that intended to stay in Montego Bay at hotel accommodations increased from 716,497 in 2017 to 748,671, an increase of 4.5% in 2018.

	FOREIGN NATIONAL ARRIVALS	Average Length of Stay (Nights)
Hotel	1,710,784	6.2
Non-Hotel	118,521	8.7
Private Homes	441,919	14.9
Other	26,938	16.5
	2,298,162	8.1



The average hotel room occupancy rate for Ocho Rios was 70.0% which was 2.7 percentage points higher than the 67.3% recorded in 2017. The total number of hotel room nights sold moved from 1,474,617 in 2017 to 1,601,371 in 2018 an increase of 8.6%. The number of stopovers that intended to stay in Ocho Rios at hotel accommodations recorded an increase of 2.0%, moving from 451,492 in 2017 to 460,470 in 2018.

The resort area of Negril recorded an average hotel room occupancy rate of 65.5% in comparison to the rate of 62.2% in 2017. The number of hotel room nights sold in this resort area grew by 17.1%, recording 1,425,188 room nights sold compared 1,217,383 sold in 2017. The average room capacity increased by 11.3% in 2018, moving from 5,360 rooms in 2017 to 5,965 rooms in 2018. The number of stopovers that intended to stay in Negril at hotel accommodations increased from 386,055 in 2017 to 410,665, which was an increase of 6.4% in 2018.

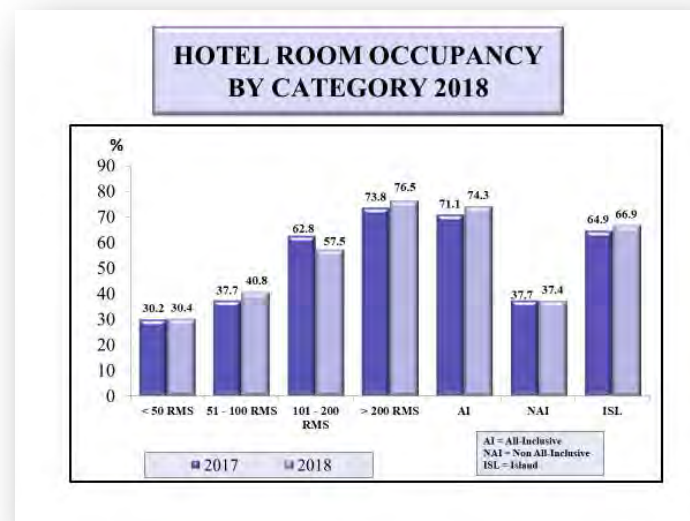
In the Mandeville/Southcoast resort area, average hotel room occupancy rate increased by 5.5 percentage points, moving from 51.4% in 2017 to 54.3% in 2018. The average room capacity decreased by 3.0% in 2018, moving from 7044 rooms in 2017 to 683 rooms in 2018. Room nights sold rose from 132,200 in 2017 to 135,338 being sold in 2018.

Kingston & St. Andrew achieved a hotel room occupancy level of 59.4%, compared to 56.9% recorded in 2017. The number of room nights sold in Kingston & St. Andrew decreased by 3.2%, moving from 277,749 in 2017 to 268,750 in 2018.

Hotel room occupancy for the resort area of Port Antonio was 16.2%, the number of room nights sold in Port Antonio rose from 9,055 in 2017 to 10,546 in 2018 and the average room capacity moved from 184 rooms in 2017 to 178 rooms in 2018.

Overall, the all-inclusive hotel room occupancy rate increased to 74.3% which was 3.2 percentage points higher than the level of 71.1%, as recorded in 2017. Non all-inclusive room occupancy rate moved down from 37.7% in 2016 to 37.4% in 2018.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 30.4%. Hotels with 51 – 100 rooms, achieved a rate of 40.8%. The number of stopovers that intended to stay in hotels with less than 100 rooms increased from 138,115 in 2017 to 138,404, an increase of 0.2% in 2018. Hotels in the size range of 101 – 200 rooms recorded an occupancy rate of 57.5%, and hotels with over 200 rooms achieved a room occupancy rate of 76.5%. The number of stopover arrivals that intended to stay in hotels with more than 100 rooms was 1,583,278 which were higher than the 1,514,122 stopovers in 2017.



HOTEL UTILIZATION

Average Room Capacity Available								
Resort Area	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Share 2018
Montego Bay	6,388	7,304	7,576	8,961	9,277	316	3.5%	39.3%
Ocho Rios	5,112	4,971	5,920	6,007	6,272	265	4.4%	26.6%
Negril	5,103	4,885	5,026	5,360	5,965	605	11.3%	25.3%
Port Antonio	84	114	145	184	178	(6)	-3.3%	0.8%
Kingston & St. Andrew	1,176	1,139	1,261	1,337	1,240	(97)	-7.3%	5.3%
Mandeville & Southcoast	545	592	614	704	683	(21)	-3.0%	2.9%
Jamaica	18,409	19,005	20,542	22,553	23,615	1,062	4.7%	100.0%
Room Nights sold								
Resort Area	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Share 2018
Montego Bay	1,686,627	1,947,392	1,851,573	2,233,331	2,326,005	92,674	4.1%	40.3%
Ocho Rios	1,333,362	1,252,434	1,409,603	1,474,617	1,601,371	126,754	8.6%	27.8%
Negril	1,182,882	1,190,791	1,164,881	1,217,383	1,425,188	207,805	17.1%	24.7%
Port Antonio	4,707	7,490	6,948	9,055	10,546	1,491	16.5%	0.2%
Kingston & St. Andrew	245,290	258,799	263,161	277,749	268,750	(8,999)	-3.2%	4.7%
Mandeville & Southcoast	119,316	126,956	122,446	132,200	135,338	3,138	2.4%	2.3%
Jamaica	4,572,184	4,783,862	4,818,612	5,344,335	5,767,196	422,861	7.9%	100.0%
Room Occupancy								
Resort Area	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Change 2018/16
Montego Bay	72.3%	73.0%	66.8%	68.3%	68.7%	0.4%	0.6%	2.9%
Ocho Rios	71.5%	69.0%	65.1%	67.3%	70.0%	2.7%	4.0%	7.5%
Negril	63.5%	66.8%	63.3%	62.2%	65.5%	3.2%	5.2%	3.4%
Port Antonio	15.3%	18.0%	13.1%	13.5%	16.2%	2.7%	20.4%	23.7%
Kingston & St. Andrew	57.1%	62.3%	57.0%	56.9%	59.4%	2.5%	4.3%	4.1%
Mandeville & Southcoast	60.0%	58.8%	54.5%	51.4%	54.3%	2.8%	5.5%	-0.4%
Jamaica	68.0%	69.0%	64.1%	64.9%	66.9%	2.0%	3.1%	4.4%

Average Room Capacity Available								
Category	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Share 2018
<= 50 rooms	1,795	1,954	1,958	2,319	2,411	92	4.0%	10.2%
51 - 100	2,053	1,819	2,070	2,204	2,068	(136)	-6.2%	8.8%
101 - 200	1,573	1,787	1,860	1,783	2,179	396	22.2%	9.2%
> 200 rooms	12,987	13,445	14,654	16,247	16,956	710	4.4%	71.8%
Jamaica	18,409	19,005	20,542	22,553	23,615	1,062	4.7%	100.0%
Package Plan:								
All-Inclusive	14,432	14,753	16,532	18,406	18,873	467	2.5%	79.9%
Non-All Inclusive	3,976	4,252	4,011	4,146	4,742	595	14.4%	20.1%
Jamaica	18,409	19,005	20,542	22,553	23,615	1,062	4.7%	100.0%
Room Nights sold								
Category	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Share 2018
<= 50 rooms	232,823	254,578	205,673	255,784	267,776	11,992	4.7%	4.6%
51 - 100	299,430	310,024	268,679	303,044	308,157	5,113	1.7%	5.3%
101 - 200	394,609	444,963	421,211	408,622	457,121	48,499	11.9%	7.9%
> 200 rooms	3,645,322	3,774,297	3,923,049	4,376,885	4,734,142	357,257	8.2%	82.1%
Jamaica	4,572,184	4,783,862	4,818,612	5,344,335	5,767,196	422,861	7.9%	100.0%
Package Plan:								
All-Inclusive	3,933,457	4,080,116	4,258,123	4,773,318	5,119,379	346,061	7.2%	88.8%
Non-All Inclusive	638,727	703,746	560,489	571,017	647,817	76,800	13.4%	11.2%
Jamaica	4,572,184	4,783,862	4,818,612	5,344,335	5,767,196	422,861	7.9%	100.0%
Room Occupancy								
Category	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Change 2018/16
<= 50 rooms	35.5%	35.7%	28.7%	30.2%	30.4%	0.2%	0.7%	5.9%
51 - 100	40.0%	46.7%	35.5%	37.7%	40.8%	3.1%	8.2%	14.9%
101 - 200	68.7%	68.2%	61.9%	62.8%	57.5%	-5.3%	-8.4%	-7.1%
> 200 rooms	76.9%	76.9%	73.1%	73.8%	76.5%	2.7%	3.7%	4.7%
Jamaica	68.0%	69.0%	64.1%	64.9%	66.9%	2.0%	3.1%	4.4%
Package Plan:								
All-Inclusive	74.7%	75.8%	70.4%	71.1%	74.3%	3.2%	4.5%	5.5%
Non-All Inclusive	44.0%	45.3%	38.2%	37.7%	37.4%	-0.3%	-0.8%	-2.1%
Jamaica	68.0%	69.0%	64.1%	64.9%	66.9%	2.0%	3.1%	4.4%

ACCOMMODATION STATISTICS

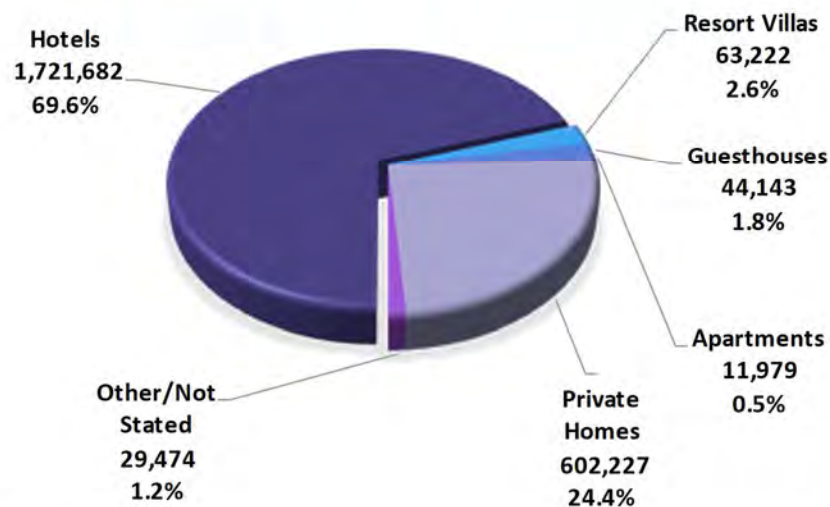
TOURIST ACCOMMODATION INVENTORY								
Category [# Properties]	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Share 2018
<= 50 rooms	94	107	109	116	113	(3)	-2.6%	55.7%
51 - 100	37	32	34	32	31	(1)	-3.1%	15.3%
101 - 200	11	14	15	16	15	(1)	-6.3%	7.4%
> 200 rooms	36	37	40	43	44	1	2.3%	21.7%
All-Inclusive	64	66	72	77	74	(3)	-3.9%	36.5%
Non-All Inclusive	114	124	126	130	129	(1)	-0.8%	63.5%
All Hotels	178	190	198	207	203	(4)	-1.9%	9.9%
Guest Houses	452	490	522	532	510	(22)	-4.1%	24.9%
Resorts Villas	840	886	929	948	968	20	2.1%	47.2%
Apartments	291	294	369	401	371	(30)	-7.5%	18.1%
Total Accommodation	1,761	1,860	2,018	2,088	2,052	(36)	-1.7%	100.0%
Category [# Rooms]	2014	2015	2016	2017	2018	+/- 2018/17	% Change 2018/17	% Share 2018
<= 50 rooms	2,384	2,740	2,745	2,908	2,857	(51)	-1.8%	11.4%
51 - 100	2,649	2,152	2,318	2,250	2,218	(32)	-1.4%	8.8%
101 - 200	1,605	1,986	2,079	2,242	2,147	(95)	-4.2%	8.6%
> 200 rooms	13,672	14,576	15,770	16,742	17,869	1,127	6.7%	71.2%
All-Inclusive	15,418	16,360	17,834	18,738	19,933	1,195	6.4%	79.4%
Non-All Inclusive	4,892	5,094	5,078	5,404	5,158	(246)	-4.6%	20.6%
All Hotels	20,310	21,454	22,912	24,142	25,091	949	3.9%	76.4%
Guest Houses	3,162	3,396	3,737	3,829	3,726	(103)	-2.7%	11.3%
Resorts Villas	2,805	2,944	3,074	3,162	3,204	42	1.3%	9.8%
Apartments	611	614	679	718	818	100	13.9%	2.5%
Total Accommodation	26,888	28,408	30,402	31,851	32,839	988	3.1%	100.0%

* Excluding closed properties

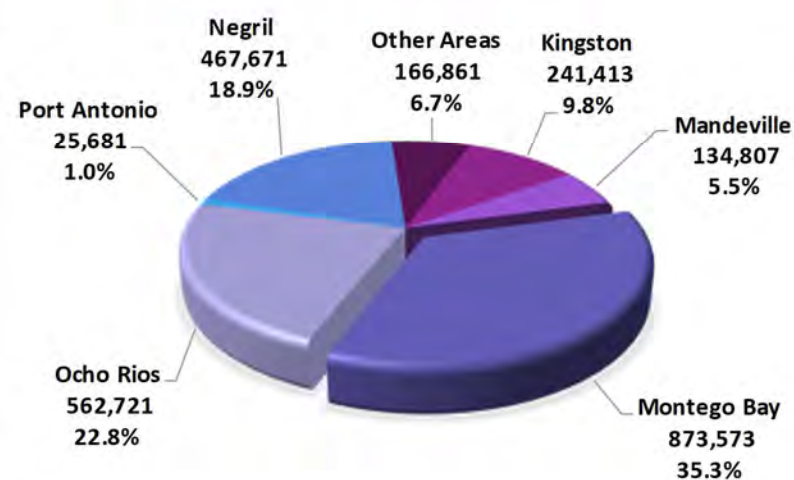
VISITORS TO JAMAICA BY TYPE OF ACCOMMODATION 2018

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Port Antonio	Negril	Other Areas	Total	% Share	Average Length of Stay
Hotels	63,638	36,700	748,671	460,470	958	410,665	580	1,721,682	69.6%	6.2
Resort Villas	10	3,727	31,403	14,847	3,598	9,606	31	63,222	2.6%	8.1
Guesthouses	8,295	3,770	10,999	4,486	2,869	12,533	1,191	44,143	1.8%	9.7
Apartments	894	16	5,039	5,471	-	558	1	11,979	0.5%	9.4
Private Homes	160,177	87,227	69,304	72,141	17,299	31,992	164,087	602,227	24.4%	15.8
Other/Not Stated	8,399	3,367	8,157	5,306	957	2,317	971	29,474	1.2%	16.2
Total	241,413	134,807	873,573	562,721	25,681	467,671	166,861	2,472,727	100.0%	8.8
% Share	9.8%	5.5%	35.3%	22.8%	1.0%	18.9%	6.7%	100.0%		
Average Length of Stay	12.0	13.5	6.8	8.0	14.3	7.8	15.6	8.8		

VISITORS BY TYPE OF ACCOMMODATION



VISITORS BY RESORT REGION



Airlift Statistics

TOTAL AIR CAPACITY, PASSENGERS AND LOAD FACTORS													
Capacity Available (Seats)	2015	2016	2017	2018	+ / -	% Change 2018/17	Passengers Carried	2015	2016	2017	2018	+ / -	% Change 2018/17
January	300,270	315,882	318,190	326,015	7,825	2.5%	January	217,533	229,662	238,827	250,195	11,368	4.8%
February	265,138	297,828	279,218	294,937	15,719	5.6%	February	203,479	215,547	217,466	226,794	9,328	4.3%
March	299,811	319,111	318,007	337,915	19,908	6.3%	March	238,806	257,411	248,679	272,715	24,036	9.7%
Q1	865,219	932,821	915,415	958,867	43,452	4.7%	Q1	659,818	702,620	704,972	749,704	44,732	6.3%
April	224,594	247,266	302,985	309,627	6,642	2.2%	April	179,862	186,312	250,713	246,043	(4,670)	-1.9%
May	249,685	255,922	267,804	291,663	23,859	8.9%	May	200,468	201,965	213,707	231,118	17,411	8.1%
June	261,824	273,953	288,533	309,220	20,687	7.2%	June	217,568	228,225	245,423	262,677	17,254	7.0%
Q2	736,103	777,141	859,322	910,510	51,188	6.0%	Q2	597,898	616,502	709,843	739,838	29,995	4.2%
July	291,788	305,304	327,834	344,040	16,206	4.9%	July	252,821	268,643	290,867	299,202	8,335	2.9%
August	280,411	289,031	304,248	322,992	18,744	6.2%	August	238,760	244,723	269,042	284,277	15,235	5.7%
September	208,701	217,026	215,819	241,719	25,900	12.0%	September	162,212	175,134	183,175	186,720	3,545	1.9%
Q3	780,900	811,361	847,901	908,751	60,850	7.2%	Q3	653,793	688,500	743,084	770,199	27,115	3.6%
October	217,358	222,353	235,054	260,559	25,505	10.9%	October	175,198	176,332	199,543	206,538	6,995	3.5%
November	249,693	253,220	276,452	290,055	13,603	4.9%	November	199,847	208,394	229,016	242,128	13,112	5.7%
December	309,852	327,787	343,753	350,399	6,646	1.9%	December	267,941	283,248	304,843	319,400	14,557	4.8%
Q4	776,903	803,360	855,259	901,013	45,754	5.3%	Q4	642,986	667,974	733,402	768,066	34,664	4.7%
Year	3,159,125	3,324,683	3,477,897	3,679,141	201,244	5.8%	Year	2,554,495	2,675,596	2,891,301	3,027,807	136,506	4.7%

Load Factor (% of seats filled)	2015	2016	2017	2018	+ / -	% Change 2018/17
January	72.4%	72.7%	75.1%	76.7%	1.7%	2.2%
February	76.7%	72.4%	77.9%	76.9%	-1.0%	-1.3%
March	79.7%	80.7%	78.2%	80.7%	2.5%	3.2%
Q1	76.3%	75.3%	77.0%	78.2%	1.2%	1.5%
April	80.1%	75.3%	82.7%	79.5%	-3.3%	-4.0%
May	80.3%	78.9%	79.8%	79.2%	-0.6%	-0.7%
June	83.1%	83.3%	85.1%	84.9%	-0.1%	-0.1%
Q2	81.2%	79.3%	82.6%	81.3%	-1.3%	-1.6%
July	86.6%	88.0%	88.7%	87.0%	-1.8%	-2.0%
August	85.1%	84.7%	88.4%	88.0%	-0.4%	-0.5%
September	77.7%	80.7%	84.9%	77.2%	-7.6%	-9.0%
Q3	83.7%	84.9%	87.6%	84.8%	-2.9%	-3.3%
October	80.6%	79.3%	84.9%	79.3%	-5.6%	-6.6%
November	80.0%	82.3%	82.8%	83.5%	0.6%	0.8%
December	86.5%	86.4%	88.7%	91.2%	2.5%	2.8%
Q4	82.8%	83.1%	85.8%	85.2%	-0.5%	-0.6%
Year	80.9%	80.5%	83.1%	82.3%	-0.8%	-1.0%

AIRLINES SERVING JAMAICA

SCHEDULED SERVICE	2016	2017	2018	SCHEDULED SERVICE	2016	2017	2018
AERO GRAVIOTA	Havana	Havana	Havana	EUROWINGS		Cologne	Cologne
	Santiago de Cuba		Santiago de Cuba			Dusseldorf	Munich
AIR CANADA / ROUGE	Halifax	Montreal	Montreal	FLY JAMAICA	Guyana	New York	New York
	Montreal	Quebec	Toronto		New York	Guyana	Guyana
	Ottawa	Toronto	Winnipeg		Toronto	Toronto	Toronto
	Toronto	Winnipeg		FRONTIER AIRLINES	Philadelphia		Raleigh
	Vancouver			INSEL AIR	Curacao	Curacao	
	Winnipeg			JET AIRFLY / TUI AIRLINES	Brussels	Brussels	Brussels
AIRTRANSAT	Calgary	Halifax	Halifax	JETBLUE	Boston	Boston	Boston
	Edmonton	Montreal	Montreal		Ft. Lauderdale	Ft. Lauderdale	Ft. Lauderdale
	Halifax	Toronto	Toronto		New York	New York	New York
	Montreal				Orlando	Orlando	Orlando
	Ottawa			NEOS	Milan	Milan	Milan
	Quebec				Verona	Verona	Verona
	Regina			SOUTHWEST AIRLINES	Baltimore	Baltimore	Baltimore
	Toronto				Chicago	Chicago	Chicago
AIR TURKS & CAICOS / INTERCARIBBEAN	Dom. Rep.	Providenciales	Providenciales		Houston	Ft. Lauderdale	Ft. Lauderdale
	Haiti	Carib. Islands			Milwaukee	Houston	Houston
	Nassau				Orlando	Orlando	Orlando
	Providenciales			SPRIT AIRLINES	Ft. Lauderdale	Ft. Lauderdale	Baltimore
AMERICAN AIRLINES	Boston	Boston	Boston				Detroit
	Charlotte	Charlotte	Charlotte				Ft. Lauderdale
	Chicago	Chicago	Chicago	SUNWING AIRLINES	Calgary	Calgary	Calgary
	Dallas	Dallas	Dallas		Edmonton	Cincinnati	Cincinnati
	Los Angeles	Los Angeles	Los Angeles		Halifax	Edmonton	Edmonton
	Miami	Miami	Miami		Hamilton	Halifax	Halifax
	Philadelphia	Philadelphia	Philadelphia		Milwaukee	Hamilton	Hamilton
AIR SUNSHINE/SHARK/LYNX AIR.	Guantanamo Bay	Guantanamo Bay	Guantanamo Bay		Moncton	Montreal	Moncton
ARKEFLY AIR. / TUI AIRLINES	Amsterdam	Amsterdam	Amsterdam		Montreal	Ontario	Montreal
	Warsaw	Warsaw	Warsaw		Ottawa	Ottawa	Ottawa
BLUE PANORAMA	Malpensa/Milan	Malpensa/Milan	Malpensa/Milan		Quebec	Regina	Regina
BRITISH AIRWAYS	London/Gatwick	London/Gatwick	London/Gatwick		Regina	Saskatoon	Saskatoon
CARIBBEAN AIRLINES	Antigua	Antigua	Antigua		Saskatoon	St. Johns	St. Johns
	Barbados	Barbados	Barbados		Toronto	Toronto	Toronto
	Ft. Lauderdale	Ft. Lauderdale	Ft. Lauderdale		St. John's	Vancouver	Vancouver
	Nassau	Nassau	Nassau		Vancouver	Windsor	Windsor
	New York	New York	New York		Winnipeg	Winnipeg	Winnipeg
	Orlando	Orlando	Orlando	SWOOP AIRLINES			Hamilton
	Port of Spain	St. Maarten	Toronto	UNITED AIRLINES	Chicago	Chicago	Chicago
		Toronto			Houston	Houston	Houston
CAYMAN AIRLINES	Grand Cayman	Grand Cayman	Grand Cayman		Newark	Newark	Newark
COPA	Panama	Panama	Panama		Washington D.C.	Washington D.C.	Washington D.C.
CONDOR	Frankfurt	Frankfurt	Dusseldorf	U.S.AIR	Boston		
	Munich	Munich	Frankfurt		Charlotte		
			Munich		Philadelphia		
DELTA AIRLINES	Atlanta	Atlanta	Atlanta	VIRGIN ATLANTIC	London/Gatwick	London/Gatwick	London/Gatwick
	Boston	Boston	Boston	WEST JET	Montreal	Montreal	Calgary
	Detroit	Cincinnati	Detroit		Ottawa	Ottawa	Ottawa
	Minneapolis	Detroit	Minneapolis		Toronto	Toronto	Toronto
	New York	Minneapolis	New York		Winnipeg	Winnipeg	Winnipeg
		New York					
		Tampa					

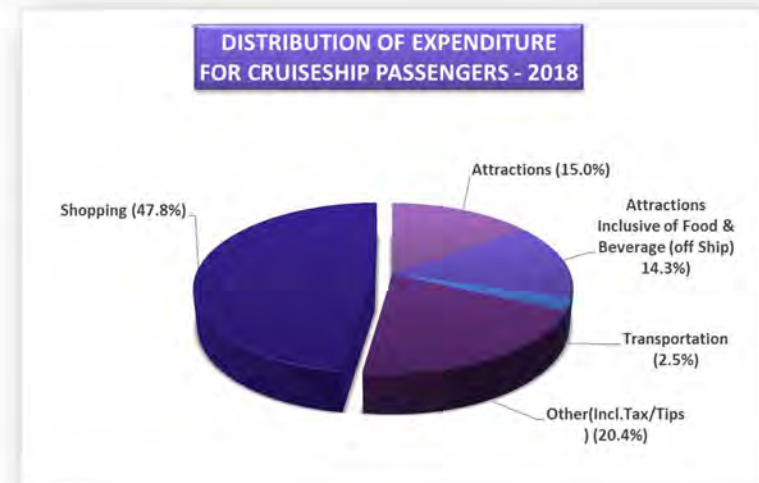
CHARTERED SERVICE	2016	2017	2018	CHARTERED SERVICE	2016	2017	2018
Aereos Servicios		Dom. Rep.		Swift Air		Atlanta	Atlanta
Air Berlin	Dusseldorf	Dusseldorf				Barbado	Chicago
	Munich					Cincinatti	Cincinatti
Air Century	Cancun, Mexico	Cancun	Barbados			Cleveland	Cleveland
	Barbados	Dom. Rep.	Dom. Rep.			Dallas	Dallas
	Dom. Rep.	Holguin	Havana			Guyana	Lansing
	Havana	Puerto Plata	Punta Cana			Milwaukee	Milwaukee
	LA Ramana	Punta Cana				Nashville	Nashville
	Punta Cana	Santo Domingo				Pittsburgh	Pittsburgh
		Varadero				St. Kitts & Nevis	Rockford
Allegiant Airlines	Cincinatti					Turks & Caicos	St. Louis
Avianca	Quito, Ecuador	Quito, Ecuador		Thomas Cook	Arlanda, Sweden	Arlanda, Sweden	Arlanda, Sweden
Bahamas Air	Nassau				Gothenburg, Sweden		
Condor	Frankfurt	Dusseldorf	Dusseldorf		London/Gatwick		
	Munich	Frankfurt	Frankfurt		Manchester		
		Munich	Munich	Thompson Fly	Arlanda, Sweden	Birmingham	Birmingham
Euro Wings	Cologne	Cologne	Cologne		Birmingham	Dublin	Cardiff
	Dusseldorf		Dusseldorf		Copenhagen	Glasgow	East Midlands
			Munich		Dublin	London/Gatwick	Glasgow
Evelop Airlines		Madrid	Madrid		Glasgow	Manchester	London/Gatwick
Interjet	Mexico				Helsinki	Stantead	Manchester
Lasca Air	San Jose, Costa Rica				London/Gatwick	Stockholm, Sweden	Newcastle
Miami Air	New York	Antigua	Hartford, CT		Manchester	Doncaster	
		Indianapolis	Miami		Newcastle		
		Miami	Milwaukee		Oslo, Norway		
			Portsmouth, NH		Stockholm, Sweden		
Norwegian Airlines		Chicago		Titan Air	Toronto		
		Milwaukee		World Atlantic	Newark		
Norwind			Sheremetyevo, Russia	Xtra Air	Chicago		
Orbest Air	Lisbon	Lisbon			Indianapolis, In		
Privelege Air	London, Gatwick				St. Louis	St. Louis	
Servicios Aereos Prof.	Dom. Rep.						
	Havana						
Sun Country	Minneapolis	Minneapolis	Minneapolis				
		Chicago	Fargo				
		Fargo	Sioux Falls				
		St. Louis					
		Tallahassee					

Visitor Expenditure

Gross visitor expenditure in 2018 was estimated at approximately US\$3.305 billion. This represents an increase of 9.8% against the estimated US\$3.010 billion earned in 2017.

Total expenditure of Foreign Nationals amounted to US\$3.027 billion. Cruise passenger expenditure totaled US\$0.184 billion while US\$0.094 billion was estimated as the contribution of Non-Resident Jamaicans.

Foreign Nationals spent on the average US\$162.12 per person per night while cruise passengers spent an average of US\$100.47 per person per night.

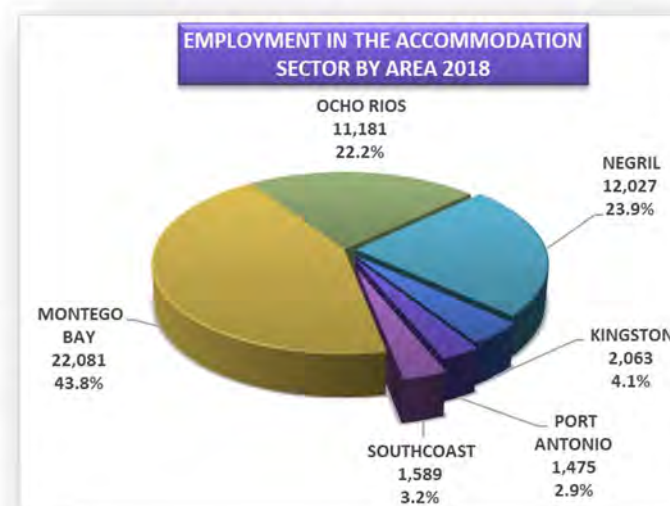


Direct Employment in the Accommodation Sector

The number of persons employed directly in the accommodation sub-sector moved from 48,439 in 2017 to 50,416 in 2018, an increase of 4.1%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 45,289 persons or 89.8% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 22,081 direct jobs represented 43.8% of those employed, Negril with 12,027 direct jobs, accounted for 23.9%, and Ocho Rios with 11,181, was responsible for 22.2%. Kingston, Port Antonio and the South coast accounted for the remaining 10.2% of employment in the accommodation sector.

The average number of employees per room in 2018 was estimated at 1.54.



New Developments 2019

Airlift

- Delta Airlines began new operations out of New York (JFK) into Norman Manley International Airport.
- Frontier Airlines began new services out of Philadelphia Pennsylvania (PHL) and Raleigh North Carolina (RDU), into Sangster's International Airport.
- Spirit Airlines began new services from Orlando Florida (MCO) into both International Airports; and from Detroit (DET) into Sangster's International Airport.
- Southwest Airlines began a new service out of St. Louis, Missouri (STL) into Sangster's International Airport.
- New Chartered services were offered from Sun Country Airline from Dallas Ft. Worth Texas (DFW) and Thomas Cook out of Manchester England (MAN).

Accommodations

- The R Hotel, Kingston's first Extended stay / Apartment Hotel opened with 58 rooms.
- "S" Hotel, the former Breezes Montego Bay, after extensive refurbishing opened with 124 rooms in January 2019.
- AC Hotel Kingston by Marriot with 220 completed construction and opened in June 2019.
- The Half Moon resort has rebranded its villas as the Rose Hall Villas, began construction of 57 additional new rooms scheduled for completion November 2019.
- Ocean Coral Spring by H10 Hotels Trelawny, Silver Sands began construction on the first phase of an exclusive Caribbean resort, with 500 rooms expected to be completed by December 2019.
- The former Oceana Hotel is expected to undergo refurbishing and will form part of the Hilton Tapestry brand to be named the ROK Hotel. This 12-storey hotel, will operate 168 rooms on the downtown Kingston waterfront.