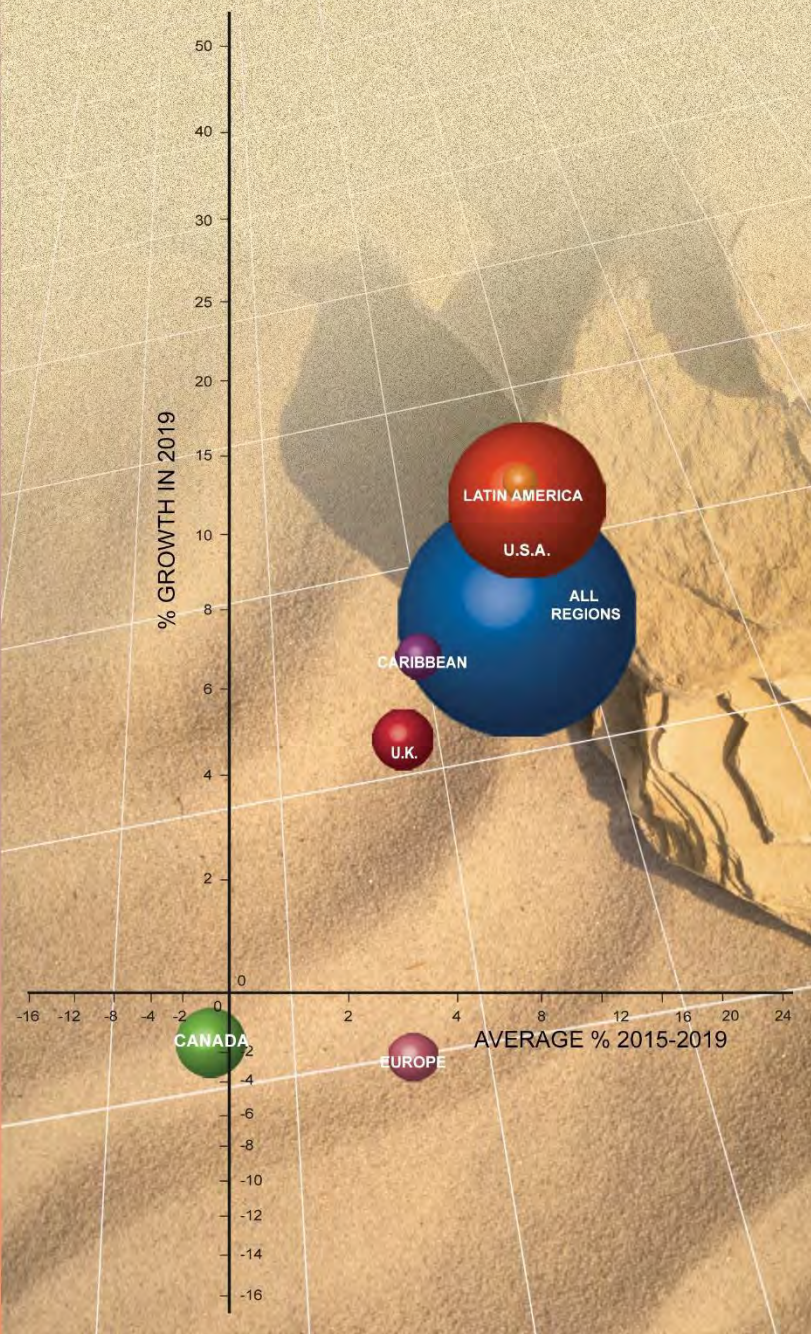


JAMAICA

TOURIST BOARD

Annual Travel Statistics 2019



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 Immigration/Customs C5 Forms 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 C5 Form 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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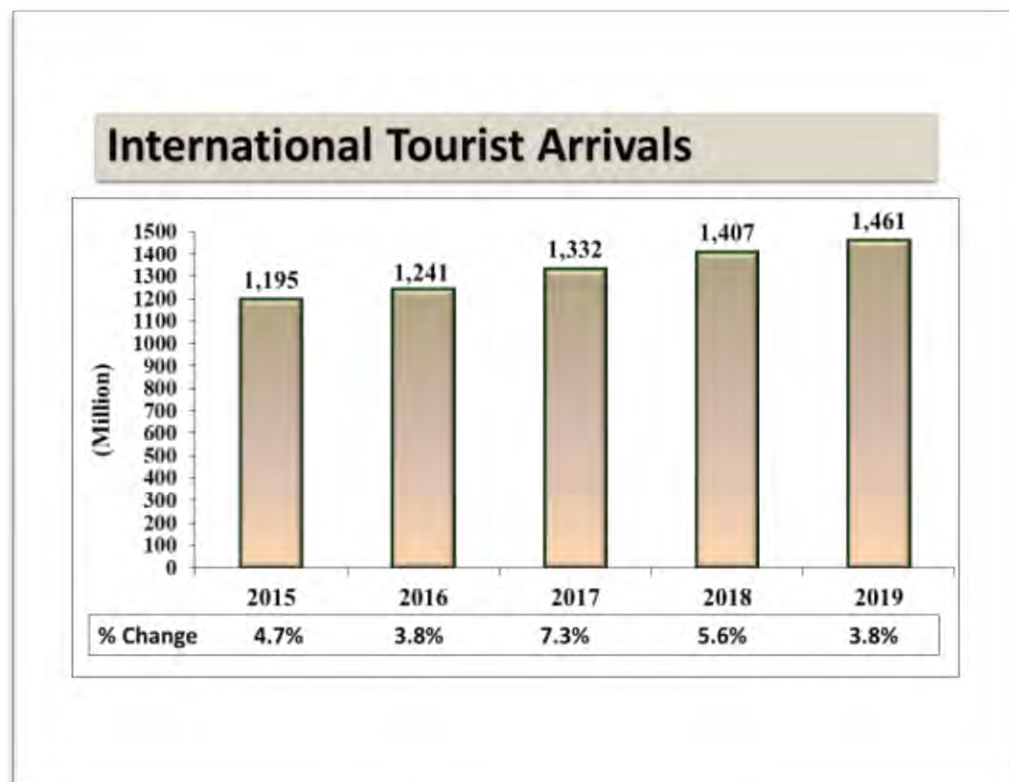
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INTERNATIONAL

The year 2019 continued its upward growth trend in international travel worldwide. It followed a consolidation of the results of 2018 (+6%) and is in line with the consistent trend of 4% or higher growth since 2010. The World Tourism Organization (UNWTO) reported that international tourist arrivals grew by 4.0% in 2019 compared to the same period in 2018, reaching a high of 1,461 million.¹



Source: World Tourism Organization (UNWTO)

As a result, over 509 million more international tourists travelled the world in 2019 as compared to the 952 million international tourists in 2010.

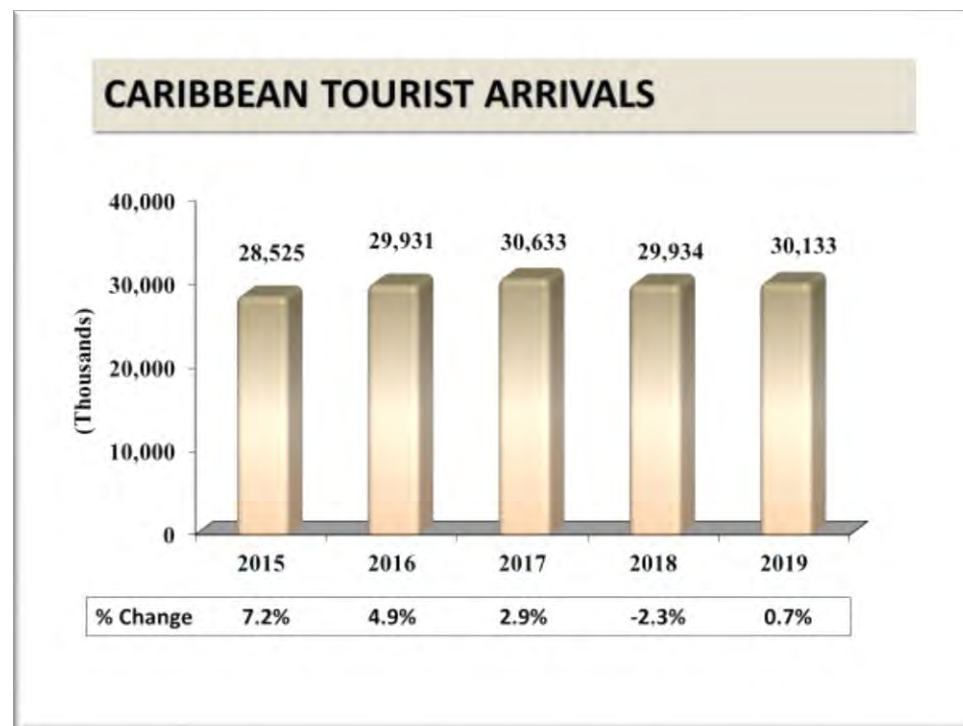
All world regions recorded growth in international tourist arrivals for 2019. The strongest growths were registered in the Middle East, Asia and the Pacific, and Africa, with 7.6%, 4.6% and 4.2% respectively. At rather lower rates of growth was Europe, with 3.7%, and the region with the lowest rate of growth, the Americas, with 2.0%. Europe, the most visited region with over **half the world's** international tourist, saw an increase of 26.2 million arrivals in 2019, reaching a total of 742.3 million. The second most visited region in the world, Asia and the Pacific increased by 15.9 million more arrivals to a total of 363.6 million. The Americas, to which Jamaica is a part, with a growth of 2.0%, welcomed an additional 4.4 million international tourists raising the total to 220.1 million. Growth was driven by the Caribbean posting a growth of 4.9%, with 27.1 million arrivals.

¹ UNWTO World Tourism Barometer – Volume 18 January 2020.

CARIBBEAN

The Caribbean Tourism Organization (CTO) reported that growth in the Caribbean tourism industry continued to be driven by strong demand from the main sources coupled with increased airlift capacity, more diverse accommodation facilities and the sustained recovery in the most severely impacted destinations during the 2017 hurricane season. In 2019 there was an estimated 31.5 million visitors came to ‘enjoy the un-equaed and diverse experiences’ the Caribbean had to offer. This was approximately 1.3 million more tourist arrivals, a 4.4% increase over the 30.2 million in 2018²

The Caribbean region continues to demonstrate that it's diversity of cultures to its authentic natural experiences, offered numerous enjoyable, refreshing and relaxing encounters. The regional growth rate has slowed down and in addition to the preexisting global political and economic issues, some destinations are coping with other obstacles including safety and security, travel restrictions and extreme weather events (Abaco and Grand Bahama in The Bahamas sustained significant damage following the passage of Hurricane Dorian in early September).



International tourist arrivals were up in all major regions within the Caribbean. The performances by major markets were mixed. The US market rebounded with a 10.0% increase and the Caribbean grew by 4.7%, all other markets recorded little or no growth.

TOURIST ARRIVALS TO THE CARIBBEAN BY SUB-REGIONS			
SUB-REGION	2018	2019	%CH.
COMMONWEALTH CARIBBEAN	8,441.0	9,204.1	9.0%
DUTCH CARIBBEAN	1,843.2	2,044.1	10.9%
FRENCH CARIBBEAN	1,185.4	1,237.3	4.4%
US TERRITORIES	2,957.3	3,539.3	19.7%
OTHER CARIBBEAN	15,778.2	15,497.8	-1.8%
TOTAL TOURIST ARRIVALS ('000)	30,205.1	31,522.6	4.4%
source Caribbean Tourism Organization			

CARIBBEAN TOURISM PERFORMANCE BY MAIN MARKET REGIONS						
MAJOR MARKET	2015	2016	2017	2018	2019	%CH.
USA	14,324.5	14,753.8	14,709.9	14,106.5	15,515.9	10.0%
CANADA	3,421.2	3,310.5	3,320.6	3,352.8	3,365.9	0.4%
EUROPE	5,068.2	5,730.0	5,988.2	5,913.7	5,832.7	-1.4%
CARIBBEAN	1,686.1	1,818.7	1,828.8	1,948.5	2,039.6	4.7%
SOUTH AMERICA	2,018.7	1,851.4	1,707.4	1,745.3	1,562.3	-10.5%
OTHER	2,021.3	2,451.6	2,863.9	3,138.4	3,206.1	2.2%
TOTAL TOURIST ARRIVALS ('000)	28,540.0	29,916.0	30,418.8	30,205.2	31,522.5	4.4%
source Caribbean Tourism Organization						

² Caribbean Tourism performance review 2019.

Cruise visits to the Caribbean region grew by 3.4% compared to the same period of 2019. Regional destinations received an estimated 30.3 million cruise visits in setting a new historical high for the period. Fifteen of the twenty-four destinations recorded increased cruise activity in 2019 over 2018. The Bahama Islands, Cozumel, Cayman Islands, St. Maarten and US Virgin Is., are the top five most popular Caribbean Cruise ship destinations within the region, which is 49.2% of the market and representing 14.9 million passengers.

Cruise Passenger Arrivals - 2018 & 2019				
Destination	2017	2018	2019	% Change
Bahamas	4,626.3	4,877.6	5,429.5	11.3%
Cozumel (Mexico)	4,103.8	4,265.5	4,569.5	7.1%
Cayman Islands	1,728.4	1,921.1	1,831.0	-4.7%
St. Maarten	1,237.8	1,597.1	1,631.5	2.2%
US Virgin Islands	1,317.2	1,430.7	1,433.1	0.2%
Jamaica	1,923.3	1,845.9	1,552.3	-15.9%
Puerto Rico	1,229.1	1,658.8	1,784.9	7.6%
Belize	1,014.2	1,208.1	1,170.6	-3.1%
Turks & Caicos Islands	827.4	1,021.7	1,111.8	8.8%
Dominican Republic	1,108.0	982.3	1,103.9	12.4%
Aruba	792.4	815.2	832.0	2.1%
Curacao	634.4	757.3	809.9	6.9%
St. Lucia	668.0	760.3	786.7	3.5%
Antigua and Barbuda	792.9	794.6	733.5	-7.7%
Barbados	681.2	675.8	686.8	1.6%
Haiti	795.4	885.2	652.2	-26.3%
British Virgin Islands	409.7	200.6	575.1	186.8%
Bermuda	418.0	484.3	535.5	10.6%
Grenada	299.4	342.8	337.9	-1.4%
Martinique	405.6	392.6	257.8	-34.3%
source: CTO data supplied by member countries				

A subset of the cruise passenger arrivals in 2019 are compared with 2018 figures.

Summary of Main Indicators 2019

PERCENTAGES ARE % CHANGE COMPARING 2019 AND 2018

STOPOVER ARRIVALS 2,680,920	8.4%	↑
FOREIGN NATIONAL 2,483,169	8.1%	↑
NON-RESIDENT JAMAICANS 197,751	13.3%	↑


STOPOVER ARRIVALS PORT OF ARRIVAL		
MONTEGO BAY 2,137,245	6.2%	↑
KINGSTON 543,675	18.1%	↑

TOTAL ARRIVALS 4,234,150	2.0%	↓
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CRUISE ARRIVALS 1,553,230	-15.9%	↓
OCHO RIOS 595,045	1.4%	↑
MONTEGO BAY 390,665	-23.8%	↓
FALMOUTH 565,980	-24.0%	↓

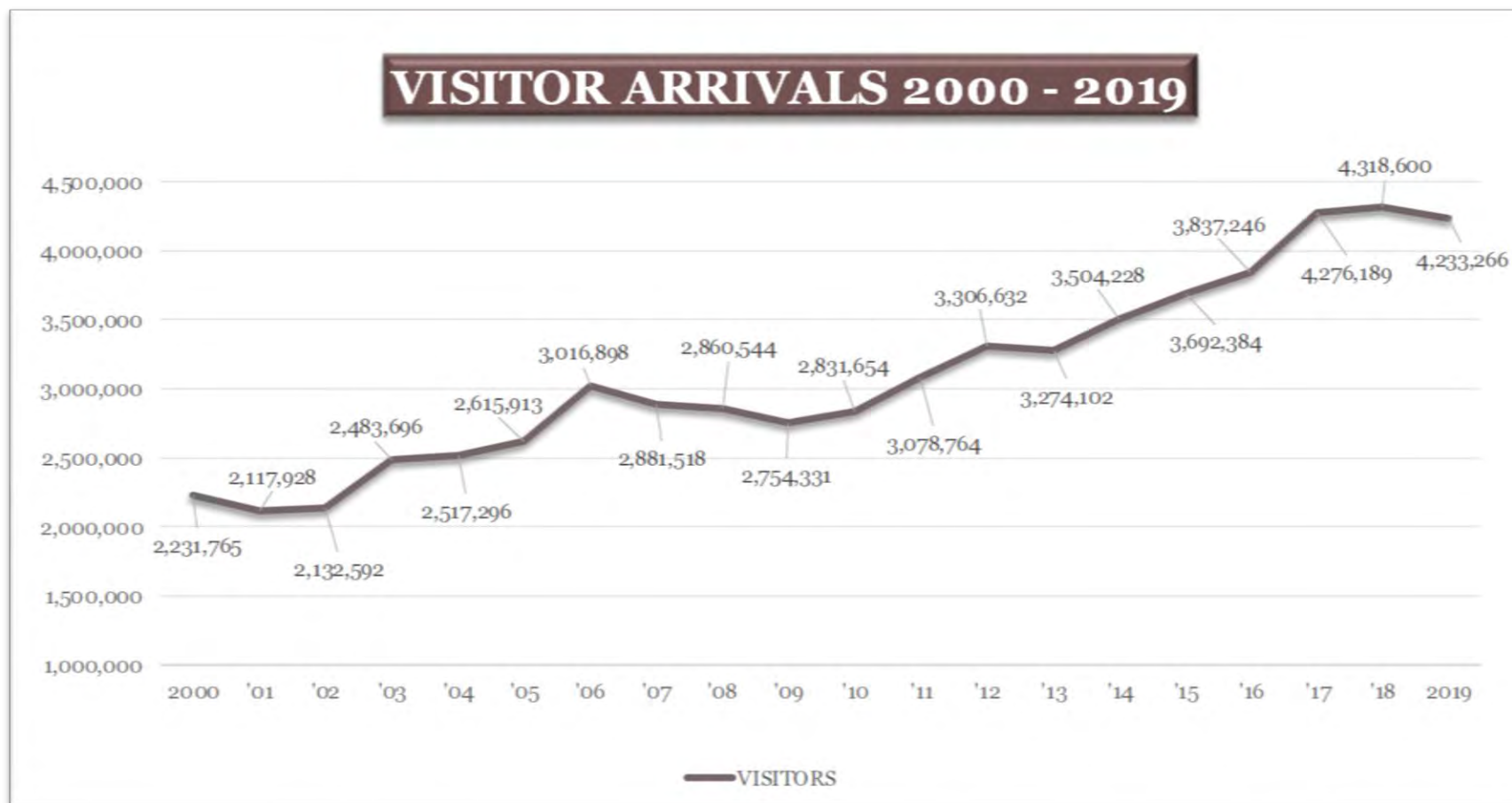
STOPOVER ARRIVALS		% Change	% Share
UNITED STATES 1,838,904	↑	12.9%	68.6%
CANADA 395,561	↓	-1.1%	14.8%
EUROPE 320,640	↓	-2.4%	12.0%
CARIBBEAN 71,816	↑	6.4%	2.7%
LATIN AMERICA 38,885	↑	14.6%	1.5%
ASIA & PACIFIC 8,653	↑	8.5%	0.3%
OTHER COUNTRIES 6,461	↓	-2.0%	0.2%

AVERAGE LENGTH OF STAY IN ALL ACCOMMODATIONS
7.9 NIGHTS
HOTELS
6.1 NIGHTS

AIR CAPACITY	
3,831,704 SEATS	4.1% 

TOURIST ACCOMMODATIONS 32,799 ROOMS	-0.1%
HOTELS ROOMS 25,093	0.0%
% HOTEL ROOM OCCUPANCY 66.9%	-4.0%
EMPLOYMENT IN ACCOMMODATION 51,226	1.6%

TOTAL VISITOR EXPENDITURE (STOPOVER & CRUISE)	US\$ 3,638M	10.1%	↑
STOPVERS US\$ 3,483M	11.6%	↑	
CRUISE US\$ 156M	-11.9%	↓	



TOTAL ARRIVALS

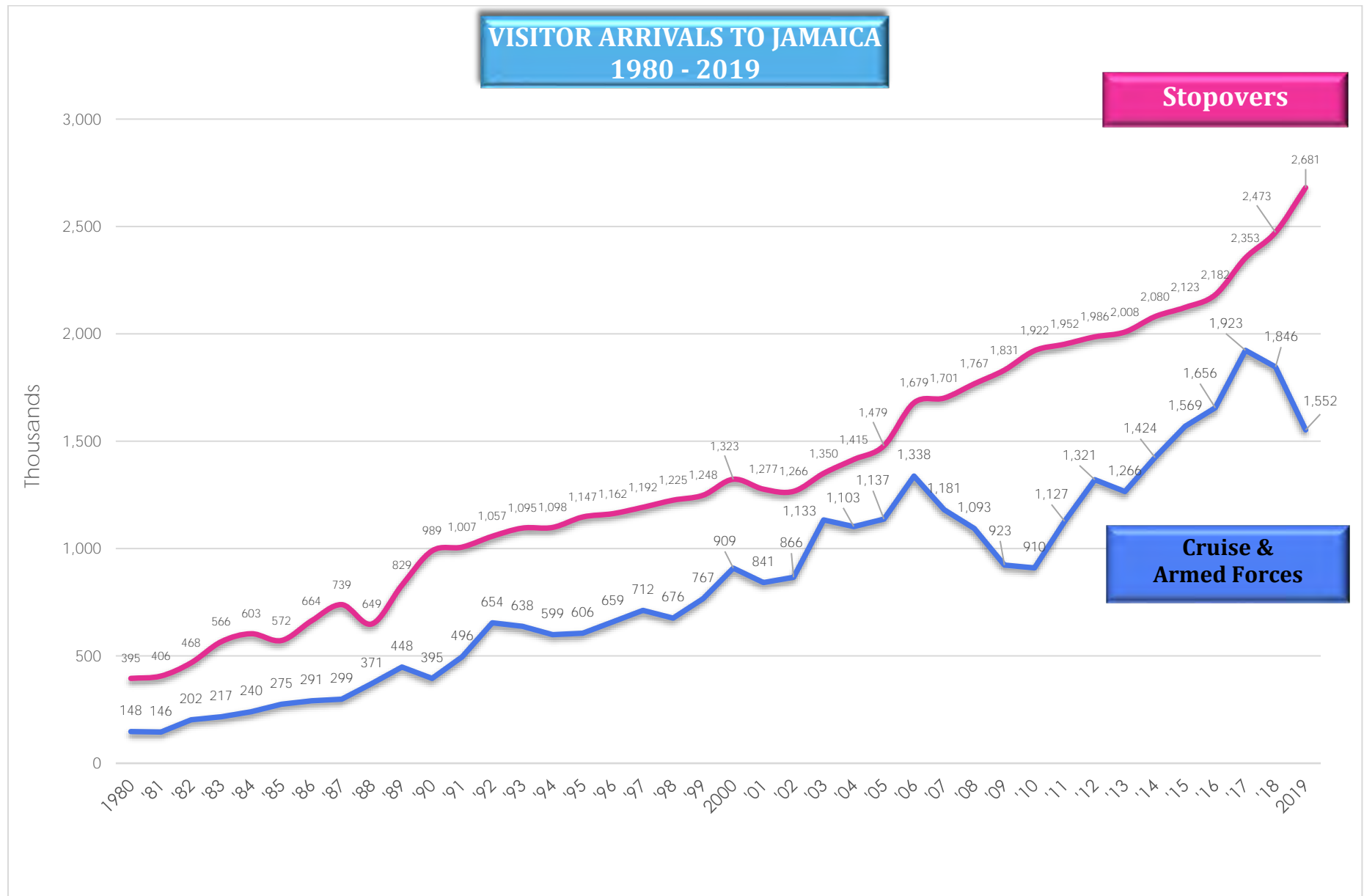
Total visitor arrivals for the year 2019 reached a total of 4,234,150, which was 2.0% below the 4,318,600 arrivals recorded in 2018. This figure represents 84,450 less arrivals than in 2018. In the first quarter of 2019, Jamaica recorded a 3.0% growth in total arrivals over the 2018 figures. During the second quarter this growth slip to -3.0% and in the third quarter this growth moved down -4.9%. In the last and final quarter of 2019, this growth fell again by -4.4%.

The main factors that may be identified as having had an impact **on Jamaica's stopover arrivals during 2019** were as follows:

- The Jamaica Tourist Board embarked on an extensive renewal of our global marketing efforts, these efforts gave birth to the repositioning of brand Destination JAMAICA and a new marketing message: JAMAICA: Heartbeat of the World.
- In order to maintain a market presence during the phased development, Destination JAMAICA was still visible to global travel audiences via the interim One Love Campaign. The primary focus was to drive continued visitation/interest and web traffic through selected traditional and digital channels.
- 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. The JTB continued to deploy strategies and tactics that segment the market audiences into defined user groups, provide them with memorable content/relevant value propositions to nurture prospects and refer leads to our travel agents and tour Operators.
- 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 2019, 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 educate travel agents on the Jamaican Tourism Product.

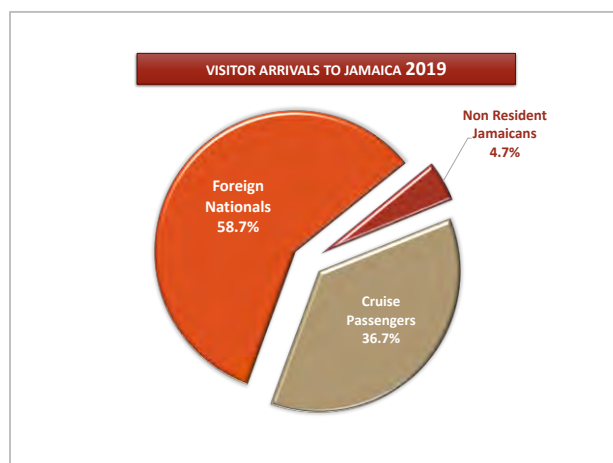
Destination Jamaica continues to offer a diverse product of very high quality to its visitors, through its expansive and inclusive nature in 2019. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations, unequalled visitor experiences and provide value for money.

Visitor Arrivals over the years



Stopover arrivals of 2,680,920 increased by 8.4%.

Foreign National of 2,483,169 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%.



Seasonality of Stopover Arrivals



Stopover Arrivals by Month and Year of Arrival 2015 - 2019

	2015	2016	2017	2018	2019
January	176,621	179,559	185,873	194,609	216,509
February	177,805	185,272	186,670	193,575	220,046
March	212,134	219,673	212,600	236,818	271,742
April	189,903	188,604	205,822	204,734	232,834
Jan.-Apr.	756,463	773,108	790,965	829,736	941,131
May	168,347	167,884	181,669	195,491	210,664
June	182,364	194,088	211,119	229,261	238,888
July	220,662	228,169	248,626	257,050	270,462
August	169,063	169,023	192,878	206,034	214,780
September	114,280	120,340	131,416	134,910	144,583
October	134,317	135,467	157,380	162,552	176,514
November	158,450	163,152	187,062	196,546	202,783
December	219,096	230,453	251,800	261,147	281,115
May - Dec.	1,366,579	1,408,576	1,561,950	1,642,991	1,739,789
Jan. - Dec.	2,123,042	2,181,684	2,352,915	2,472,727	2,680,920
% Inc./Dec.	2.1	2.8	7.8	5.1	8.4

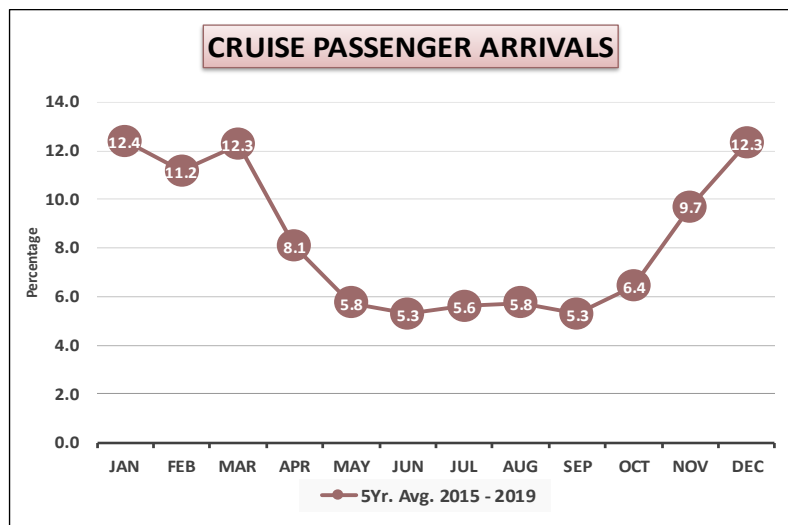


Countries	Stopovers in Thousands								%Change 2019/18
	2016	%Share	2017	%Share	2018	%Share	2019	%Share	
U.S.A.	1,406.1	64.4	1,510.0	64.2	1,628.4	65.9	1,838.9	68.6	12.9
Canada	372.1	17.1	405.2	17.2	400.0	16.2	395.6	14.8	-1.1
Europe	294.7	13.5	325.8	13.8	328.4	13.3	320.6	12.0	-2.4
Caribbean	65.6	3.0	63.9	2.7	67.5	2.7	71.8	2.7	6.4
Latin America	27.7	1.3	32.2	1.4	33.9	1.4	38.9	1.5	14.6
Other Countries	15.5	0.7	15.8	0.7	14.6	0.6	15.1	0.6	3.7
Total	2,181.7	100.0	2,352.9	100.0	2,472.7	100.0	2,680.9	100.0	8.4

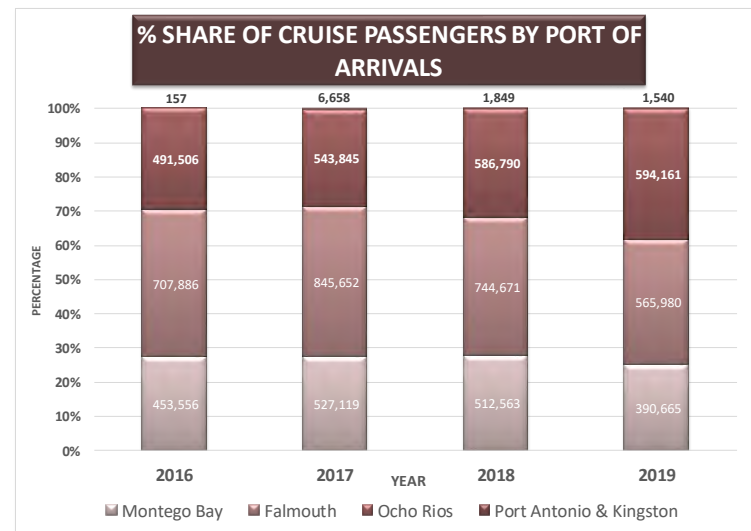
Cruise Passenger Arrivals by Month and Year of Arrival 2015 – 2019

	2015	2016	2017	2018	2019
January	167,591	186,741	205,812	249,635	249,026
February	150,803	197,467	192,664	210,667	202,830
March	194,031	229,111	234,251	213,193	176,409
April	142,139	131,898	141,792	139,282	133,591
Jan.-Apr.	654,564	745,217	774,519	812,777	761,856
May	87,707	94,577	110,712	124,781	73,680
June	89,162	110,086	93,453	92,323	66,552
July	100,150	88,015	110,034	104,127	77,560
August	95,962	99,677	109,074	105,827	80,986
September	88,968	86,033	132,551	84,228	60,416
October	87,719	90,233	150,076	121,975	98,884
November	135,450	159,383	234,643	173,291	126,136
December	229,020	182,341	208,212	226,544	206,276
May - Dec.	914,138	910,345	1,148,755	1,033,096	790,490
Jan. - Dec.	1,568,702	1,655,562	1,923,274	1,845,873	1,552,346
% Inc./Dec.	10.2%	5.5%	16.2%	-4.0%	-15.9%

Seasonality of Cruise Passenger Arrivals



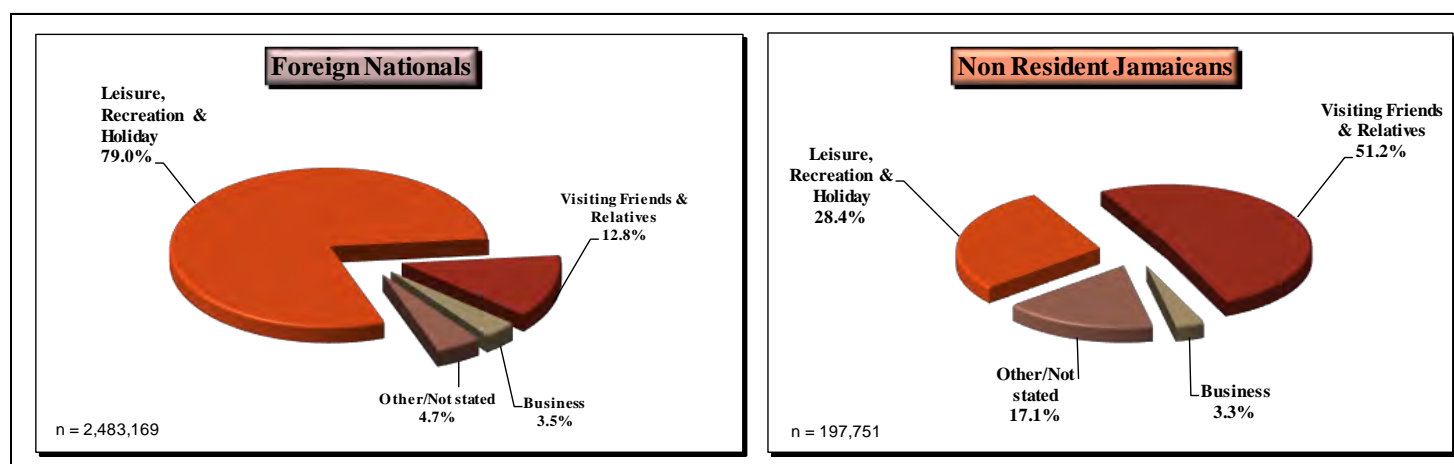
Cruise Passenger Arrivals by Port of Arrival



Stopover Arrivals by Purpose of Visit and Year of Arrival 2015 – 2019

	2015		2016		2017		2018		2019	
	No.	% Share	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	2,015,291	75.2
Visiting Friends & Relatives	293,693	13.8	360,167	16.5	362,962	15.4	385,046	15.6	419,395	15.6
Business	100,839	4.7	98,424	4.5	92,066	3.9	91,648	3.7	93,964	3.5
Other/not stated	124,208	5.9	123,964	5.7	117,375	5.0	128,371	5.2	152,270	5.7
Total	2,123,042	100.0	2,181,684	100.0	2,352,915	100.0	2,472,727	100.0	2,680,920	100.0

Stopover Arrivals by Purpose of Visit and Type of Visitor



Stopover Arrivals by Purpose of Visit and Main Markets 2019

PURPOSE OF VISIT 2019	USA % Share		Canada % Share		UK/ Ireland % Share		Germany % Share	
Leisure, Recreation and Holiday	1,407,496	76.5	318,926	80.6	152,006	66.8	19,371	80.3
Visiting Friends & Relatives	280,466	15.3	54,447	13.8	54,448	23.9	1,682	7.0
Business	46,581	2.5	6,922	1.7	7,737	3.4	1,838	7.6
Other/not stated	104,361	5.7	15,266	3.9	13,373	5.9	1,237	5.1
Total	1,838,904	100.0	395,561	100.0	227,564	100.0	24,128	100.0

MARKET PERFORMANCE

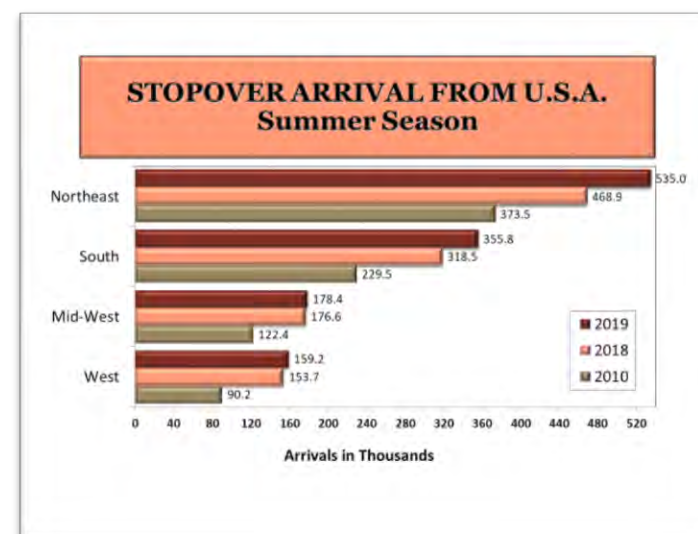
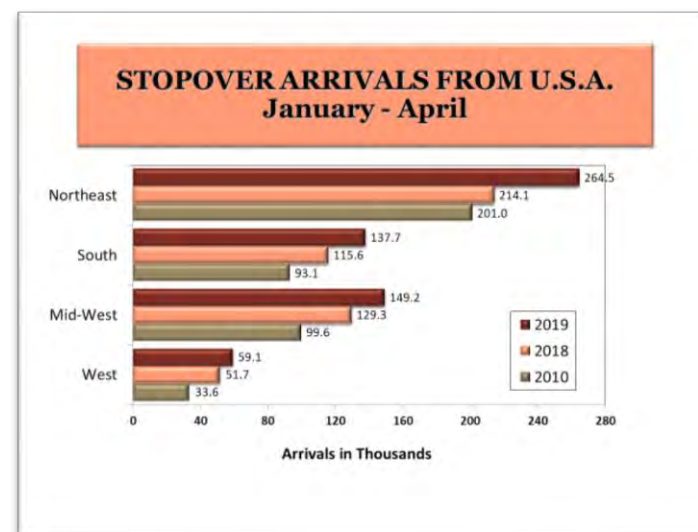
UNITED STATES

Travel by 44.8 million US citizens during January and December 2019 to overseas regions indicates that outbound travel from the USA increased by 7.3% when compared to outbound travel during the corresponding period in 2018. Travel to the Caribbean region increased by 7.6% during this period also, reflecting a market share of 20.9% of the USA outbound travel market overseas. Of the 99.7 million total outbound travelers for 2019, 54.9 million traveled to Canada and Mexico.³

Pertaining to Jamaica, during the winter period (Jan. – Apr.), stopover arrivals in 2019 were 19.6% higher than those in 2018 and 42.9% higher than in 2010. In comparison to the 2018 winter period, stopover arrivals from all market regions recorded increases in arrivals; the Northeast grew by 23.6%, the South by 19.2%, the Midwest by 15.4% and the West 14.4%.

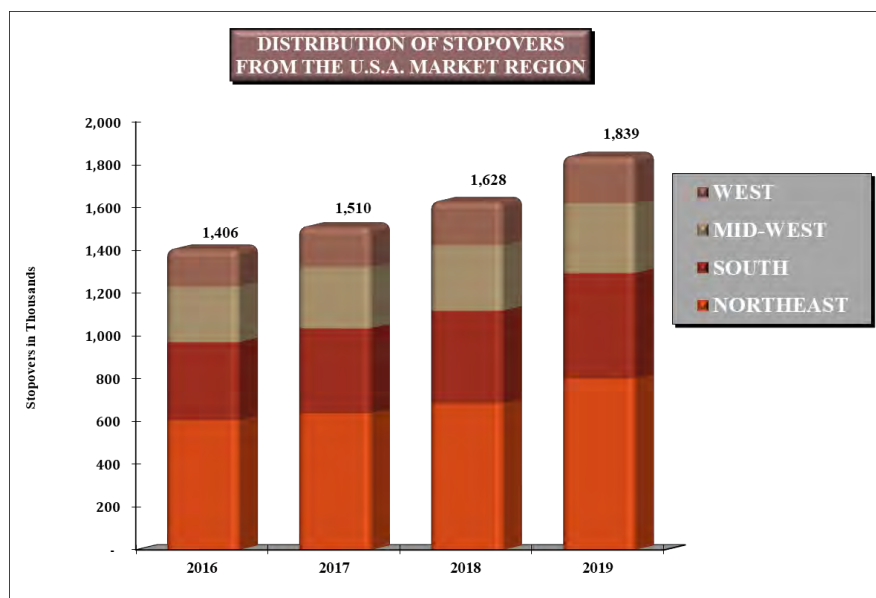
For the summer period (May – Dec.), the US market grew by 9.9% when compared to 2018 and rose 50.6% over 2010. A total of 1,228,369 stopover arrivals came during summer. The strongest growth was recorded in the Northeast region, with 534,983 arrivals up 14.1%, followed by the South region with 355,817 arrivals up by 11.7%. The Midwest region recorded 178,379 arrivals up 1.0% and the West region, with 159,190 arrivals, recorded an increase of 3.6%.

The Northeastern and Southern regions contributed 70.3% of the US stopover visitors to Jamaica during 2019. This represents 1.9 percentage points less than its 72.2% contribution in 2010. The Midwest region contributed 17.8% of the stopover arrivals and the remaining 11.9% of the stopover visitors came from the Western region. The Northeast market region with 799,501 arrivals increased by 17.1%, the South with 493,550 arrivals increased by 13.7%, the Midwest with 327,556 grew by 7.1% and the Western region with 218,297 increased by 6.3%. Overall, arrivals from the USA market increased 12.9% in 2019 with 1,838,904 over the 1,628,402 stopovers in 2018. This performance was 21.8% more arrivals than the 1,509,963 arrivals recorded in 2017 and 30.8% more than the 1,406,058 in 2016.



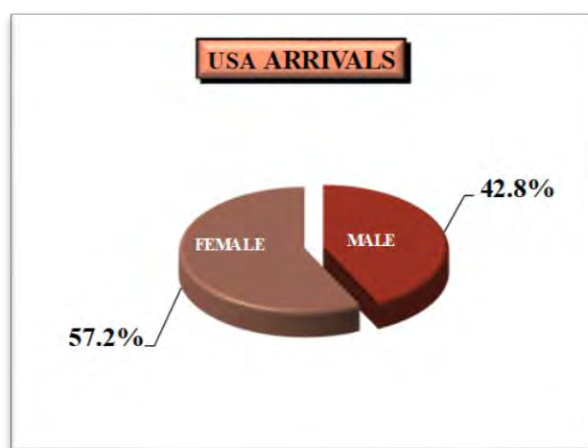
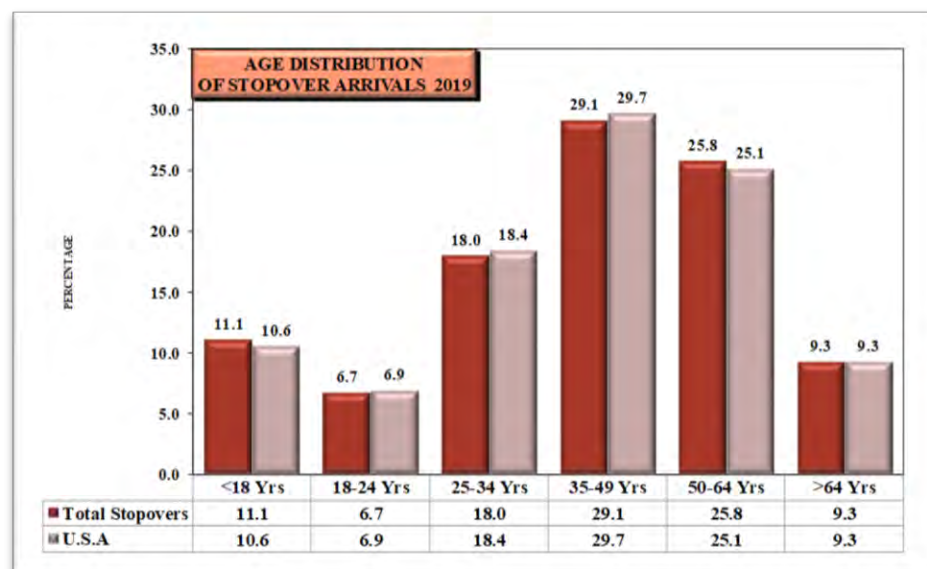
³ U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries "U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico June. 2020"
Overview 2019 Research & Market Intelligence Unit – Jamaica Tourist Board

USA Visitor Summary



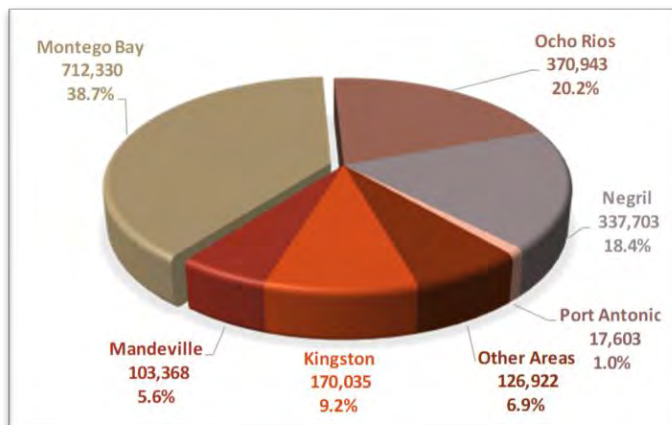
- The average length of stay for Foreign Nationals US visitors in 2019 was 6.6 nights, which is lower than the average of 7.9 nights for all visitors.
- In 2019 a total of 1,407,496 or 76.5% of US visitors came to Jamaica for leisure, recreation and holiday, 280,466 or 15.3% came to visit friends & relatives, 46,581 or 2.5% on business and 104,361 or 5.7% for other or unstated purposes.
- The annual average growth rate for visitors from the USA over the past five years from 2015 to 2019 was 8.2%.
- In 2019 the age distribution of US stopover visitors showed that 10.6% were aged less than 18 years, 6.9% were between 18 and 24 years, 48.1% were between 25 and 49 years, 25.1% were between 50 and 64 years and 9.3% were over 64 years.

U.S.A. Regions	Stopovers in Thousands						%Change 2019/18
	2016	% Share	2017	% Share	2018	% Share	
Northeast	605.1	43.0	638.7	42.3	683.0	41.9	17.1
South	365.0	26.0	405.1	26.8	434.1	26.7	13.7
Mid-West	260.6	18.5	286.7	19.0	305.9	18.8	7.1
West	175.4	12.5	179.5	11.9	205.4	12.6	6.3
Total	1,406.1	100.0	1,510.0	100.0	1,628.4	100.0	12.9

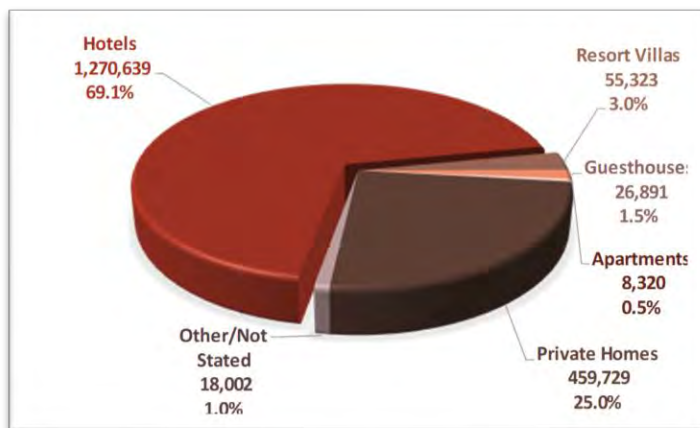


- The Gender mix of visitors from USA, were 787,175 males (42.8%) and 1,051,729 females (57.2%). The gender ratio of visitors from the USA is 127 females per 100 males.

U.S.A Stopover Arrivals by Resort Area of Stay 2019



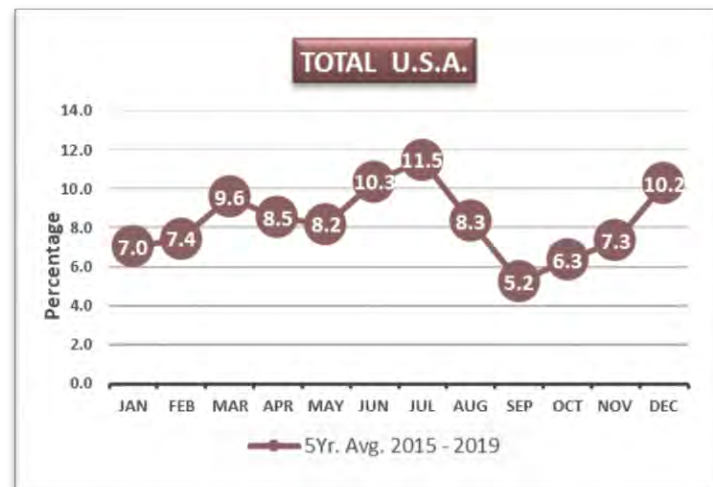
U.S.A Stopover Arrivals by Accommodation of Stay 2019



The most popular resort region to which US stopover visitors stayed in 2019 was Montego Bay with 712,330 or 38.7% of US visitors. 20.2% or 370,943 of the US visitors stayed in Ocho Rios and 18.4% or 337,703 stayed in Negril.

The accommodation of choice which US stopover visitors stayed during 2019 was Hotels with 1,270,639 or 69.1%, Other similar establishments accounted for 90,534 visitors or 5.0%, those staying in private residences accounted for 459,729 visitors or 25.0% of the US visitors.

The peak periods of US stopover visitors to Jamaica were: Summer (June – July), Easter (March- April) and Christmas (December). The months with the highest numbers of stopover arrivals in 2019, in descending order, were: July, June, December, March and April. This pattern has been holding strong for the past five years (2015 – 2019).



Total Stopover Arrivals from the U.S.A by Accommodation of stay and Resort Areas 2019

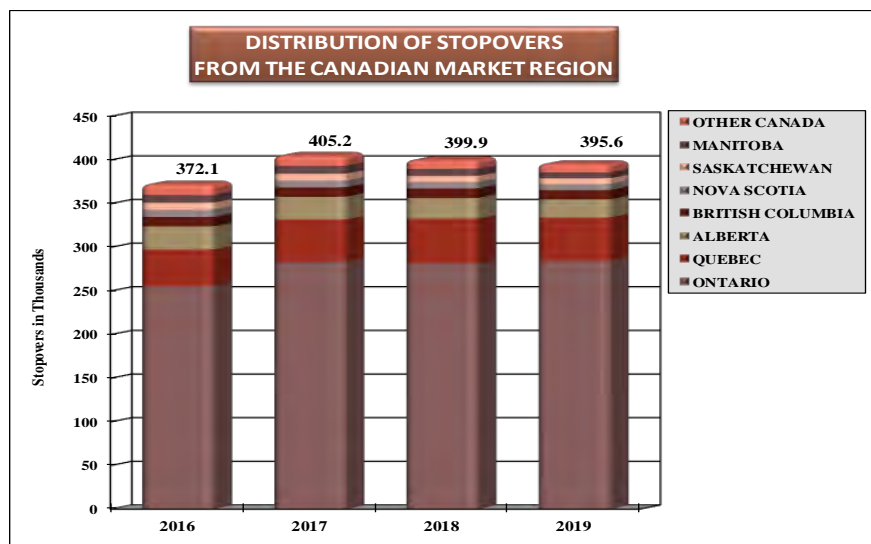
ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	35,952	31,461	613,914	291,236	296,729	867	480	1,270,639	69.1%	5.2
Resort Villas	2	3,229	28,362	14,066	7,716	1,941	7	55,323	3.0%	6.6
Guesthouses	3,649	2,683	6,578	3,521	8,782	741	937	26,891	1.5%	7.1
Apartments	531		3,033	4,189	567			8,320	0.5%	7.2
Private Homes	126,472	63,609	54,719	54,477	22,463	13,466	124,523	459,729	25.0%	12.9
Other/Not Stated	3,429	2,386	5,724	3,454	1,446	588	975	18,002	1.0%	8.6
Total	170,035	103,368	712,330	370,943	337,703	17,603	126,922	1,838,904	100.0%	7.3
% Share	9.2%	5.6%	38.7%	20.2%	18.4%	1.0%	6.9%	100.0%		
Average Length of Stay	9.9	11.0	5.7	11.2	6.3	8.2	12.6	7.3		

CANADA

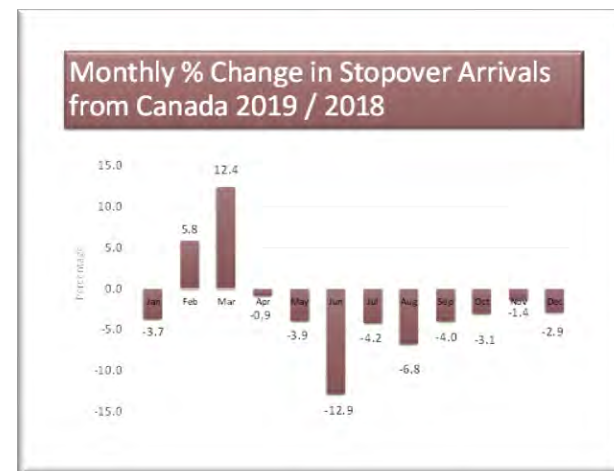
Outbound trips reached an estimated 33.064 million in 2019, which was a 1.1% decrease over the 33.440 million in 2018⁴. Stopover arrivals visiting Jamaica from Canada in 2019 totaled 395,561 representing 4,408 fewer Canadian visitors to Jamaica than in 2018, a 1.1% decrease.

The Canadian market during the (January – April), winter period, grew by 3.4% in 2019. A total of 177,846 stopovers came from that market compared to 172,052 in same period in 2018. This is still 34,079 stopovers below the record number of 211,925 that came in the winter of 2012. Two months of winter recorded increases: February (5.8%) and March (12.4%), while January (-3.7%) and April (-0.9%) recorded declines.

This downward trend continued during the summer period (May – December), with a total of 217,715 stopovers arrivals, compared to the 227,917 arrivals in summer of 2018. The declining rates ranged from a decrease of 12.9% in the month of June to a decrease of -1.4% in the month of November.



Provinces	Stopovers in Thousands								%Change 2019/18
	2016	%Share	2017	%Share	2018	%Share	2019	%Share	
ONTARIO	255.1	68.5	283.3	69.9	281.6	70.4	284.4	71.9	1.0
QUEBEC	42.3	11.4	48.5	12.0	51.2	12.8	49.7	12.6	-2.8
ALBERTA	26.5	7.1	26.1	6.4	23.6	5.9	20.7	5.2	-12.6
BRITISH COLUMBIA	10.9	2.9	11.0	2.7	11.1	2.8	10.7	2.7	-3.6
MANITOBA	8.9	2.4	9.2	2.3	8.2	2.0	6.8	1.7	-17.1
NOVA SCOTIA	8.4	2.2	7.5	1.9	7.3	1.8	7.1	1.8	-2.9
SASKATCHEWAN	7.9	2.1	7.8	1.9	6.9	1.7	6.4	1.6	-7.2
OTHER CANADA	12.3	3.3	11.8	2.9	10.1	2.5	9.8	2.5	-3.3
Total	372.2	100.0	405.2	100.0	400.0	100.0	395.6	100.0	-1.1



The main province of Ontario

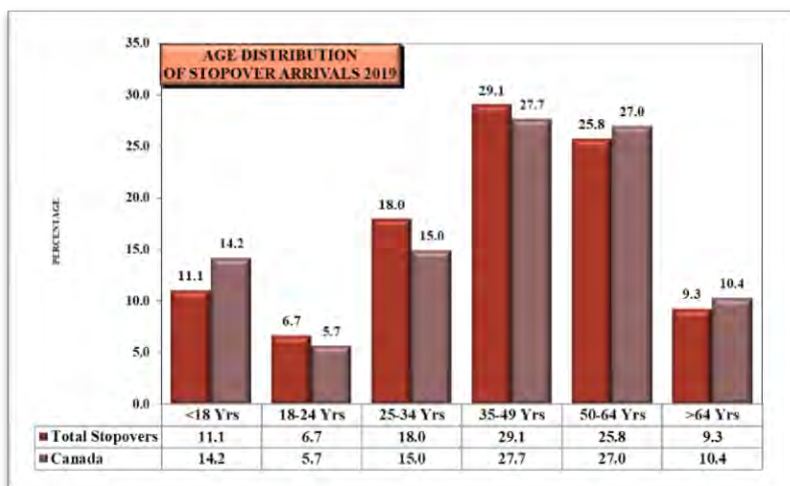
contributed 284,397 or 71.9%

to the Canadian stopover arrival total, which was an increase of 1.0% over the 281,552 who came from that province in 2018. Quebec, the second leading visitor producing province, (with 12.6% of the visitors), produced 2.8% less stopovers. The other two leading provinces, Alberta declined by 12.6%, and British Columbia declined by 3.6% in 2019 compared to 2018.

Canada Visitor Summary

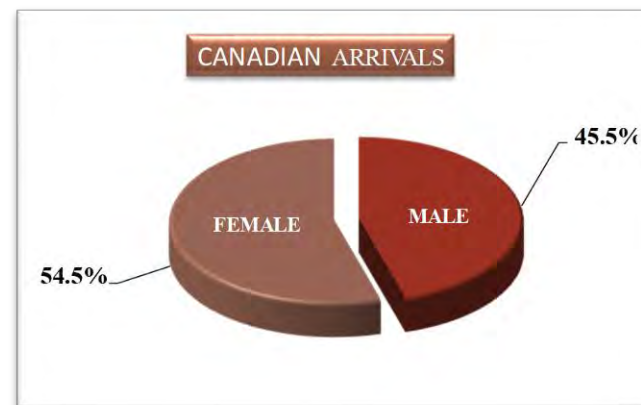
- The average length of stay for Foreign National Canadian visitors in 2019 was 8.7 nights.
- In 2019 a total of 318,926 or 80.6% of Canadian visitors came to Jamaica for leisure, recreation and holiday 54,447 or 13.8% came to visit friends & relatives, 6,922 or 1.7% came on business, and 15,266 or 3.9% came for other or unstated purposes.
- The annual average growth rate for visitors from the Canadian region over the past five year, from 2015 to 2019 was 0.3%.

⁴ Statistics Canada. Table 24-10-0043-01 Canadian tourists returning from abroad.

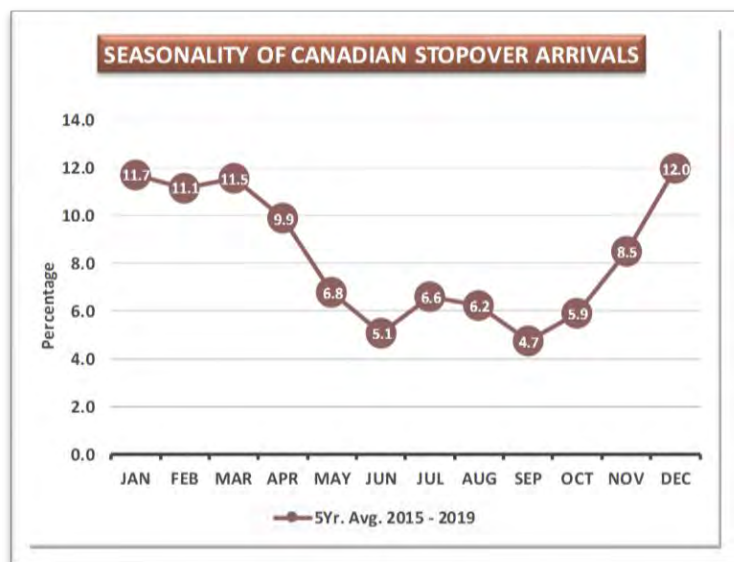


In 2019 the age distribution shows 14.2% were aged under 18 years, 5.7% were between 18 – 24 years, 42.7% were between 25 – 49 years, 27.0% were between 50 – 64 years and 10.4% were 65 and over.

The Gender mix of visitors from Canada, were 179,795 males (45.5%) and 215,766 females (54.5%). The gender ratio of visitors from Canada is 120 females per 100 males.



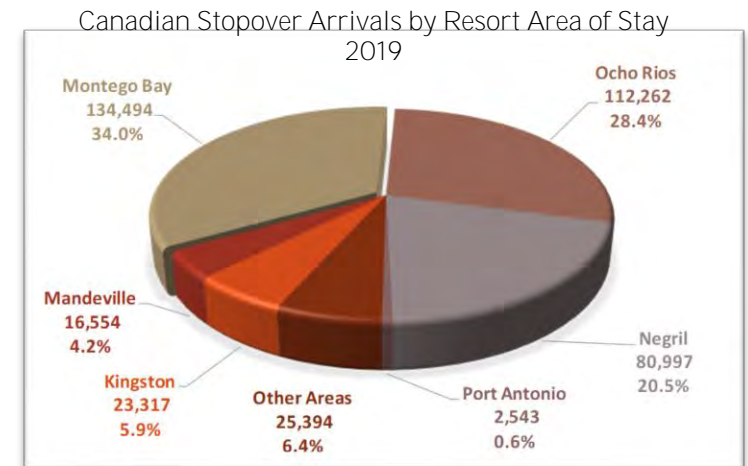
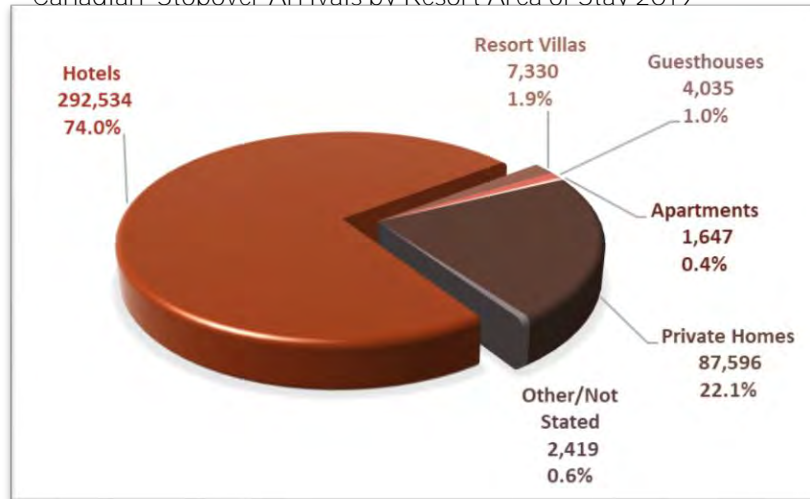
Seasonality of Canadian Stopover Arrivals



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

- The most popular resort regions to which Canadian visitors stayed in 2019 was Montego Bay with a total of 134,494 or 34.0% of Canadian visitors, 28.4% or 112,262 Canadian visitors stayed in Ocho Rios and another 20.5% or 80,997 stayed in Negril.
- The accommodation of choice which Canadian stopover visitors stayed during 2019 was Hotels with 292,534 or 74.0%, Other similar establishments accounted for 13,012 visitors or 3.3%, those staying in private residences accounted for 87,596 visitors or 22.1% of the Canadian visitors.

Canadian Stopover Arrivals by Resort Area of Stay 2019



Total Stopover Arrivals from Canada by Accommodation of stay and Resort Areas 2019

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	3,953	3,085	117,596	96,564	71,123	105	108	292,534	74.0%	6.6
Resort Villas	3	556	3,185	1,922	1,455	201	8	7,330	1.9%	10.1
Guesthouses	454	297	815	408	1,837	99	125	4,035	1.0%	11.5
Apartments	44	-	466	942	195	-	-	1,647	0.4%	11.9
Private Homes	18,418	12,378	11,692	11,959	5,975	2,077	25,097	87,596	22.1%	18.3
Other/Not Stated	445	238	740	467	412	61	56	2,419	0.6%	12.9
Total	23,317	16,554	134,494	112,262	80,997	2,543	25,394	395,561	100.0%	9.4
% Share	5.9%	4.2%	34.0%	28.4%	20.5%	0.6%	6.4%	100.0%		
Average Length of Stay	14.0	17.0	7.6	11.2	8.4	17.6	17.7	9.4		

UNITED KINGDOM/EUROPE

The number of visits abroad by UK residents grew by 1.7% in 2019 from 71.7 million in 2018 to 72.9 million. This growth occurred in relation to a decline in visits to North America which fell by 4.1%, Other Countries increased by 3.7%, and visit to Europe grew by 1.8%.⁵

Stopover arrivals to Jamaica out of the European region negative growth in 2019. Arrivals from Europe decreased by 2.4% in 2019, moving down from 328,369 arrivals in 2018 to 320,640 arrivals in 2019. The United Kingdom, Germany, Italy and France are the most important visitor producing countries within this regional market, in descending order of importance.

United Kingdom Visitor Summary

- The United Kingdom, with 225,037 stopover arrivals, registered an increase of 4.4% over the 215,584 recorded in 2017. The performance for winter period (Jan.-Apr.) rose by 5.9%. This trend continued during the summer with slightly lower level of increases to end the season with an increase of 3.7% compared to 2018.

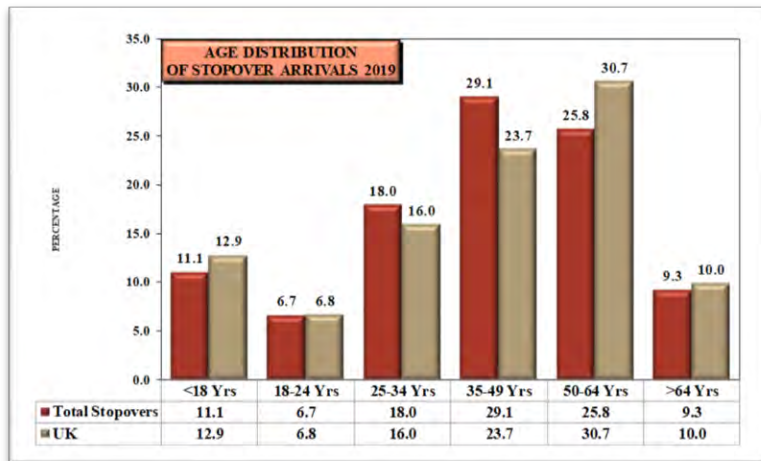


- July, August and December are the peak months for visitor arrivals from UK with July being the highest month for visitors.
- The average length of stay for Foreign National UK visitors in 2019 was 14.1 nights, which is higher than the average of 7.9 nights for all visitors.
- In 2019 a total of 152,006 or 66.8% of UK visitors visited Jamaica for leisure, recreation and holiday, 54,448 or 23.9% visited friends & relatives, 7,737 or 3.4% came on business, and 13,373 or 5.9% visited for other or unstated purposes.
- The annual average growth rate for visitors from the United Kingdom over the past five years from 2015 to 2019 was positive 3.1%.

Seasonality of Stopover Arrivals from Europe

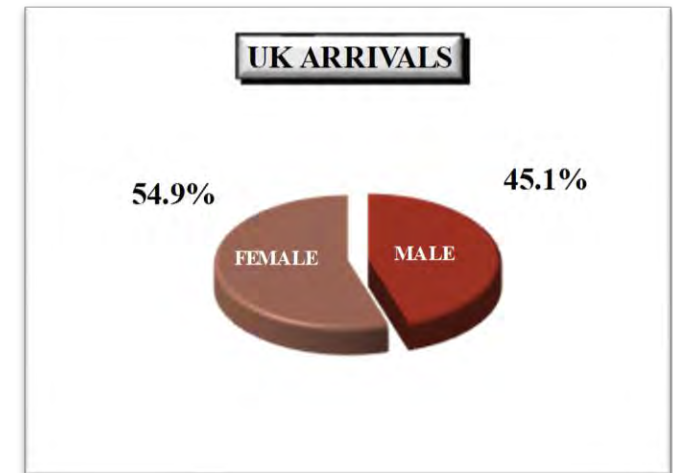


⁵ UK National Statistics – Travel Trends -2019, April 2020



● In 2019 the age distribution shows 12.9% were aged under 18 years, 6.8% were between 18 – 24 years, 39.7% were between 25 – 49 years, 30.7% were between 50 – 64 years and 10.0% were 65 and over.

● The Gender mix of visitors from UK, were 101,529 males (45.1%) and 123,508 females (54.9%). The gender ratio of visitors from the United Kingdom is 122 females per 100 males.



● The most popular resort regions to which UK visitors stayed in 2019 was Montego Bay with a total of 64,579 or 28.7% of UK visitors, 234.9% or 53,772 UK visitors stayed in Ocho Rios and another 20.6% or 46,371 stayed in Negril.

Total Stopover Arrivals from The United Kingdom by Accommodation of stay and Resort Areas 2019

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	4,713	1,162	54,786	41,321	41,911	218	59	144,169	64.1%	10.6
Resort Villas	-	555	1,006	1,186	261	428	-	3,437	1.5%	13.9
Guesthouses	572	211	431	518	620	129	74	2,555	1.1%	13.7
Apartments	37	-	204	633	23	-	-	896	0.4%	15.6
Private Homes	14,566	12,455	7,875	9,756	3,444	2,811	21,837	72,744	32.3%	24.0
Other/Not Stated	310	106	277	359	113	53	19	1,237	0.5%	18.5
Total	20,198	14,489	64,579	53,772	46,371	3,638	21,988	225,037	100.0%	15.1
% Share	9.0%	6.4%	28.7%	23.9%	20.6%	1.6%	9.8%	100.0%		
Average Length of Stay	17.5	23.4	12.1	13.9	12.1	24.0	23.6	15.1		

Europe

Countries	Stopovers in Thousands								%Change 2019/18
	2016	%Share	2017	%Share	2018	%Share	2019	%Share	
United Kingdom	206.5	70.1	217.6	66.8	215.6	65.7	225.0	70.2	4.4
Germany	20.8	7.0	29.9	9.2	34.3	10.4	24.1	7.5	-29.6
Italy	12.9	4.4	13.7	4.2	13.7	4.2	13.5	4.2	-1.3
France	5.3	1.8	7.4	2.3	9.0	2.7	8.3	2.6	-8.2
Netherlands	6.7	2.3	8.2	2.5	9.0	2.7	7.3	2.3	-18.6
Russia	0.9	0.3	1.0	0.3	3.2	1.0	6.4	2.0	103.3
Belgium	6.0	2.0	6.5	2.0	6.3	1.9	5.1	1.6	-19.7
Spain	3.4	1.1	7.7	2.4	6.7	2.0	5.0	1.6	-25.8
Sweden	10.6	3.6	7.7	2.4	5.0	1.5	3.9	1.2	-21.1
Switzerland	3.5	1.2	4.1	1.2	3.8	1.1	3.4	1.1	-10.4
Other Europe	18.2	6.2	22.0	6.7	21.9	6.7	18.6	5.8	-15.1
Total	294.7	100.0	325.8	100.0	328.4	100.0	320.6	100.0	-2.4

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 24,128 stopover arrivals in 2019, the German market declined by a notable 29.6% over the 34,255 recorded in 2018. This is still below the peak of 43,018 German visitors recorded in 1998.

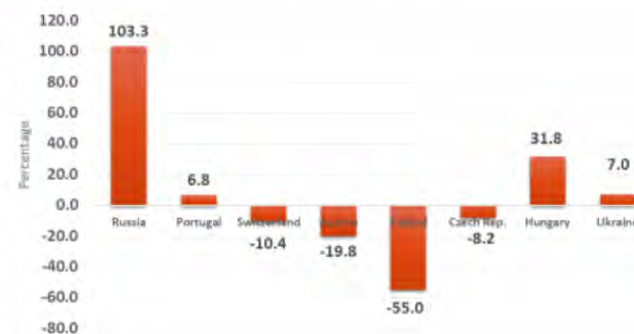
During 2019 Italy was the second main visitor producing country from Continental Europe with 13,540 arrivals, which was a decline of 1.3%; however, this is still below the 29,187 Italian arrivals recorded in 1992.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway and Sweden) represents 72.7 per cent of the total European market.

The performances of the other European countries albeit small numbers recorded mixed growth in 2019 compared to the corresponding period in 2018.

The average length of stay for Continental Europe as a group was 11.4 nights.

% Change in Stopover Arrivals from Selected European Countries 2019 / 2018



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 a notable 14.6%, moving up from 33,922 in 2018 to 38,885 in 2019 and 27.3% 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 2015 to 2019 was positive 7.3%.

July, May, January and December are the peak months for visitor arrivals from Latin America with July being the highest month for visitors.

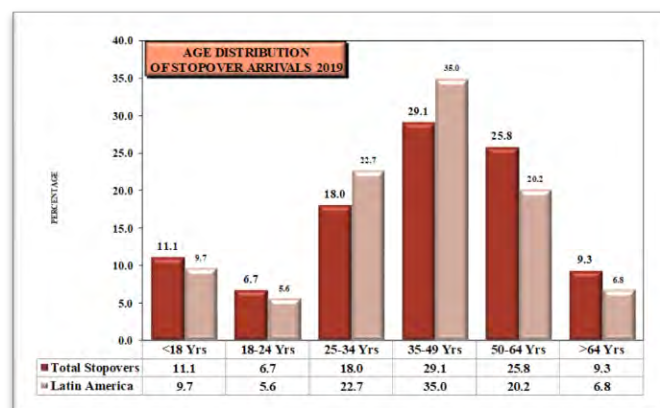
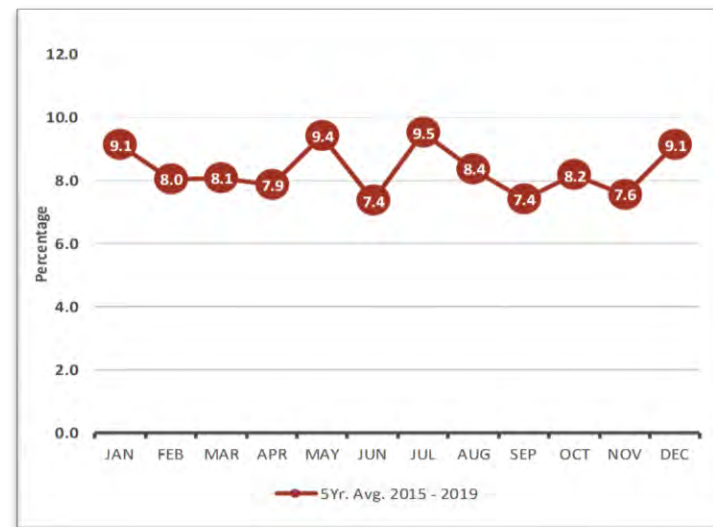
Of the top three visitor-producing countries in the South American sub-region, Argentina with 6,935 visitors increased by 20.1%; Chile with 5,366 visitors fell by 2.1%, and Brazil with 5,302 increased by 0.3%.

From the Central American sub-region, Mexico with 4,160 visitors increased by 7.6%; Panama with 2,500 increased by 7.4%; and Costa Rica with 1,376 increased by 9.0%.

In 2019 the age distribution shows 9.7% were aged under 18 years, 5.6% were between 18 – 24 years, 57.7% were between 25 – 49 years, 20.2% were between 50 – 64 years and 6.8% were 65 and over.

The Gender mix of visitors from Latin America, were 20,587 males (52.9%) and 18,298 females (47.1%). The gender ratio of visitors from the United Kingdom is 89 females per 100 males.

Seasonality of Stopover Arrivals from Latin America

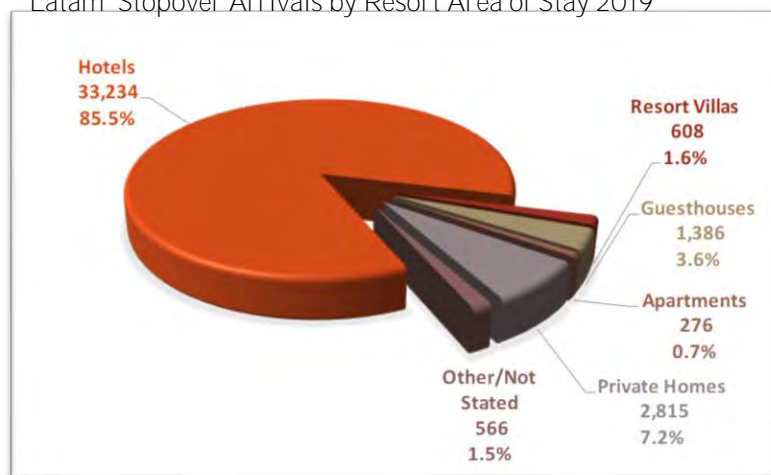


The most popular resort regions to which Latin American visitors stayed in 2019 was Montego Bay with a total of 16,545 or 42.5% of visitors from Latin America, 20.0% or 7,775 Latin American visitors stayed in Kingston and another 19.4% or 7,549 stayed in Negril.

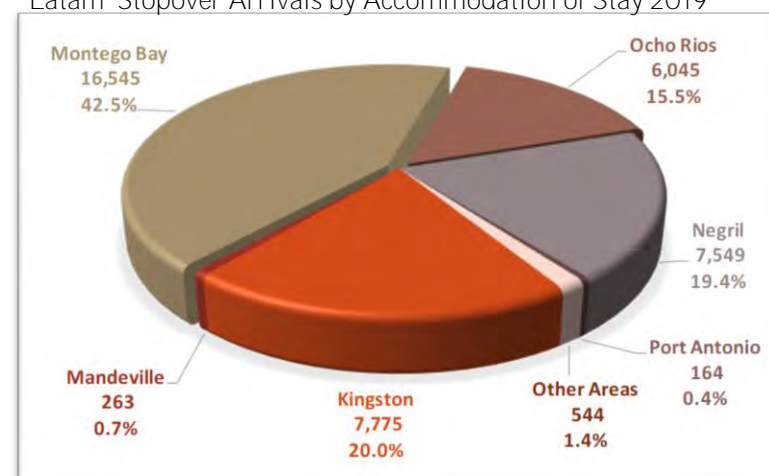
LATINA AMERICA

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	5,188	136	15,293	5,395	7,179	23	20	33,234	85.5%	6.9
Resort Villas	-	3	344	134	69	57	1	608	1.6%	11.7
Guesthouses	605	10	326	50	189	40	166	1,386	3.6%	16.4
Apartments	38	-	121	116	1	-	-	276	0.7%	11.3
Private Homes	1,697	89	339	279	73	23	315	2,815	7.2%	21.1
Other/Not Stated	247	25	122	71	38	21	42	566	1.5%	28.5
Total	7,775	263	16,545	6,045	7,549	164	544	38,885	100.0%	8.6
% Share	20.0%	0.7%	42.5%	15.5%	19.4%	0.4%	1.4%	100.0%		
Average Length of Stay	9.8	18.5	7.3	9.7	7.9	10.3	26.4	8.6		

Latam Stopover Arrivals by Resort Area of Stay 2019



Latam Stopover Arrivals by Accommodation of Stay 2019



CARIBBEAN

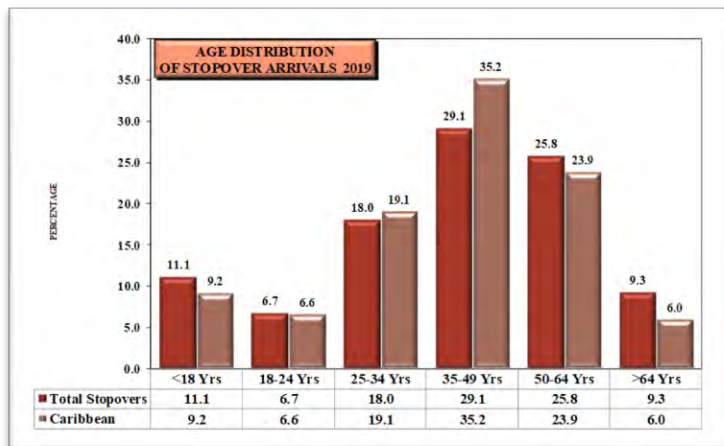
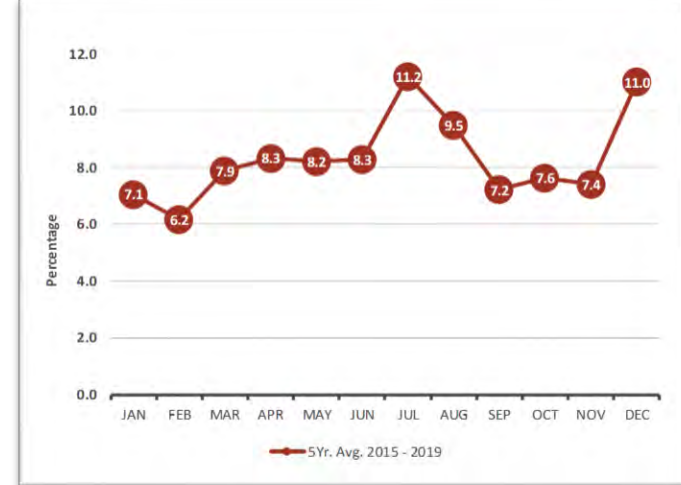
Arrivals from Caribbean territories to Jamaica increased in 2019, Jamaica welcomed 71,816 arrivals from this market, which is 4,585 more arrivals than the peak of 67,231 Caribbean nationals who visited Jamaica in 2008, and it is a 6.4% increase over the 67,495 who visited in 2018.

The annual average growth rate for visitors from the Caribbean over the past five years from 2015 to 2019 was positive 3.5%.

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

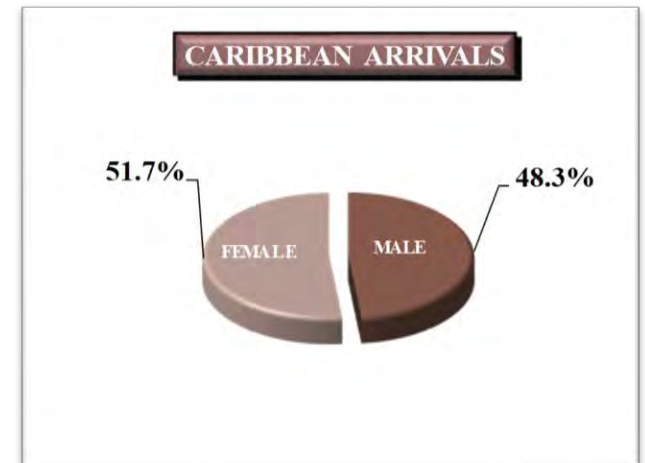
The Cayman Islands, with 21,513 stopovers, Trinidad and Tobago with 11,637, The Bahamas with 6,217, Barbados with 5,051, and Turks & Caicos Is. with 3,280 arrivals continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 47,698 stopovers or 66.4% of the total Caribbean arrivals.

Seasonality of Stopover Arrivals from the Caribbean



In 2019 the age distribution shows 9.2% were aged under 18 years, 6.6% were between 18 – 24 years, 54.3% were between 25 – 49 years, 23.9% were between 50 – 64 years and 6.0% were 65 and over

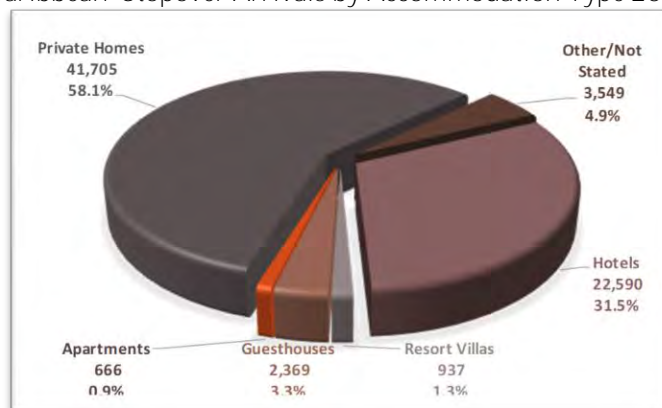
The Gender mix of visitors from the Caribbean, were 37,119 females (51.7%) and 34,697 males (48.3%). The gender ratio of visitors from the Caribbean is 107 females per 100 males.



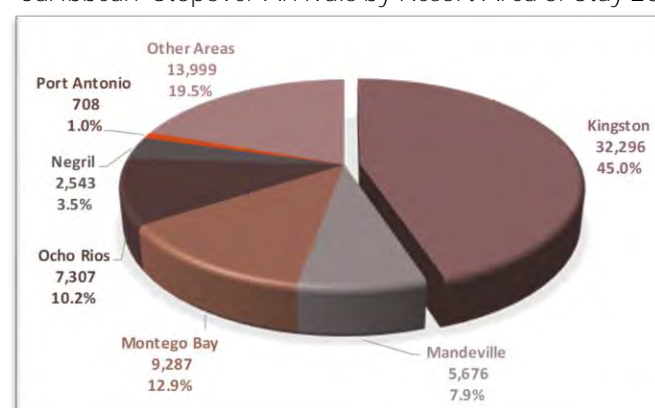
The most popular resort regions to which Caribbean visitors stayed in 2019 was Kingston with a total of 32,296 or 45.0% of visitors from the Caribbean, 12.9% or 9,287 Caribbean visitors stayed in Montego Bay and another 10.2% or 7,307 stayed in Ocho Rios.

CARIBBEAN										
ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	13,114	333	5,256	2,794	978	41	73	22,590	31.5%	5.2
Resort Villas	-	21	479	319	53	65	1	937	1.3%	7.3
Guesthouses	1,860	46	162	165	56	30	49	2,369	3.3%	16.9
Apartments	288	-	163	216	-	-	-	666	0.9%	9.2
Private Homes	14,585	5,118	3,014	3,313	1,397	566	13,711	41,705	58.1%	14.4
Other/Not Stated	2,449	158	212	500	60	6	164	3,549	4.9%	38.8
Total	32,296	5,676	9,287	7,307	2,543	708	13,999	71,816	100.0%	12.9
% Share	45.0%	7.9%	12.9%	10.2%	3.5%	1.0%	19.5%	100.0%		
Average Length of Stay	12.5	14.8	10.5	11.6	12.7	12.8	13.9	12.9		

Caribbean Stopover Arrivals by Accommodation Type 2019



Caribbean Stopover Arrivals by Resort Area of Stay 2019



OTHER COUNTRIES

China, Australia, Japan and India are the main visitor producing countries from other parts of the World. When compared to 2018, China with 3,663 grew by 6.8%, Australia, with 2,095 stopovers fell by 9.2%, India with 1,785 grew by 15.17%, and Japan with 1,713 grew by 7.9%.

CRUISE PASSENGERS

According to the Florida-Caribbean Cruise Association (FCCA), an estimated 30 million passengers sailed the global oceans in 2019, up 6.4% from the 28.2 million passengers in 2018. In 2019 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 2019, ten new ocean-going vessels with 37,000 lower berths and an investment of more than US\$7.6 billion were added.

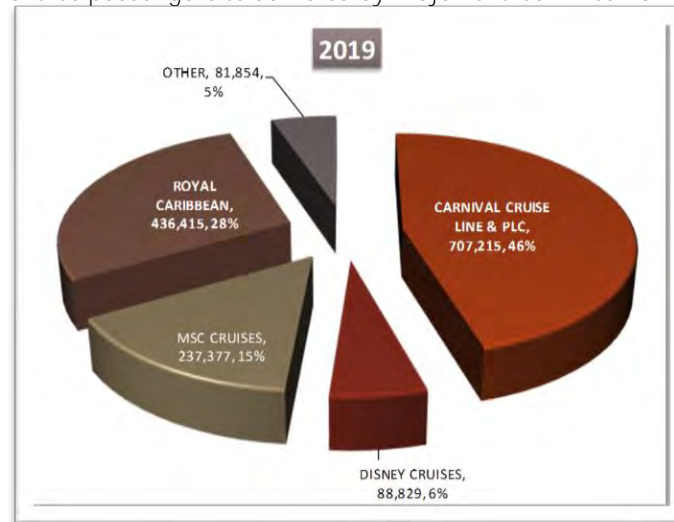
The current cruise ship order book extending through 2027 includes 72 new builds, with over 240,000 lower berths at a value of over US\$57.6 billion.⁶

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.

Jamaica recorded a decline in cruise passengers during 2019 from 478 ship calls. This total of 1,553,230 cruise passengers, who visited our shores, was a 15.9% decrease over the 1,845,873 recorded for the corresponding period in 2018. Seasonally, cruise arrivals recorded a decrease of 6.2% in the winter period (January to April) with 762,740 cruise passengers, down from the 812,777 for 2018. During the summer period (May to December), every month recorded a decline in cruise passenger arrivals, ranging from a decline of 41.0% in May to a decline of 8.9% in December. The performance of this summer period with a total of 790,490 cruise passengers was 23.5% lower than the 1,033,096 passengers in 2018.

Cruise passengers to Jamaica by Major Cruise Lines 2019



⁶ Source: Florida-Caribbean Cruise Association – Cruise Industry Overview 2019 Overview 2019

The port of Ocho Rios provided the largest share of Jamaica's cruise arrivals from 185 calls, accounting for 595,045 or 38.3% of the 1,553,230 who arrived at our shores in 2019. The port of Falmouth contributed 565,980 cruise ship passengers or 36.4% of total passengers to Jamaica from 140 cruise ship calls. The port of Montego Bay accounted for 390,665 passengers or 25.2%. During 2019 the port of Port Antonio received a total of 5 cruise ship calls with 1,540 passengers.

The cruise ships carrying the most passengers to Jamaica in 2019 were, the *Liberty of the Seas*, calling to the Port of Falmouth, *MSC Seaside* and *Carnival Horizon* both calling to the Port of Ocho Rios. The *Liberty of the Seas* made 32 calls with 138,672 passengers. The *MSC Seaside* made 25 calls with 116,852 passengers, and the *Carnival Horizon* made 23 cruise ship calls and provided 107,978 passengers. The combined total of 363,502 cruise passengers from these three ships represents 23.4% of Jamaica's total cruise passenger market.

CRUISE PASSENGERS TO JAMAICA BY MAJOR CRUISE LINES					
Cruise Lines	2015	2016	2017	2018	2019
CARNIVAL CRUISE LINE & PLC	480,970	441,551	504,289	490,996	387,479
Aida Cruise	55,473	60,966	71,148	77,805	67,978
Costa Cruises	22,102	17,595	19,227	2,422	17,351
Holland America	23,511	17,309	17,524	26,000	55,350
Norwegian Cruises	129,880	120,363	109,618	196,839	85,793
P & O Cruises	10,362	19,632	11,711	7,775	3,595
Princess Cruises	24,078	35,475	47,546	67,279	89,669
TOTAL	746,376	712,891	781,063	869,116	707,215
ROYAL CARIBBEAN	610,131	579,853	605,933	477,642	378,219
Celebrity Cruises	51,260	56,162	64,878	12,316	2,024
TUI Cruises	-	18,716	50,966	27,011	56,172
TOTAL	661,391	654,731	721,777	516,969	436,415
MSC CRUISES	36,741	129,671	204,070	240,214	237,377
DISNEY CRUISES	84,958	67,038	106,109	95,019	88,829
Other Cruise Lines	39,006	88,621	107,537	122,631	81,854
	1,568,472	1,652,952	1,920,556	1,843,949	1,551,690

Average Length of Stay

In 2019 the overall average intended length of stay for foreign nationals was 7.9 nights; which was less than the 8.1 nights in 2018. This is three 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 6.1 nights and those who stayed in non-hotel accommodation stayed 8.5 nights.

American visitors, on the average, stayed 6.6 nights while Canadians stayed an average of 8.7 nights. Visitors from the United Kingdom recorded an average length of stay of 14.1 nights and those visitors from Continental Europe stayed 11.4 nights. Visitor from Latin America stayed an average of 8.6 nights and those from the Caribbean stayed 12.1 nights.

	FOREIGN NATIONAL ARRIVALS	Average Length of Stay (Nights)
Hotel	1,831,759	6.1
Non-Hotel	127,450	8.5
Private Homes	496,166	14.2
Other	27,794	14.1
	2,483,169	7.9

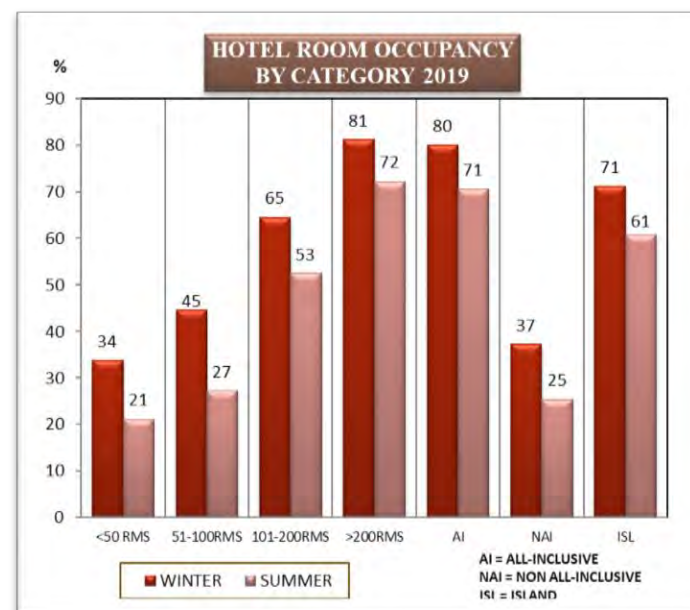
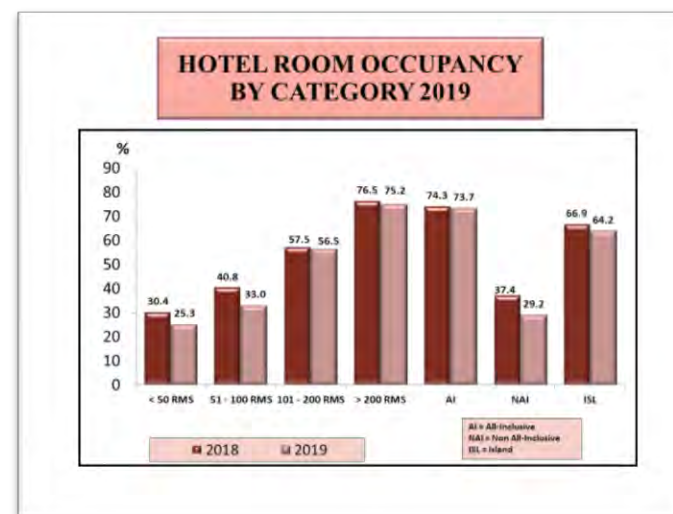
Hotel Room Occupancy

The average available room capacity rose by 3.5% in 2019, moving from 23,615 rooms in 2018 to 24,432 rooms in 2019. Total room nights sold of 5,727,936 in 2019 was down 0.7% below the 5,767,196 room nights sold in 2018. Hotel room occupancy decreased by 4.0 percentage points to 64.2%, compared to the 66.9% level in 2018. The number of stopovers that intended to stay in hotel accommodations increased from 1,721,682 in 2018 to 1,843,868, an increase of approximately 7.1% in 2019.

In the resort region of Montego Bay, the annual hotel room occupancy rate was 69.1%, compared to 68.7% recorded in 2018. The total number of room nights sold increased by 3.9% moving from 2,326,005 in 2018 to 2,416,049 in 2019. The average room capacity increased by 3.2% in 2019, moving from 9,277 rooms in 2018 to 9,578 rooms in 2019. The number of stopovers that intended to stay in Montego Bay at hotel accommodations increased from 748,671 in 2018 to 833,689, an increase of 11.4% in 2019.

The average hotel room occupancy rate for Ocho Rios was 66.8% which was 4.4 percentage points lower than the 70.0% recorded in 2018. The total number of hotel room nights sold moved from 1,601,371 in 2018 down to 1,490,992 in 2019 a decrease of 6.9%. The number of stopovers that intended to stay in Ocho Rios at hotel accommodations recorded a decrease of 2.0%, moving from 460,470 in 2018 down to 451,465 in 2019.

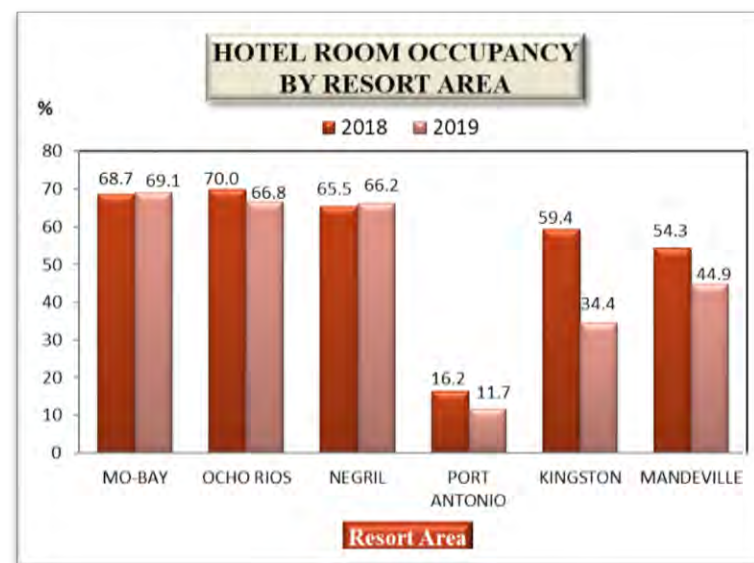
The resort area of Negril recorded an average hotel room occupancy rate of 66.2% in comparison to the rate of 65.5% in 2018. The number of hotel room nights sold in this resort area grew by 4.8%, recording 1,492,920 room nights sold compared 1,425,188 sold in 2018. The average room capacity increased by 3.5% in 2019, moving from 5,965 rooms in 2018 to 6,177 rooms in 2019. The number of stopovers that intended to stay in Negril at hotel accommodations increased from 410,665 in 2018 to 451,014, which was an increase of 9.8% in 2019.



In the Mandeville/Southcoast resort area, average hotel room occupancy rate fell by 9.4 percentage points, moving from 54.3% in 2018 to 44.9% in 2019. The average room capacity increased by 10.1% in 2019, moving from 683 rooms in 2018 to 752 rooms in 2019. Room nights sold fell from 135,338 in 2018 to 123,135 being sold in 2019.

Kingston & St. Andrew achieved a hotel room occupancy level of 34.4%, compared to 59.4% recorded in 2018. The average room capacity increased by 24.0% in 2019, moving from 1,240 rooms in 2018 to 1,537 rooms in 2019. The number of room nights sold in Kingston & St. Andrew decreased by 28.2%, moving from 268,750 in 2017 to 192,961 in 2019.

Hotel room occupancy for the resort area of Port Antonio was 11.7%, the number of room nights sold in Port Antonio rose from 10,546 in 2018 to 11,880 in 2019 and the average room capacity moved from 178 rooms in 2018 to 277 rooms in 2019.



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 2019.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 25.3%. Hotels with 51 – 100 rooms, achieved a rate of 33.0%. The number of stopovers that intended to stay in hotels with less than 100 rooms decreased from 138,404 in 2018 to 136,808, a decrease of 1.2% in 2019. Hotels in the size range of 101 – 200 rooms recorded an occupancy rate of 56.5%, and hotels with over 200 rooms achieved a room occupancy rate of 75.2%. The number of stopover arrivals that intended to stay in hotels with more than 100 rooms was 1,707,060 which was 7.8% higher than the 1,583,278 stopovers in 2018.

HOTEL UTILIZATION

HOTEL UTILIZATION

Average Room Capacity Available								
Resort Area	2015	2016	2017	2018	2019 +/-	2019/18	% Change 2019/18	% Share 2019
Montego Bay	7,304	7,576	8,961	9,277	9,578	301	3.2%	39.2%
Ocho Rios	4,971	5,920	6,007	6,272	6,111	(161)	-2.6%	25.0%
Negril	4,885	5,026	5,360	5,965	6,177	212	3.6%	25.3%
Port Antonio	114	145	184	178	277	99	55.6%	1.1%
Kingston & St. Andrew	1,139	1,261	1,337	1,240	1,537	297	24.0%	6.3%
Mandeville & Southcoast	592	614	704	683	752	69	10.1%	3.1%
Jamaica	19,005	20,542	22,553	23,615	24,432	817	3.5%	100.0%
Room Nights sold								
Resort Area	2015	2016	2017	2018	2019 +/-	2019/18	% Change 2019/18	% Share 2019
Montego Bay	1,947,392	1,851,573	2,233,331	2,326,003	2,416,049	90,046	3.9%	42.2%
Ocho Rios	1,252,434	1,409,603	1,474,617	1,601,371	1,490,992	(110,379)	-6.9%	26.0%
Negril	1,190,791	1,164,881	1,217,383	1,425,188	1,492,919	67,731	4.8%	26.1%
Port Antonio	7,490	6,948	9,055	10,546	11,880	1,334	12.6%	0.2%
Kingston & St. Andrew	258,799	263,161	277,749	268,750	192,961	(75,789)	-28.2%	3.4%
Mandeville & Southcoast	126,956	122,446	132,200	135,338	123,135	(12,203)	-9.0%	2.1%
Jamaica	4,783,862	4,818,612	5,344,335	5,767,196	5,727,936	(39,260)	-0.7%	100.0%
Room Occupancy								
Resort Area	2015	2016	2017	2018	2019 +/-	2019/18	% Change 2019/18	% Share 2019
Montego Bay	73.0%	66.8%	68.3%	68.0%	69.1%	1.1%	1.6%	1.2%
Ocho Rios	69.0%	65.1%	67.3%	70.0%	66.8%	-3.1%	-4.4%	-0.6%
Negril	66.8%	63.3%	62.2%	65.5%	66.2%	0.7%	1.1%	6.4%
Port Antonio	18.0%	13.1%	13.5%	16.2%	11.7%	-4.5%	-27.6%	-12.9%
Kingston & St. Andrew	62.3%	57.0%	56.9%	59.4%	34.4%	-25.0%	-42.1%	-39.6%
Mandeville & Southcoast	58.8%	54.5%	51.4%	54.3%	44.9%	-9.4%	-17.4%	-12.8%
Jamaica	69.0%	64.1%	64.9%	66.9%	64.2%	-2.7%	-4.0%	-1.1%

Average Room Capacity Available								
Category	2015	2016	2017	2018	2019 +/- 2019/18	% Change 2019/18	% Share 2019	
<= 50 rooms	1,954	1,958	2,319	2,411	2,751	340	14.1%	11.3%
51 - 100	1,819	2,070	2,204	2,068	2,063	(5)	-0.2%	8.4%
101 - 200	1,787	1,860	1,783	2,179	2,299	120	5.5%	9.4%
> 200 rooms	13,445	14,654	16,247	16,956	17,320	363	2.1%	70.9%
Jamaica	19,005	20,542	22,553	23,615	24,432	818	3.5%	100.0%
Package Plan:								
All-Inclusive	14,753	16,532	18,406	18,873	19,217	344	1.8%	78.7%
Non-All Inclusive	4,252	4,011	4,146	4,742	5,216	474	10.0%	21.3%
Jamaica	19,005	20,542	22,553	23,615	24,432	818	3.5%	100.0%
Room Nights sold								
Category	2015	2016	2017	2018	2019 +/- 2019/18	% Change 2019/18	% Share 2019	
<= 50 rooms	254,578	205,673	255,784	267,776	253,944	(13,832)	-5.2%	4.4%
51 - 100	310,024	268,679	303,044	308,157	248,565	(59,592)	-19.3%	4.3%
101 - 200	444,963	421,211	408,622	457,121	474,062	16,941	3.7%	8.3%
> 200 rooms	3,774,297	3,923,049	4,376,885	4,734,142	4,751,365	17,223	0.4%	83.0%
Jamaica	4,783,862	4,818,612	5,344,335	5,767,196	5,727,936	(39,260)	-0.7%	100.0%
Package Plan:								
All-Inclusive	4,080,116	4,258,123	4,773,318	5,119,379	5,172,600	53,221	1.0%	90.3%
Non-All Inclusive	703,746	560,489	571,017	647,817	555,335	(92,482)	-14.3%	9.7%
Jamaica	4,783,862	4,818,612	5,344,335	5,767,196	5,727,935	(39,261)	-0.7%	100.0%
Room Occupancy								
Category	2015	2016	2017	2018	2019 +/- 2019/18	% Change 2019/18	% Share 2019	
<= 50 rooms	35.7%	28.7%	30.2%	30.4%	25.3%	-5.1%	-16.8%	-16.2%
51 - 100	46.7%	35.5%	37.7%	40.8%	33.0%	-7.8%	-19.1%	-12.4%
101 - 200	68.2%	61.9%	62.8%	57.5%	56.5%	-1.0%	-1.7%	-10.0%
> 200 rooms	76.9%	73.1%	73.8%	76.5%	75.2%	-1.3%	-1.8%	1.8%
Jamaica	69.0%	64.1%	64.9%	66.9%	64.2%	-2.7%	-4.0%	-1.1%
Package Plan:								
All-Inclusive	75.8%	70.4%	71.1%	74.3%	73.7%	-0.6%	-0.7%	3.7%
Non-All Inclusive	45.3%	38.2%	37.7%	37.4%	29.2%	-8.2%	-22.0%	-22.6%
Jamaica	69.0%	64.1%	64.9%	66.9%	64.2%	-2.7%	-4.0%	-1.1%

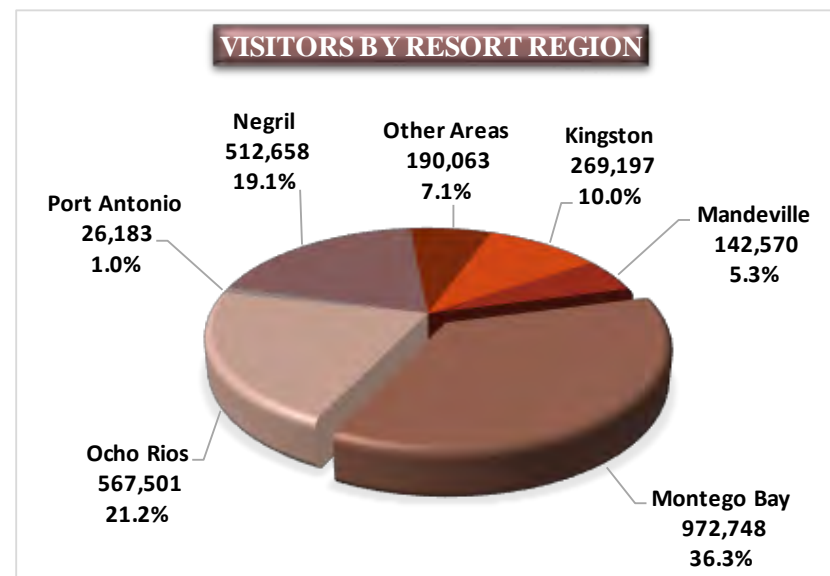
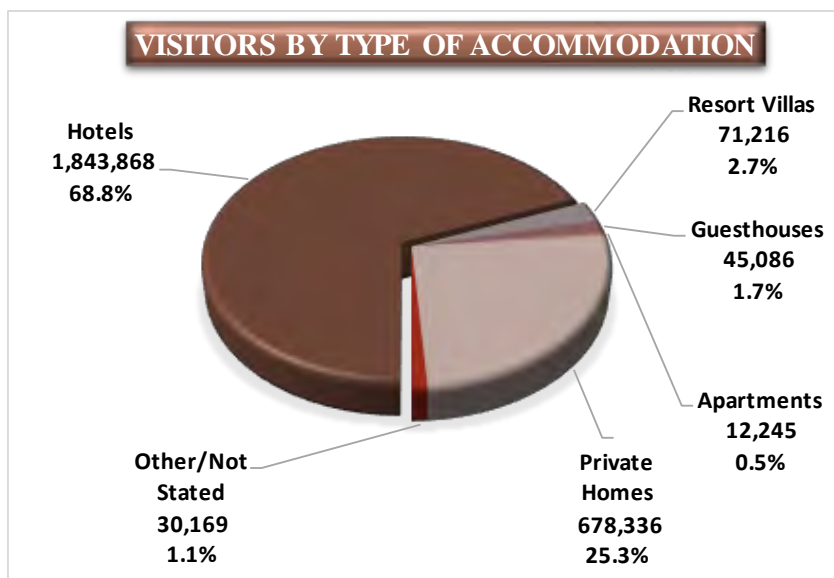
ACCOMMODATION STATISTICS

TOURIST ACCOMMODATION INVENTORY								
Category [# Properties]	2015	2016	2017	2018	2019 +/- 2019/18	% Change 2019/18	% Share 2019	
<= 50 rooms	107	109	116	113	123	10	8.8%	58.9%
51 - 100	32	34	32	31	27	(4)	-12.9%	12.9%
101 - 200	14	15	16	15	14	(1)	-6.7%	6.7%
> 200 rooms	37	40	43	44	45	1	2.3%	21.5%
All-Inclusive	66	72	77	74	76	2	2.7%	36.4%
Non-All Inclusive	124	126	130	129	133	4	3.1%	63.6%
All Hotels	190	198	207	203	209	6	3.0%	10.1%
Guest Houses	490	522	532	510	510	-	0.0%	24.8%
Resorts Villas	886	929	948	968	970	2	0.2%	47.1%
Apartments	294	369	401	371	371	-	0.0%	18.0%
Total Accommodation	1,860	2,018	2,088	2,052	2,060	8	0.4%	100.0%
Category [# Rooms]	2015	2016	2017	2018	2019 +/- 2019/18	% Change 2019/18	% Share 2019	
<= 50 rooms	2,740	2,745	2,908	2,857	3,379	522	18.3%	13.5%
51 - 100	2,152	2,318	2,250	2,218	1,889	(329)	-14.8%	7.5%
101 - 200	1,986	2,079	2,242	2,147	1,949	(198)	-9.2%	7.8%
> 200 rooms	14,576	15,770	16,742	17,869	17,876	7	0.0%	71.2%
All-Inclusive	16,360	17,834	18,738	19,933	19,510	(423)	-2.1%	77.8%
Non-All Inclusive	5,094	5,078	5,404	5,158	5,583	425	8.2%	22.2%
All Hotels	21,454	22,912	24,142	25,091	25,093	2	0.0%	76.5%
Guest Houses	3,396	3,737	3,829	3,726	3,730	4	0.1%	11.4%
Resorts Villas	2,944	3,074	3,162	3,204	3,165	(39)	-1.2%	9.6%
Apartments	614	679	718	818	811	(7)	-0.9%	2.5%
Total Accommodation	28,408	30,402	31,851	32,839	32,799	(40)	-0.1%	100.0%

* Excluding closed properties

VISITORS TO JAMAICA BY TYPE OF ACCOMMODATION 2019

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Port Antonio	Negril	Other Areas	Total	% Share	Average Length of Stay
Hotels	69,038	36,593	833,689	451,465	1,338	451,014	731	1,843,868	68.8%	6.1
Resort Villas	5	4,592	34,938	18,173	3,099	10,390	19	71,216	2.7%	7.7
Guesthouses	9,759	3,546	10,730	5,084	1,386	13,208	1,373	45,086	1.7%	12.2
Apartments	1,017	-	4,107	6,360	-	761	-	12,245	0.5%	35.9
Private Homes	181,873	94,619	80,099	81,345	19,484	34,312	186,604	678,336	25.3%	15.1
Other/Not Stated	7,505	3,220	9,185	5,074	876	2,973	1,336	30,169	1.1%	16.2
Total	269,197	142,570	972,748	567,501	26,183	512,658	190,063	2,680,920	100.0%	8.8
% Share	10.0%	5.3%	36.3%	21.2%	1.0%	19.1%	7.1%	100.0%		
Average Length of Stay	11.4	13.4	6.6	8.0	15.0	7.6	14.8	8.6		



Airlift Statistics

TOTAL AIR CAPACITY, PASSENGERS AND LOAD FACTORS													
Capacity Available (Seats)	2016	2017	2018	2019	+ / -	% Change 2019/18	Passengers Carried	2016	2017	2018	2019	+ / -	% Change 2019/18
January	315,882	318,190	326,015	346,718	20,703	6.4%	January	229,662	238,827	250,195	271,609	21,414	8.6%
February	297,828	279,218	294,937	319,130	24,193	8.2%	February	215,547	217,466	226,794	257,573	30,779	13.6%
March	319,111	318,007	337,915	377,975	40,060	11.9%	March	257,411	248,679	272,715	312,730	40,015	14.7%
Q1	932,821	915,415	958,867	1,043,823	84,956	8.9%	Q1	702,620	704,972	749,704	841,912	92,208	12.3%
April	247,266	302,985	309,627	324,096	14,469	4.7%	April	186,312	250,713	246,043	274,281	28,238	11.5%
May	255,922	267,804	291,663	291,696	33	0.0%	May	201,965	213,707	231,118	244,561	13,443	5.8%
June	273,953	288,533	309,220	309,041	(179)	-0.1%	June	228,225	245,423	262,677	274,427	11,750	4.5%
Q2	777,141	859,322	910,510	924,833	14,323	1.6%	Q2	616,502	709,843	739,838	793,269	53,431	7.2%
July	305,304	327,834	344,040	350,827	6,787	2.0%	July	268,643	290,867	299,202	313,345	14,143	4.7%
August	289,031	304,248	322,992	334,939	11,947	3.7%	August	244,723	269,042	284,277	294,771	10,494	3.7%
September	217,026	215,819	241,719	241,926	207	0.1%	September	175,134	183,175	186,720	201,079	14,359	7.7%
Q3	811,361	847,901	908,751	927,692	18,941	2.1%	Q3	688,500	743,084	770,199	809,195	38,996	5.1%
October	222,353	235,054	260,559	259,023	(1,536)	-0.6%	October	176,332	199,543	206,538	220,492	13,954	6.8%
November	253,220	276,452	290,652	292,901	2,249	0.8%	November	208,394	229,016	245,686	245,726	40	0.0%
December	327,787	343,753	351,546	383,432	31,886	9.1%	December	283,248	304,843	318,856	341,843	22,987	7.2%
Q4	803,360	855,259	902,757	935,356	32,599	3.6%	Q4	667,974	733,402	771,080	808,061	36,981	4.8%
Year	3,324,683	3,477,897	3,680,885	3,831,704	150,819	4.1%	Year	2,675,596	2,891,301	3,030,821	3,252,437	221,616	7.3%

Load Factor (% of seats filled)	2016	2017	2018	2019	+ / -	% Change 2019/18
January	72.7%	75.1%	76.7%	78.3%	1.6%	2.1%
February	72.4%	77.9%	76.9%	80.7%	3.8%	5.0%
March	80.7%	78.2%	80.7%	82.7%	2.0%	2.5%
Q1	75.3%	77.0%	78.2%	80.7%	2.5%	3.2%
April	75.3%	82.7%	79.5%	84.6%	5.2%	6.5%
May	78.9%	79.8%	79.2%	83.8%	4.6%	5.8%
June	83.3%	85.1%	84.9%	88.8%	3.9%	4.5%
Q2	79.3%	82.6%	81.3%	85.8%	4.5%	5.6%
July	88.0%	88.7%	87.0%	89.3%	2.3%	2.7%
August	84.7%	88.4%	88.0%	88.0%	0.0%	0.0%
September	80.7%	84.9%	77.2%	83.1%	5.9%	7.6%
Q3	84.9%	87.6%	84.8%	87.2%	2.5%	2.9%
October	79.3%	84.9%	79.3%	85.1%	5.9%	7.4%
November	82.3%	82.8%	84.5%	83.9%	-0.6%	-0.8%
December	86.4%	88.7%	90.7%	89.2%	-1.5%	-1.7%
Q4	83.1%	85.8%	85.4%	86.4%	1.0%	1.1%
Year	80.5%	83.1%	82.3%	84.9%	2.5%	3.1%

AIRLINES SERVING JAMAICA

SCHEDULED SERVICE	2017	2018	2019	SCHEDULED SERVICE	2017	2018	2019
AEROGRAVITA	Havana	Havana Santiago de Cuba	Havana Santiago de Cuba	JETBLUE	Boston Ft. Lauderdale New York Orlando	Boston Ft. Lauderdale New York Orlando	Boston Ft. Lauderdale New York Orlando
AIR CANADA / ROUGE	Montreal Quebec Toronto Winnipeg	Montreal Toronto Winnipeg	Montreal Toronto Winnipeg	LATAM AIRLINES			Lima, Peru
AIRTRANSAT	Halifax Montreal Toronto	Halifax Montreal Toronto	Halifax Montreal Toronto	NEOS	Milan Verona	Milan Verona	Milan Verona
AMERICAN AIRLINES	Boston Charlotte Chicago Dallas Los Angeles Miami Philadelphia	Boston Charlotte Chicago Dallas Los Angeles Miami Philadelphia	Boston Charlotte Chicago Dallas Miami New York Philadelphia	SOUTHWEST AIRLINES	Baltimore Chicago Ft. Lauderdale Houston Orlando	Baltimore Chicago Ft. Lauderdale Houston Orlando	Atlanta Baltimore Chicago Ft. Lauderdale Hobby, Houston Orlando St. Louis
AIR SUNSHINE / SHARK / LYNX AIR	Guantanamo Bay	Guantanamo Bay	Guantanamo Bay	SPIRIT AIRLINES	Ft. Lauderdale	Baltimore Detroit Ft. Lauderdale	Baltimore Detroit Ft. Lauderdale Orlando
BLUE PANORAMA	Malpensa/Milan	Malpensa/Milan		SUNWING AIRLINES	Calgary Cincinnati Edmonton Halifax Hamilton Montreal Ontario Ottawa Regina Saskatoon St. Johns Toronto Vancouver Windsor Winnipeg	Calgary Cincinnati Edmonton Halifax Hamilton Moncton Montreal Ottawa Regina Saskatoon St. Johns Toronto Vancouver Winnipeg	Atlanta Buffalo Calgary Cincinnati Detroit Edmonton Halifax Hamilton London Moncton Montreal New Orleans Ottawa Regina Saskatoon St. Johns Sudbury Toronto Vancouver Windsor Winnipeg/London
BRITISH AIRWAYS	London/Gatwick	London/Gatwick	London/Gatwick	SWOOP AIRLINES		Hamilton	Hamilton
CARIBBEAN AIRLINES	Antigua Barbados Ft. Lauderdale Nassau New York Orlando St. Maarten Toronto	Antigua Barbados Ft. Lauderdale Nassau New York Orlando Toronto	Barbados Ft. Lauderdale Grand Cayman Nassau New York Orlando Port of Spain Toronto	TUI AIRLINES / ARKEFLY AIR	Amsterdam Warsaw	Amsterdam Warsaw	Amsterdam Warsaw
CAYMAN AIRLINES	Grand Cayman	Grand Cayman	Grand Cayman	TUI AIRLINES / JET AIRFLY	Brussels	Brussels	Brussels
COPA	Panama	Panama	Panama	UNITED AIRLINES	Chicago Houston Newark Washington D.C.	Chicago Houston Newark Washington D.C.	Chicago Houston Newark Washington D.C.
CONDOR	Frankfurt Munich	Dusseldorf Frankfurt Munich	Dusseldorf Frankfurt Munich	VIRGIN ATLANTIC	London/Gatwick	London/Gatwick	London/Gatwick
DELTA AIRLINES	Atlanta Boston Cincinnati Detroit Minneapolis New York Tampa	Atlanta Boston Detroit Minneapolis New York	Atlanta Boston Detroit Minneapolis New York	WEST JET	Montreal Ottawa Toronto Winnipeg	Calgary Ottawa Toronto Winnipeg	Calgary Ottawa Toronto Winnipeg
EUROWINGS	Cologne	Cologne Dusseldorf Munich	Dusseldorf Munich				
FLY JAMAICA	New York Guyana Toronto	New York Guyana Toronto					
FRONTIER AIRLINES		Raleigh, NC	<Chartered Operation>				
INTERCARIBBEAN / AIR TURKS & CAICOS	Providenciales Carib. Islands	Providenciales	Providenciales Havana Santo Domingo				
INSEL AIR	Curacao						

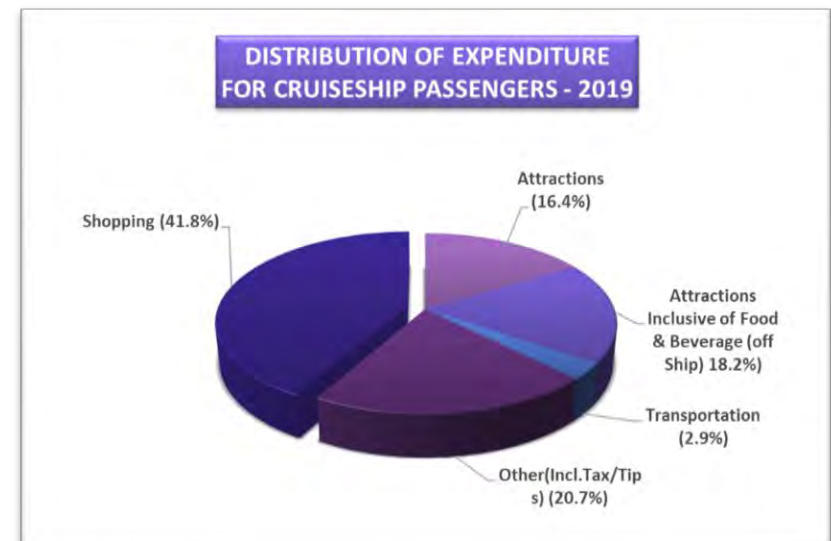
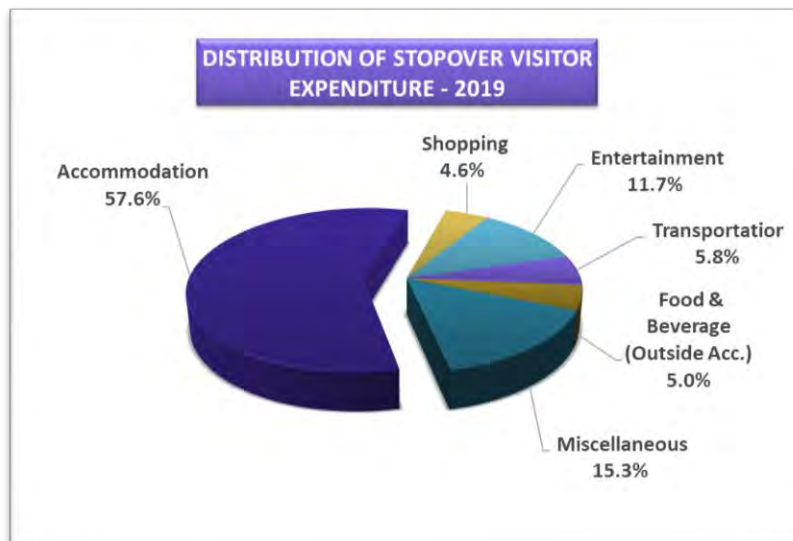
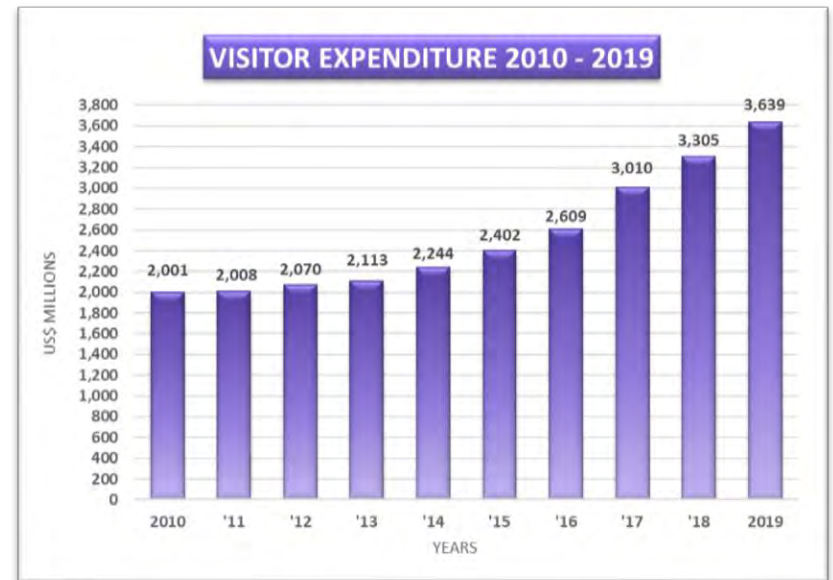
CHARTERED SERVICE	2017	2018	2019	CHARTERED SERVICE	2017	2018	2019
Aerodesierto			Pisco, Peru	Sun Country	Minneapolis	Minneapolis	Cincinnati
Aereos Servicios	Dom. Rep.				Chicago	Fargo	Dallas
Air Berlin	Dusseldorf				Fargo	Sioux Falls	Minneapolis
Air Century	Cancun	Barbados	Antigua		St. Louis		Indianapolis
	Dom. Rep.	Dom. Rep.	Barbados	Swift Air	Tallahassee		
	Holguin	Havana	Cancun		Atlanta	Atlanta	Atlanta
	Puerto Plata	Punta Cana	Havana		Barbado	Chicago	Baton Rouge
	Punta Cana		La Ramona, Dom. Rep.		Cincinnati	Cincinnati	Cincinnati
	Santo Domingo		Puerto Plata		Cleveland	Cleveland	Louisville
	Varadero		Punta Cana		Dallas	Dallas	Nashville
			Santo Domingo		Guyana	Lansing	New Orleans
Avianca	Quito, Ecuador				Milwaukee	Milwaukee	Newark
Bahamas Air	Nassau				Nashville	Nashville	Pittsburgh
Condor [Intransit Cruise Passengers]	Dusseldorf	Dusseldorf	Dusseldorf		Pittsburgh	Pittsburgh	
	Frankfurt	Frankfurt	Frankfurt	Thomas Cook	St. Kitts & Nevis	Rockford	
	Munich	Munich	Munich		Turks & Caicos	St. Louis	
Evelop Airlines	Madrid	Madrid		Thompson Fly	Arlanda, Sweden	Arlanda, Sweden	Manchester
Frontier Airlines			Philadelphia				Arlanda, Sweden
			Raleigh, NC				
Miami Air	Antigua	Hartford, CT	Indianapolis		Birmingham	Birmingham	Birmingham
	Indianapolis	Miami	Jacksonville		Dublin	Cardiff	Cardiff
	Miami	Milwaukee	Lansing		Glasgow	East Midlands	Dacaster
		Portsmouth, NH	Milwaukee		London/Gatwick	Glasgow	East Midlands
Norwegian Airlines	Chicago				Manchester	London/Gatwick	Glasgow
	Milwaukee				Stantead	Manchester	Newcastle
Norwind		Sheremetyevo, Russia	Sheremetyevo, Russia		Stockholm, Sweden	Newcastle	Stanstead
Orbest Air	Lisbon	Lisbon	Lisbon		Doncaster		London/Gatwick
Sap Airlines			Santo Domingo				Manchester

Visitor Expenditure

Gross visitor expenditure in 2019 was provisional at approximately US\$3.638 billion. This represents an increase of 10.3% against the estimated US\$3,305 billion earned in 2018.

Total expenditure of Foreign Nationals amounted to US\$3,375 billion. Cruise passenger expenditure totaled US\$0.156 billion while US\$0.107 billion was estimated as the contribution of Non-Resident Jamaicans.

Foreign Nationals spent on the average US\$168.62 per person per night while cruise passengers spent an average of US\$101.81 per person.

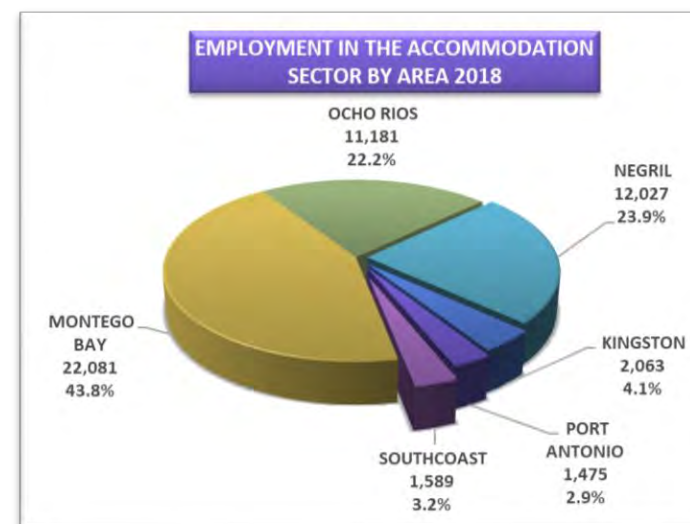


Direct Employment in the Accommodation Sector

The number of persons employed directly in the accommodation sub-sector moved from 50,416 in 2018 to 51,226 in 2019, an increase of 1.6%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 45,865 persons or 89.5% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 22,367 direct jobs represented 43.7% of those employed, Negril with 11,784 direct jobs, accounted for 23.0%, and Ocho Rios with 11,714, was responsible for 22.9%. Kingston, Port Antonio and the South coast accounted for the remaining 10.5% of employment in the accommodation sector.

The average number of employees per room in 2019 was estimated at 1.56.



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.