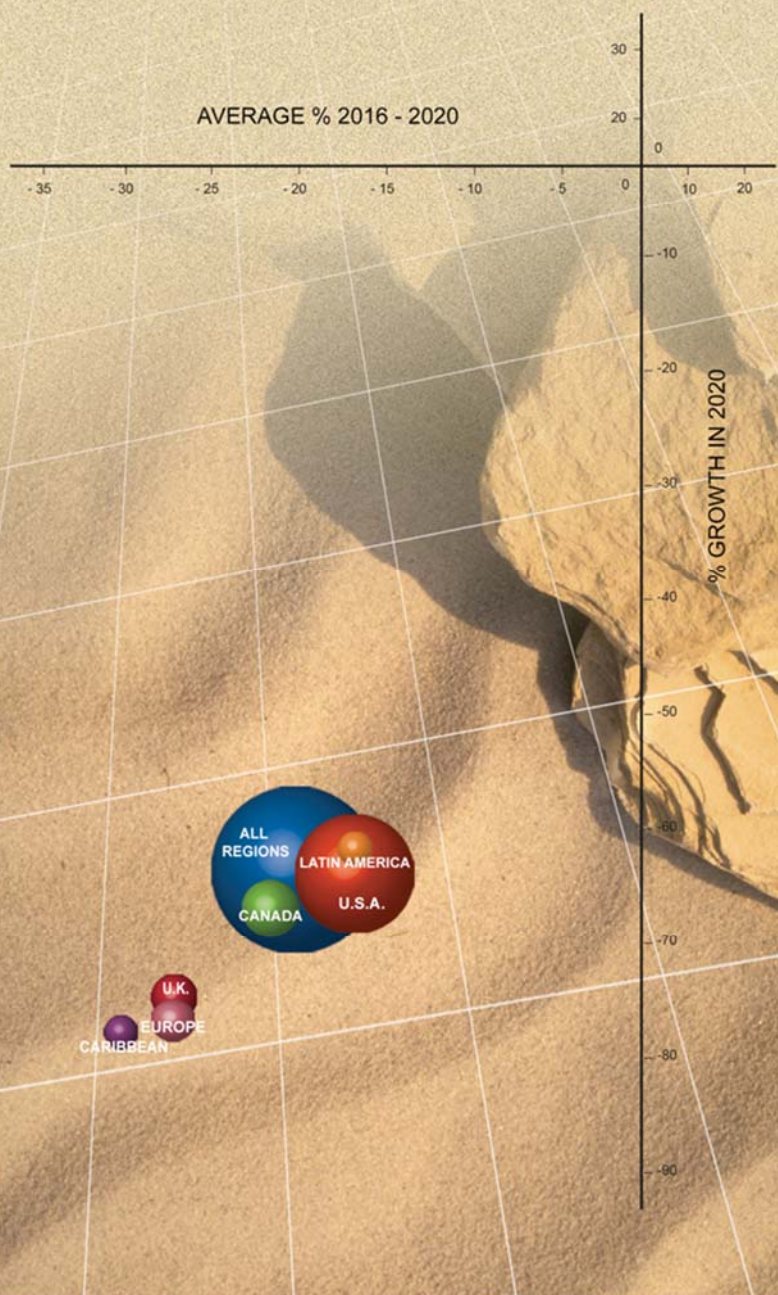


JAMAICA

TOURIST BOARD

Annual Travel Statistics 2020



www.visitjamaica.com

Table of Contents	Page #
Definitions and Introduction	3 - 5
International Travel	6
Caribbean Performance	7 - 8
Summary of Main Indicators	9
Jamaica's Performance	
Visitor Arrivals	10
Main Factors Impacting Performance 2020	11
Visitor Arrivals 1980 - 2020	12
Stopover Arrivals by Month and Year 2014 - 2020	
5-Year Monthly Seasonality	13
Type of Visitor 2014 - 2020	13
Cruise Passenger Arrivals by Month and Year 2014 - 2020	
5-Year Monthly Seasonality	14
% Share & Port of Arrival 2015 - 2020	14
Stopover Arrivals by Purpose of Visit	
Year of Arrival 2014 - 2020	15
Type of Visitor 2020	15
Main Market 2020	15
Market Performance	
United States	16 - 18
Canada	19 - 21
United Kingdom / Europe	22 - 24
Latin America	25 - 26
Caribbean / Other Countries	27 - 28
Cruise Passengers	29 - 30
Average Length of Stay	31
Hotel Room Occupancy	32 - 33
Hotel Utilization	34 - 35
Accommodation Statistics	36 - 37
Airlift Statistics	38 - 40
Visitor Expenditure	41
Direct Employment in Accommodation Sector	42
New Developments	42

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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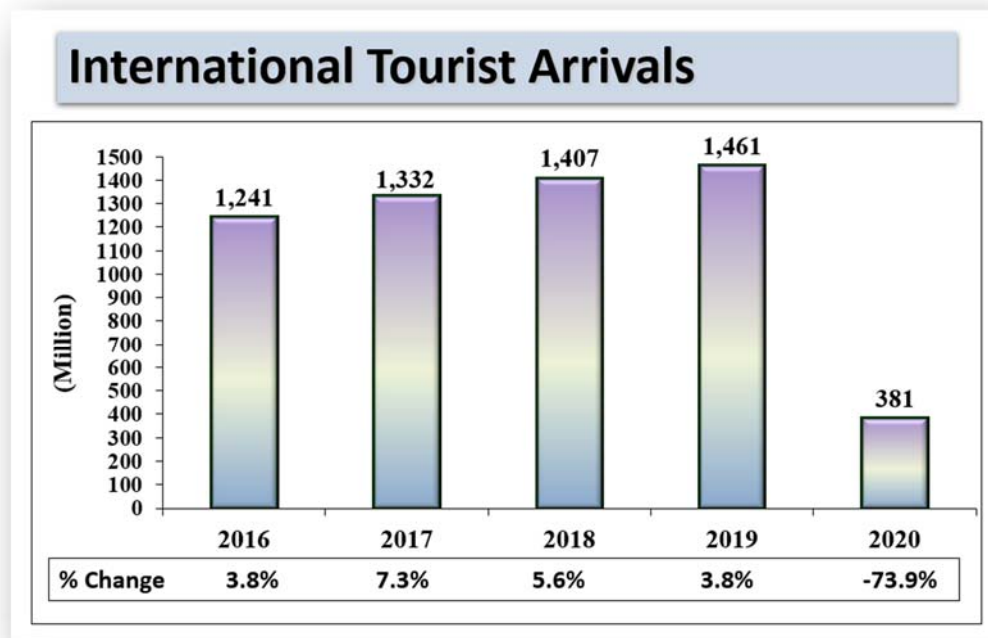
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INTERNATIONAL

The year 2020 suffered the greatest crisis on record in international travel worldwide. The outbreak of the COVID-19 pandemic created an unprecedented health, social and economic emergency. The World Tourism Organization (UNWTO) reported that international tourist arrivals plunged by 74.0% in 2020 compared to the same period in 2020, reaching a low of 381 million.¹



Source: World Tourism Organization (UNWTO)

As a result, over 1,080 million less international tourists travelled the world in 2020, due to widespread travel restrictions and the massive drop in travel demand, as compared to the 1,481 million international tourists in 2019. This level of international arrivals was last recorded over 30 years ago. The collapse in international travel in 2020 represents an estimated loss of US\$1.3 trillion in total export revenues, which translates into an economic loss of US\$2 trillion in direct tourism gross domestic product, more than 2% of the world's GDP. The crisis has put 100 to 120 million direct tourism jobs at risk, many of them in small and medium-sized enterprises and with a high share of women and youth.

All world regions recorded declines in international tourist arrivals for 2020. The lowest declines were registered in Asia and the Pacific, the Middle East, and Africa, with -84.1%, -75.1%

and -74.6% respectively. At rather lower rates of declines was Europe, with -70.4%, and the Americas, with -68.5%. Europe, the most visited region with over half the world's international tourist, saw a decrease of 525.1 million arrivals in 2020, reaching a total of 221.2 million. The second most visited region in the world, Asia and the Pacific decreased by 303.2 million less arrivals to a total of 57.2 million. The Americas, to which Jamaica is a part, recorded a decline of 150.1 million international tourists lowering the total to 69.0 million.

¹ UNWTO World Tourism Barometer – Volume 19 January 2021.
Overview 2020

CARIBBEAN

The Caribbean Tourism Organization (CTO) reported that in 2020 there was an estimated 11.1 million visitors who came to 'enjoy the un-equalled and diverse experiences' the Caribbean had to offer. This was a contraction of approximately 21.0 million less tourist arrivals, a 65.5% decrease over the 32.0 million in 2019 ²

With the discovery of the COVID-19 virus in the region, international tourist arrivals contracted sharply. At the end of the 1st quarter arrivals fell by 21.8%. By the 2nd quarter tourist arrivals stalled, prematurely ending the high season for the region recording a decline of 97.3%, underscoring the border closures and lockdowns across the region. During the 3rd quarter the monthly declines began to improve relative to the previous months. Caribbean destinations began to re-open and institute protocols for safe travel. In the 4th and last quarter, the strongest performance since the start of the year were recorded. It is estimated that a total of 2.2 million arrivals visited the Caribbean during this period.

International tourist arrivals were down in all major sub-regions within the Caribbean. No destination recorded growth for 2020, all had travel restrictions, border and port closures, so as to contain the spread of COVID-19. The performances by major markets were lower. The US market declined by 64.9% Canada declined by 61.7, Europe declined by 67.1% and all other counties decreased by 67.3%.

CARIBBEAN TOURIST ARRIVALS



TOURIST ARRIVALS TO THE CARIBBEAN BY SUB-REGIONS			
SUB-REGION	2019	2020	%CH.
COMMONWEALTH CARIBBEAN	9,240.0	2,706.3	-70.7%
DUTCH CARIBBEAN	2,079.4	734.2	-64.7%
FRENCH CARIBBEAN	1,289.5	625.6	-51.5%
US TERRITORIES	3,942.7	1,806.3	-54.2%
OTHER CARIBBEAN	15,463.9	5,178.3	-66.5%
TOTAL TOURIST ARRIVALS ('000)	32,015.5	11,050.7	-65.5%
Source Caribbean Tourism Organization			

CARIBBEAN TOURISM PERFORMANCE BY MAIN MARKET REGIONS						
MAJOR MARKET	2016	2017	2018	2019	2020	%CH.
USA	14,638.0	14,735.1	14,404.8	15,666.9	5,502.0	-64.9%
CANADA	3,309.0	3,321.9	3,372.0	3,424.2	1,310.2	-61.7%
EUROPE	5,732.3	5,965.9	6,010.0	5,925.5	1,950.3	-67.1%
OTHER	6,027.8	6,548.8	6,889.0	6,998.9	2,288.2	-67.3%
TOTAL TOURIST ARRIVALS ('000)	29,707.1	30,571.7	30,675.8	32,015.5	11,050.7	-65.5%
Source Caribbean Tourism Organization						

² Caribbean Tourism performance review 2020.
Overview 2020

With the suspension of cruise activities in mid-March, the industry was brought to a halt for 2020 by the COVID-19 pandemic. Cruise visits to the Caribbean region fell by 72.0% compared to the same period of 2019. Regional destinations received an estimated 8.5 million cruise visits during the time ships were able to sail. Fifteen of the twenty-four destinations recorded increased cruise activity in 2020 over 2019. 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.

Destination	2017	2018	2019	2020	% Change
Bahamas	4,626.3	4,877.6	5,429.5	1,327.1	-75.6%
Cozumel (Mexico)	4,103.8	4,265.5	4,569.5	1,131.6	-75.2%
Cayman Islands	1,728.4	1,921.1	1,831.0	535.7	-70.7%
Puerto Rico	1,229.1	1,658.8	1,784.9	465.4	-73.9%
Jamaica	1,923.3	1,845.9	1,552.3	449.3	-71.1%
US Virgin Islands	1,317.2	1,430.7	1,433.1	440.4	-69.3%
St. Maarten	1,237.8	1,597.1	1,631.5	435.5	-73.3%
Dominican Republic	1,108.0	982.3	1,103.9	344.5	-68.8%
Belize	1,014.2	1,208.1	1,170.6	343.1	-70.7%
St. Lucia	668.0	760.3	786.7	297.9	-62.1%
Aruba	792.4	815.2	832.0	259.4	-68.8%
Antigua and Barbuda	792.9	794.6	733.5	259.4	-64.6%
Curacao	634.4	757.3	809.9	256.0	-68.4%
Barbados	681.2	675.8	686.8	250.5	-63.5%
British Virgin Islands	409.7	200.6	575.1	219.4	-61.8%
Turks & Caicos Islands	827.4	1,021.7	1,111.8	205.9	-81.5%
Martinique	405.6	392.6	257.8	170.4	-33.9%
Grenada	299.4	342.8	337.9	162.5	-51.9%
Dominica	157.0	134.5	229.7	118.0	-48.6%
St. Vincent & the Grenadines	174.2	217.9	191.8	101.6	-47.0%
Bermuda	418.0	484.3	535.5	6.5	-98.8%

Source: CTO data supplied by member countries

A subset of the cruise passenger arrivals in 2020 are compared with 2020 figures.

Summary of Main Indicators 2020

PERCENTAGES ARE % CHANGE COMPARING 2020 WITH 2019

STOPOVER ARRIVALS 880,404 -67.2%
FOREIGN NATIONAL 798,290 -67.9%
NON-RESIDENT JAMAICANS 82,114 -58.5%

**STOPOVER ARRIVALS
PORT OF ARRIVAL**
MONTEGO BAY 696,754 -67.4%
KINGSTON 183,650 -66.2%

TOTAL ARRIVALS 1,329,675 -68.6%

CRUISE ARRIVALS 449,271 -71.1%

OCHO RIOS 229,311 -61.5%

MONTEGO BAY 100,248 -74.3%

FALMOUTH 115,439 -79.6%

STOPOVER ARRIVALS % Change % Share

UNITED STATES 637,505 -65.3% 72.4%

CANADA 132,014 -66.6% 15.0%

EUROPE 78,225 -75.6% 7.9%

CARIBBEAN 15,685 -78.2% 1.8%

LATIN AMERICA 13,827 -64.4% 1.6%

ASIA & PACIFIC 1,554 -82.0% 0.2%

OTHER COUNTRIES 6,461 -2.0% 0.2%

**AVERAGE LENGTH OF STAY IN
ALL ACCOMMODATIONS**
9.4 NIGHTS

HOTELS
6.3 NIGHTS

AIR CAPACITY
1,685,524 SEATS -56.1%
% LOAD FACTOR
63.5% -25.2%

TOURIST ACCOMMODATIONS 25,210 ROOMS -23.1%
HOTELS ROOMS 25,210 18.3%
% HOTEL ROOM OCCUPANCY 35.9% -44.2%
EMPLOYMENT IN ACCOMMODATION approximately 30% re-engaged

TOTAL VISITOR EXPENDITURE (STOPOVER & CRUISE) US\$ 1,256M -65.5%

STOPVERS US\$ 1,210.6M -65.2%

CRUISE US\$ 45.5M -70.9%

VISITOR ARRIVALS 2006 - 2020



TOTAL ARRIVALS

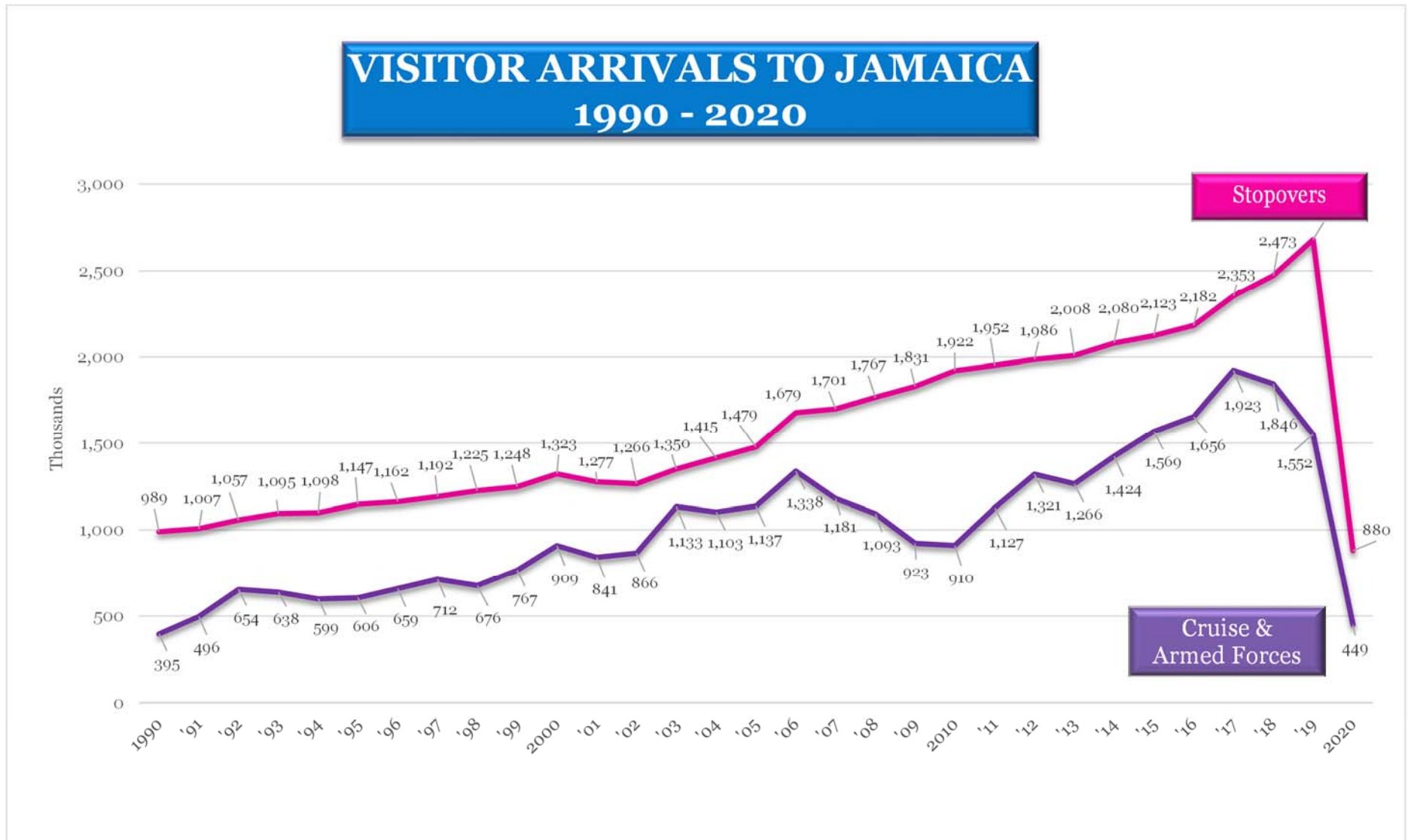
Total visitor arrivals for the year 2020 reached a total of 1,329,675, which was 68.6% below the 4,234,150 arrivals recorded in 2019. This figure represents 2,903,595 less arrivals than in 2019. In the first quarter of 2020, Jamaica recorded a 23.5% decline in total arrivals over the 2019 figures. During the second quarter this growth fell significantly to -99.2% and in the third quarter this growth moved down by -86.5%. In the last and final quarter of 2020, this growth fell again by -83.1%.

The main factors that may be identified as having had an impact on Jamaica's stopover arrivals during 2020 were as follows:

- The global health crisis associated with the COVID-19 pandemic significantly impacted visitor arrivals to Jamaica.
- International travel came to a near complete halt in March 2020, with most complete to partial closure of international borders and all world destinations implemented restrictions to travel.
- 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 maintain the destinations relevance, digital marketing content was produced, and various digital activations were deployed across the organization's social media channels. The JTB leveraged the assets and produced a new campaign to encourage domestic travel during the summer holiday period. This Local Recovery Campaign – popularly known as Rediscover JAMAICA supported local partners' efforts to instill confidence among local Jamaica residents of the adherence to tourism safety protocols within the local industry and provided another opportunity to restart the local tourism economy. 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.

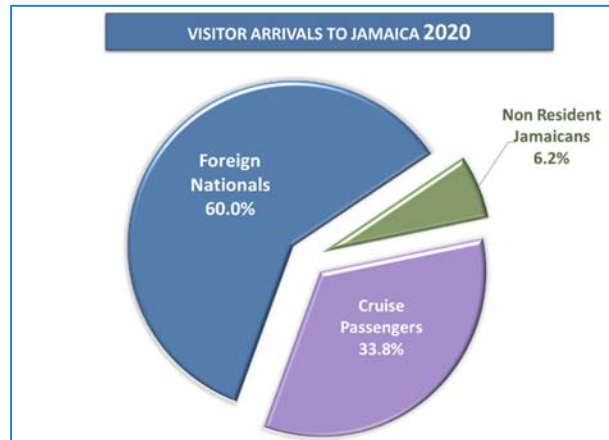
Destination Jamaica continues to offer a diverse product of very high quality to its visitors, through its expansive and inclusive nature in 2020. The wide range of hotels, attractions and activities has allowed Jamaica to deliver on visitor expectations, unequalled visitor experiences and provide value for money.

Visitor Arrivals over the years



Stopover arrivals of 80,404 decreased by 67.2%.

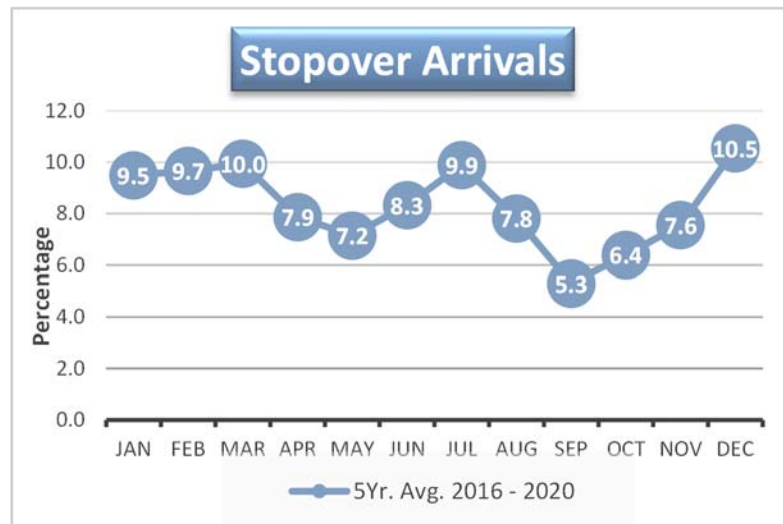
Foreign National of 798,290 decreased by 67.9%. Non-Resident Jamaicans of 82,114 decreased by 58.5%. Cruise passenger arrivals of 449,271 decreased by 71.1%.



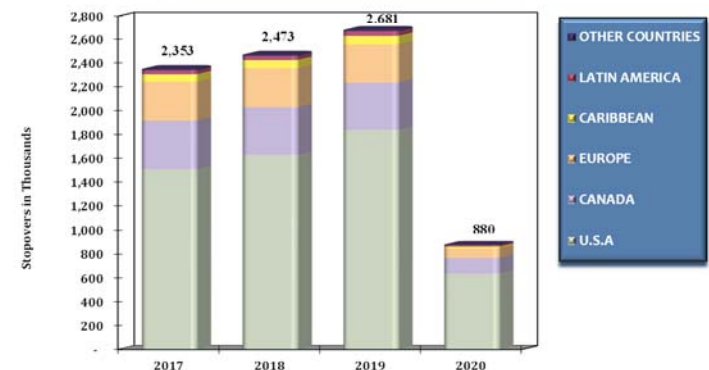
Stopover Arrivals by Month and Year of Arrival 2016 - 2020

	2016	2017	2018	2019	2020
January	179,559	185,873	194,609	216,509	227,200
February	185,272	186,670	193,575	220,046	235,740
March	219,673	212,600	236,818	271,742	111,191
April	188,604	205,822	204,734	232,834	0
Jan.-Apr.	773,108	790,965	829,736	941,131	574,131
May	167,884	181,669	195,491	210,664	0
June	194,088	211,119	229,261	238,888	7,188
July	228,169	248,626	257,050	270,462	41,941
August	169,023	192,878	206,034	214,780	43,813
September	120,340	131,416	134,910	144,583	28,648
October	135,467	157,380	162,552	176,514	45,106
November	163,152	187,062	196,546	202,783	49,413
December	230,453	251,800	261,147	281,115	90,164
May - Dec.	1,408,576	1,561,950	1,642,991	1,739,789	306,273
Jan. - Dec.	2,181,684	2,352,915	2,472,727	2,680,920	880,404
% Inc./Dec.	2.8	7.8	5.1	8.4	-67.2

Seasonality of Stopover Arrivals



STOPOVER VISITORS BY MARKET SHARE 2017 - 2020

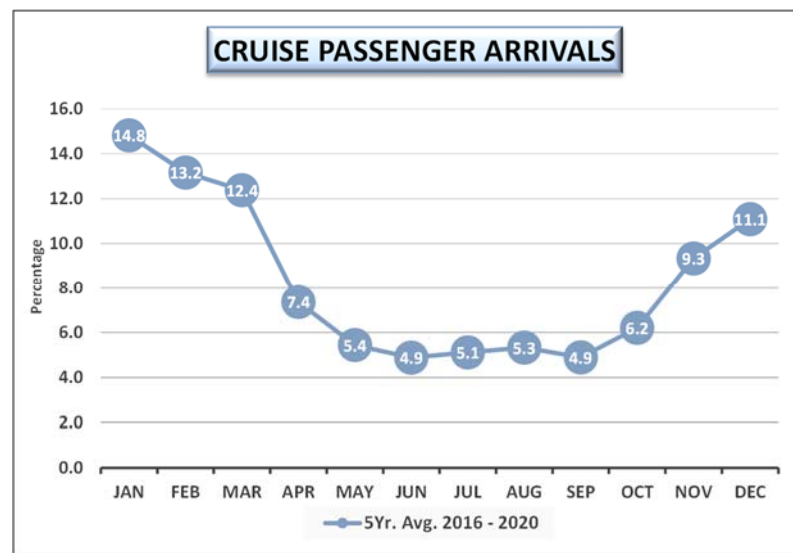


Countries	Stopovers in Thousands								zChange 2020/19
	2017	zShare	2018	zShare	2019	zShare	2020	zShare	
U.S.A.	1,510.0	64.2	1,628.4	65.9	1,838.9	68.6	637.5	72.4	-65.3
Canada	405.2	17.2	400.0	16.2	395.6	14.8	132.0	15.0	-66.6
Europe	325.8	13.8	328.4	13.3	320.6	12.0	78.2	8.9	-75.6
Caribbean	63.9	2.7	67.5	2.7	71.8	2.7	15.7	1.8	-78.2
Latin America	32.2	1.4	33.9	1.4	38.9	1.5	13.8	1.6	-64.4
Other Countries	15.8	0.7	14.6	0.6	15.1	0.6	3.1	0.4	-79.2
Total	2,352.9	100.0	2,472.7	100.0	2,680.9	100.0	880.4	100.0	-67.2

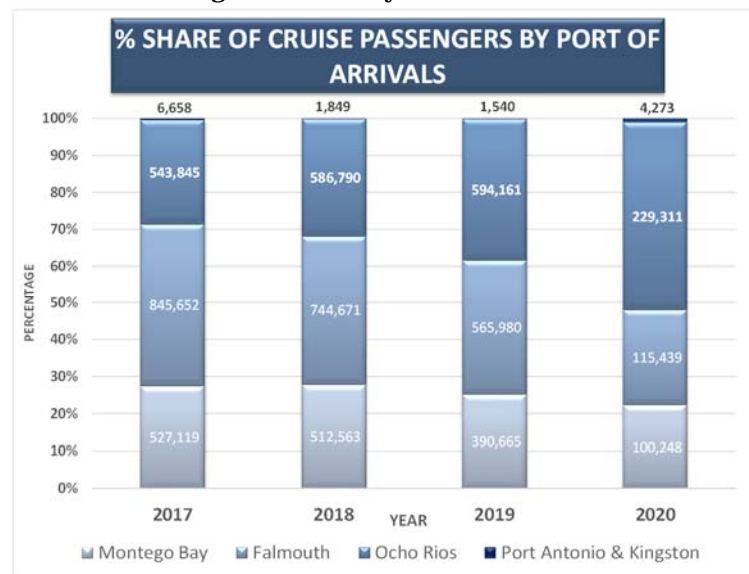
Cruise Passenger Arrivals by Month and Year of Arrival 2016 – 2020

	2016	2017	2018	2019	2020
January	186,741	205,812	249,635	249,026	209,163
February	197,467	192,664	210,667	202,830	173,981
March	229,111	234,251	213,193	176,409	66,127
April	131,898	141,792	139,282	133,591	0
Jan.-Apr.	745,217	774,519	812,777	761,856	449,271
May	94,577	110,712	124,781	73,680	0
June	110,086	93,453	92,323	66,552	0
July	88,015	110,034	104,127	77,560	0
August	99,677	109,074	105,827	80,986	0
September	86,033	132,551	84,228	60,416	0
October	90,233	150,076	121,975	98,884	0
November	159,383	234,643	173,291	126,136	0
December	182,341	208,212	226,544	206,276	0
May - Dec.	910,345	1,148,755	1,033,096	790,490	0
Jan. - Dec.	1,655,562	1,923,274	1,845,873	1,552,346	449,271
% Inc./Dec.	5.5%	16.2%	-4.0%	-15.9%	-71.1%

Seasonality of Cruise Passenger Arrivals



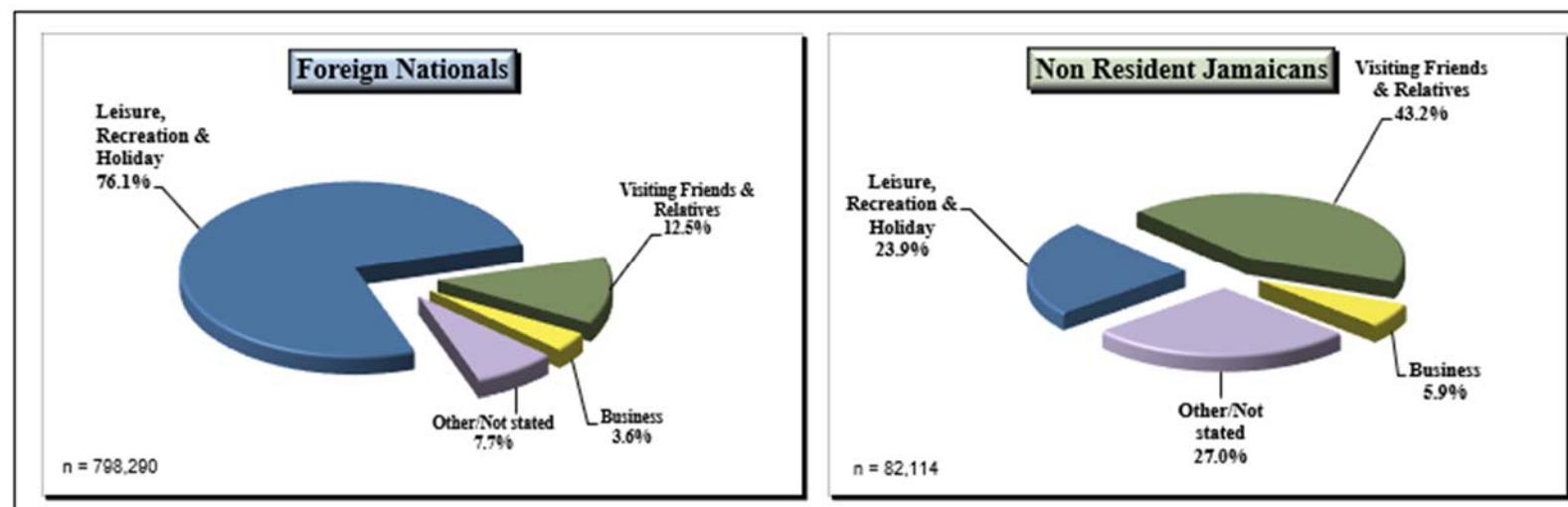
Cruise Passenger Arrivals by Port of Arrival



Stopover Arrivals by Purpose of Visit and Year of Arrival 2016 – 2020

	2016		2017		2018		2019		2020	
	No.	% Share	No.	% Share	No.	% Share	No.	% Share	No.	% Share
Leisure, Recreation and Holiday	1,599,129	73.3	1,780,512	75.7	1,867,662	75.5	2,015,291	75.2	627,196	71.2
Visiting Friends & Relatives	360,167	16.5	362,962	15.4	385,046	15.6	419,395	15.6	135,421	15.4
Business	98,424	4.5	92,066	3.9	91,648	3.7	93,964	3.5	33,506	3.8
Other/not stated	123,964	5.7	117,375	5.0	128,371	5.2	152,270	5.7	84,281	9.6
Total	2,181,684	100.0	2,352,915	100.0	2,472,727	100.0	2,680,920	100.0	880,404	100.0

Stopover Arrivals by Purpose of Visit and Type of Visitor



Stopover Arrivals by Purpose of Visit and Main Markets 2020

PURPOSE OF VISIT 2020	USA % Share		Canada % Share		UK/ Ireland % Share		Caribbean % Share	
Leisure, Recreation and Holiday	459,797	72.1	102,400	77.6	30,356	54.6	4,116	26.2
Visiting Friends & Relatives	94,919	14.9	17,780	13.5	15,801	28.4	4,307	27.5
Business	20,819	3.3	2,672	2.0	2,969	5.3	2,952	18.8
Other/not stated	61,970	9.7	9,162	6.9	6,469	11.6	4,310	27.5
Total	637,505	100.0	132,014	100.0	55,595	100.0	15,685	100.0

MARKET PERFORMANCE

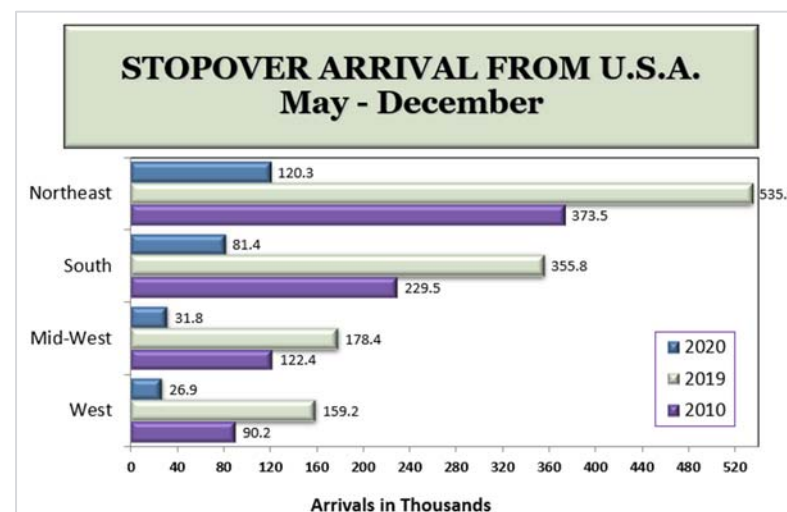
UNITED STATES

In 2020, there were approximately 9.84 million U.S. citizens who travelled overseas³. This shows a substantial decrease from the previous year's total of 44.8 million overseas travelers. Travel to the Caribbean region with 5.5 million arrivals declined by 64.9%ⁱ during this period.

Pertaining to Jamaica, during the winter period (Jan. – Apr.), stopover arrivals in 2020 were 38.2% lower than those in 2019 and 11.8% lower than in 2010. In comparison to the 2019 winter period, stopover arrivals from all market regions recorded decreases in arrivals; the Northeast fell by 37.3%, the South by 42.5%, the Midwest by 35.1% and the West 40.3%.

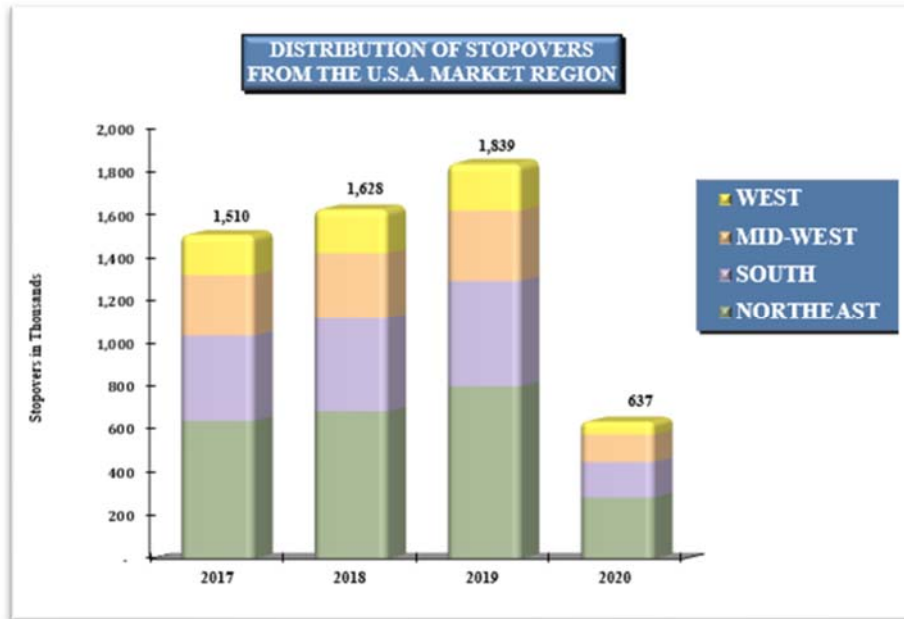
For the summer period (May – Dec.), the US market declined by 78.8% when compared to 2019 and fell by 68.1% over 2010. A total of 260,429 stopover arrivals came during summer. The deepest decline was recorded in the West region, with 26,942 arrivals down 83.1%, followed by the Midwest region with 31,843 arrivals down by 82.1%. The Northeast region recorded 120,283 arrivals down by 77.5% and the South region, with 81,361 arrivals, recorded a decrease of 77.1%.

The Northeastern and Southern regions contributed 70.1% of the US stopover visitors to Jamaica during 2020. This represents 0.3 percentage points less than its 70.3% contribution in 2019. The Midwest region contributed 20.2% of the stopover arrivals and the remaining 9.8% of the stopover visitors came from the Western region. The Northeast market region with 286,070 arrivals decreased by 64.2%, the South with 160,507 arrivals decreased by 67.5%, the Midwest with 128,693 fell by 60.7% and the Western region with 62,235 decreased by 71.5%. Overall, arrivals from the USA market decreased by 65.3% in 2020 with 1,201,399 below the 1,838,904 stopovers in 2019. This performance was 60.9% less arrivals than the 1,628,402 arrivals recorded in 2018 and 57.8% less than the 1,509,963 in 2017.

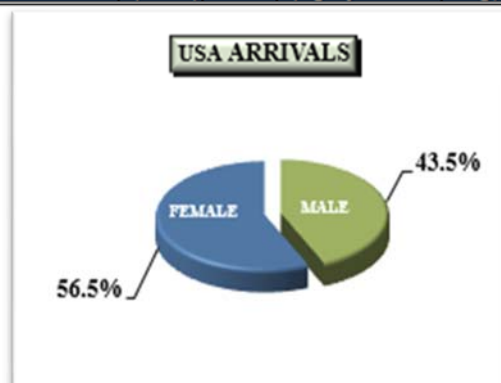


³ Source: USA National Travel and Tourism Office (NTTO)
Overview 2020

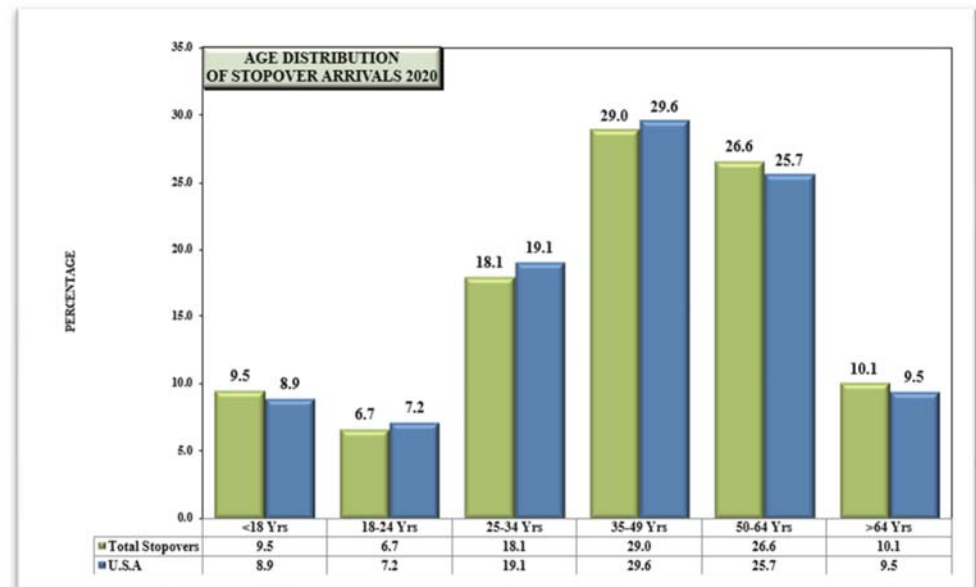
USA Visitor Summary

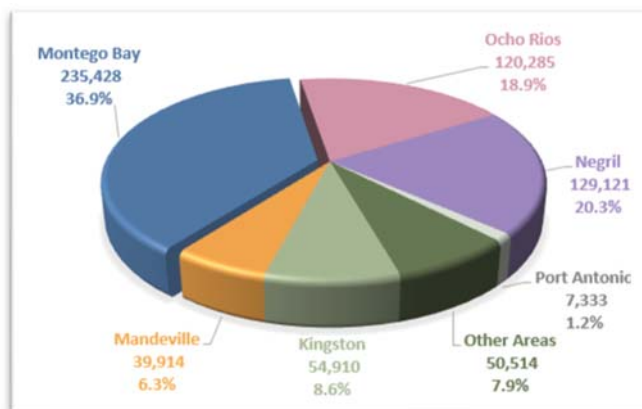


U.S.A. Regions	Stopovers in Thousands								%Change 2020/19
	2017	% Share	2018	% Share	2019	% Share	2020	% Share	
Northeast	638.7	42.3	683.0	41.9	799.5	43.5	286.1	44.9	-64.2
South	405.1	26.8	434.1	26.7	493.6	26.8	160.5	25.2	-67.5
Mid-West	286.7	19.0	305.9	18.8	327.6	17.8	128.7	20.2	-60.7
West	179.5	11.9	205.4	12.6	218.3	11.9	62.2	9.8	-71.5
Total	1,510.0	100.0	1,628.4	100.0	1,838.9	100.0	637.5	100.0	-65.3

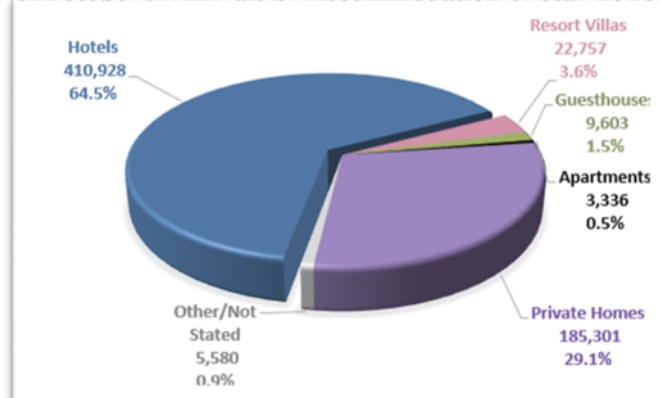


- The average length of stay for Foreign Nationals US visitors in 2020 was 7.9 nights, which is lower than the average of 9.4 nights for all visitors.
- In 2020 a total of 459,797 or 72.1% of US visitors came to Jamaica for leisure, recreation, and holiday, 94,919 or 14.9% came to visit friends & relatives, 20,819 or 3.3% on business and 61,970 or 9.7% for other or unstated purposes.
- The annual average growth rate for visitors from the USA over the past five years from 2016 to 2020 was a negative 17.9%.
- In 2020 the age distribution of US stopover visitors showed that 8.9% were aged less than 18 years, 7.2% were between 18 and 24 years, 48.8% were between 25 and 49 years, 25.7% were between 50 and 64 years and 9.5% were over 64 years.
- The Gender mix of visitors from USA, were 277,165 males (43.5%) and 360,340 females (56.5%). The gender ratio of visitors from the USA is 130 females per 100 males.





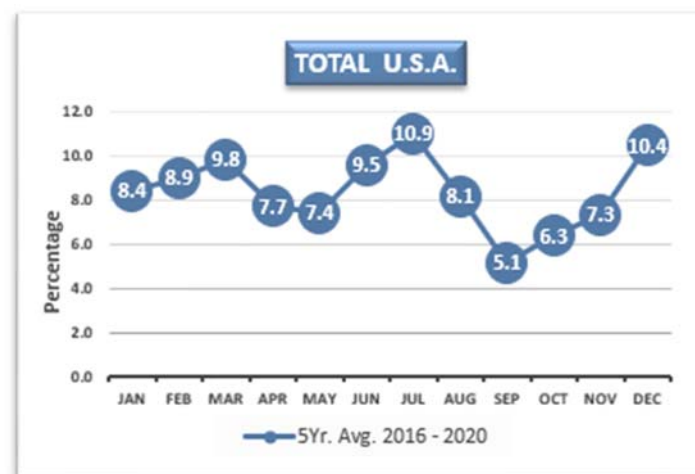
U.S.A Stopover Arrivals by Accommodation of Stay 2020



→ The most popular resort region to which US stopover visitors stayed in 2020 was Montego Bay with 235,428 or 36.9% of US visitors. 20.3% or 129,121 stayed in Negril and 18.9% or 120,285 of the US visitors stayed in Ocho Rios.

→ The accommodation of choice which US stopover visitors stayed during 2020 was Hotels with 410,928 or 64.5%, Other similar establishments accounted for 90,534 visitors or 5.6%, those staying in private residences accounted for 185,301 visitors or 29.1% of the US visitors.

→ The peak periods of US stopover visitors to Jamaica were during the summer months (June – July), Easter (March–April) and Christmas (December). The months with the highest numbers of stopover arrivals in 2020, in descending order, were: July, December, March, and June. This pattern has been holding strong for the past five years (2016 – 2020).



Total Stopover Arrivals from the U.S.A by Accommodation of stay and Resort Areas 2020

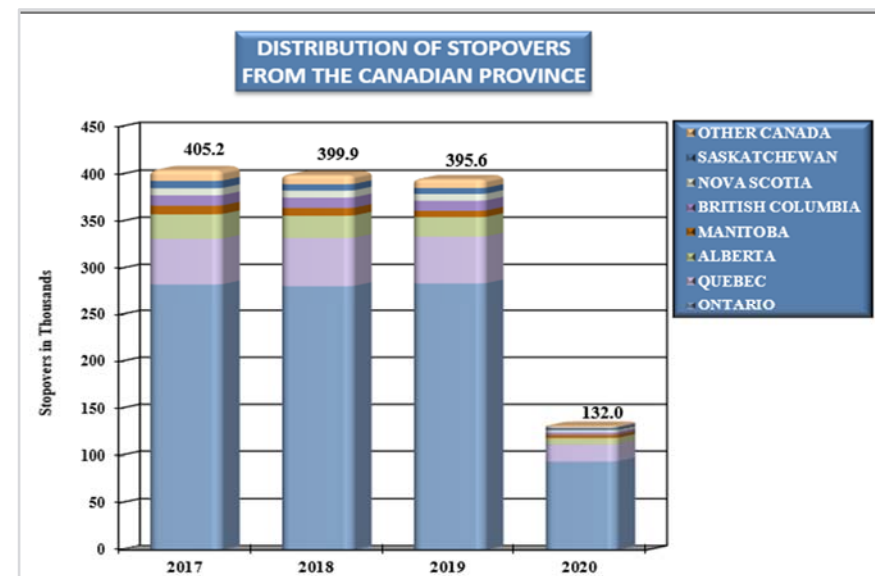
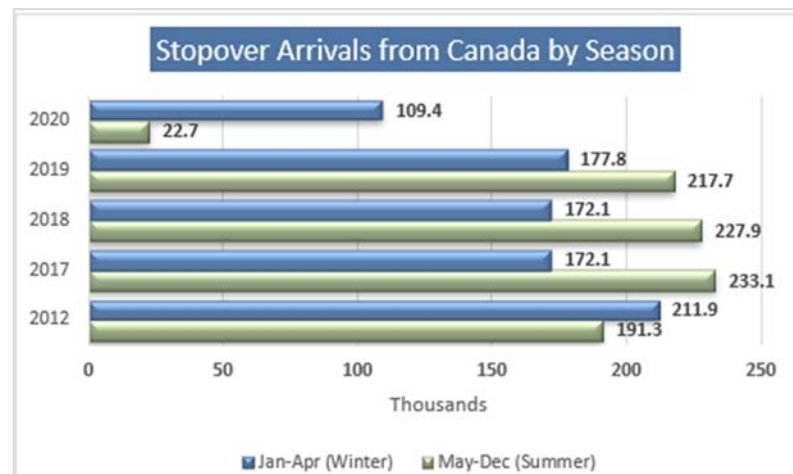
ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	9,333	10,092	194,330	86,460	110,240	374	99	410,928	64.5%	5.6
Resort Villas	2	1,490	11,569	5,552	3,358	755	31	22,757	3.6%	7.6
Guesthouses	919	909	2,306	1,265	3,674	294	236	9,603	1.5%	9.2
Apartments	101	-	1,041	1,839	355	-	-	3,336	0.5%	10.1
Private Homes	43,556	26,600	24,419	24,118	10,913	5,697	49,998	185,301	29.1%	17.0
Other/Not Stated	999	823	1,763	1,051	581	213	150	5,580	0.9%	10.2
Total	54,910	39,914	235,428	120,285	129,121	7,333	50,514	637,505	100.0%	9.1
% Share	8.6%	6.3%	36.9%	18.9%	20.3%	1.2%	7.9%	100.0%		
Average Length of Stay	13.2	22.7	6.5	23.7	7.6	17.1	16.6	9.1		

CANADA

Outbound overseas trips reached an estimated 2.609 million in 2020⁴, which was a 75.7% decrease over the 10.728 million in 2019. Stopover arrivals visiting Jamaica from Canada in 2020 totaled 132,014 representing 263,547 fewer Canadian visitors to Jamaica than in 2019, a 66.6% decrease.

The Canadian market during the (January – April), winter period, fell by 38.5% in 2020. A total of 109,355 stopovers came from that market compared to 177,846 in same period in 2019. This is 102,570 stopovers below the record number of 211,925 that came in the winter of 2012.

During the summer period (May – December), with a total of 22,659 stopovers arrivals, compared to the 217,715 arrivals in summer of 2019. This is 210,438 stopovers below the record number of 233,097 that came in the summer of 2017.



The main province of Ontario

contributed 94,376 or 71.5% to the Canadian stopover arrival total, which was a decrease of 0.4 percentage points over the 284,397 who came from that province in 2019. Quebec, the second leading visitor producing province, (with 13.4% of the visitors), produced 65.1% less stopovers. The other two leading provinces, Alberta declined by 66.1%, and Manitoba declined by 51.8% in 2020 compared to 2019

Canada Visitor Summary

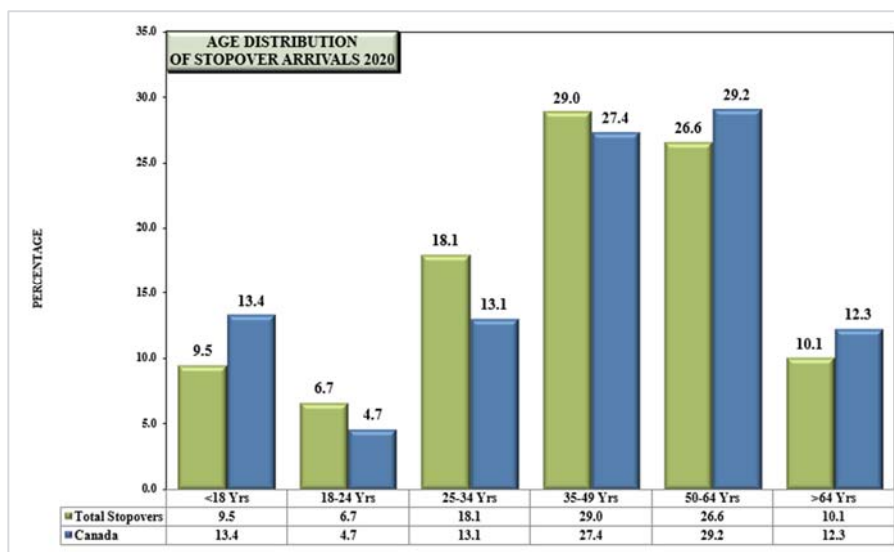
→ The average length of stay for Foreign National Canadian visitors in 2020 was 11.0 nights.

→ In 2020 a total of 102,400 or 77.6% of Canadian visitors came to Jamaica for leisure, recreation, and holidays 17,780 or 13.5% came to visit friends & relatives, 2,672 or 2.0% came on business, and 9,162 or 6.9% came for other or unstated purposes.

→ The annual average growth rate for visitors from the Canadian region over the past five year, from 2016 to 2020 was a negative 22.8%

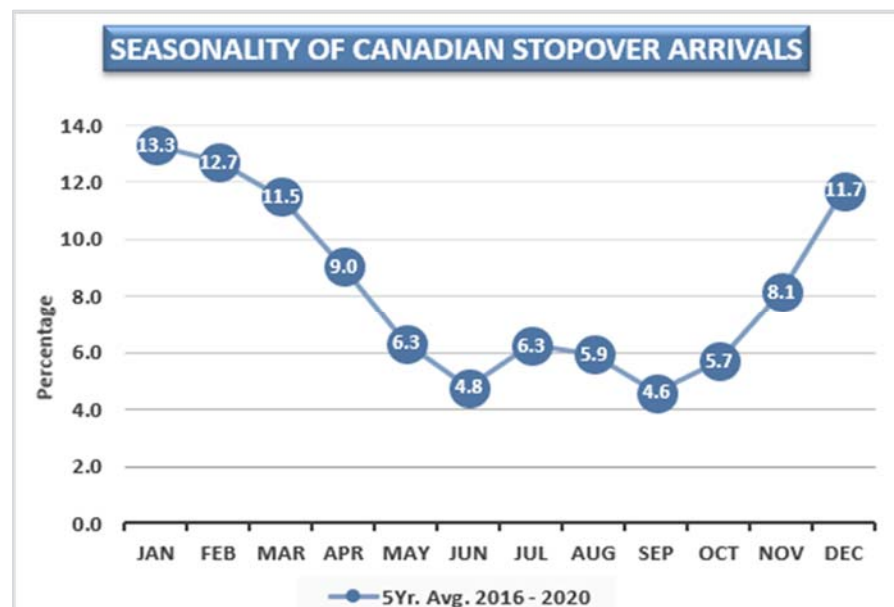
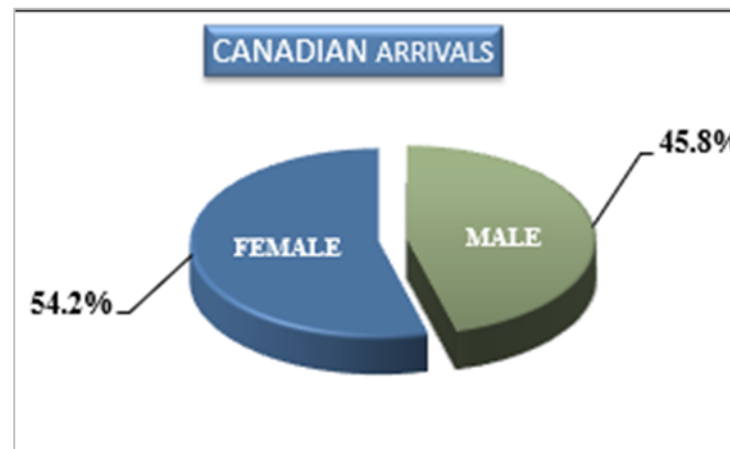
Provinces	Stopovers in Thousands								%Change 2020/19
	2017	%Share	2018	%Share	2019	%Share	2020	%Share	
ONTARIO	283.3	69.9	281.6	70.4	284.4	71.9	94.4	71.5	-66.8
QUEBEC	48.5	12.0	51.2	12.8	49.7	12.6	17.3	13.1	-65.1
ALBERTA	26.1	6.4	23.6	5.9	20.7	5.2	7.0	5.3	-66.1
MANITOBA	9.2	2.3	8.2	2.0	6.8	1.7	3.3	2.5	-51.8
BRITISH COLUMBIA	11.0	2.7	11.1	2.8	10.7	2.7	2.8	2.1	-74.0
SASKATCHEWAN	7.8	1.9	6.9	1.7	6.4	1.6	2.7	2.0	-58.1
NOVA SCOTIA	7.5	1.9	7.3	1.8	7.1	1.8	2.2	1.7	-69.2
OTHER CANADA	11.8	2.9	10.1	2.5	9.8	2.5	2.4	1.8	-75.8
Total	405.2	100.0	400.0	100.0	395.6	100.0	132.0	100.0	-66.6

⁴ Source: Statistics Canada
Overview 2020



→ In 2020 the age distribution shows 13.4% were aged under 18 years, 4.7% were between 18 – 24 years, 40.5% were between 25 – 49 years, 29.2% were between 50 – 64 years and 12.3% were 65 and over.

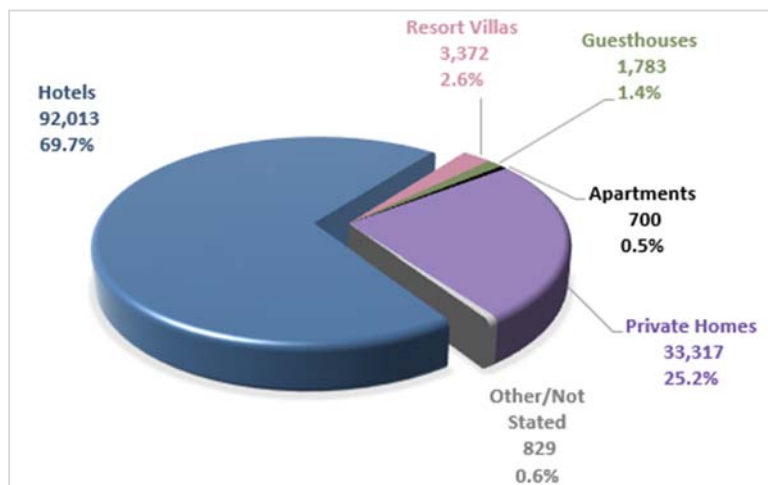
→ The Gender mix of visitors from Canada, were 60,385 males (45.8%) and 71,378 females (54.2%). The gender ratio of visitors from Canada is 118 females per 100 males.



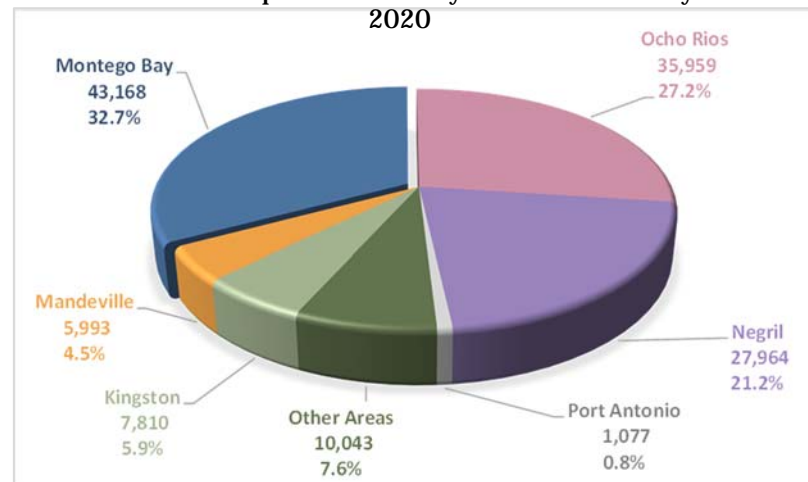
→ Traditionally, January through March and December are the peak months for visitor arrivals from Canada. This coincides with the cold winter climate experienced in Canada during this period.

- The most popular resort regions to which Canadian visitors stayed in 2020 was Montego Bay with a total of 43,168 or 20.0% of Canadian visitors, 16.7% or 35,959 Canadian visitors stayed in Ocho Rios and another 13.0% or 27,964 stayed in Negril.
- The accommodation of choice which Canadian stopover visitors stayed during 2020 was Hotels with 92,013 or 69.7%, Other similar establishments accounted for 13,012 visitors or 3.3%, those staying in private residences accounted for 5,867 visitors or 4.4% of the Canadian visitors.

Canadian Stopover Arrivals by Resort Area of Stay 2020



Canadian Stopover Arrivals by Resort Area of Stay 2020



Total Stopover Arrivals from Canada by Accommodation of stay and Resort Areas 2020

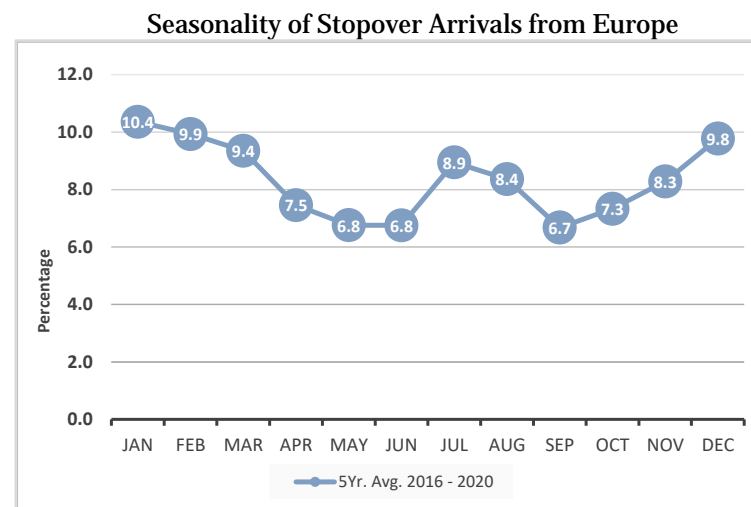
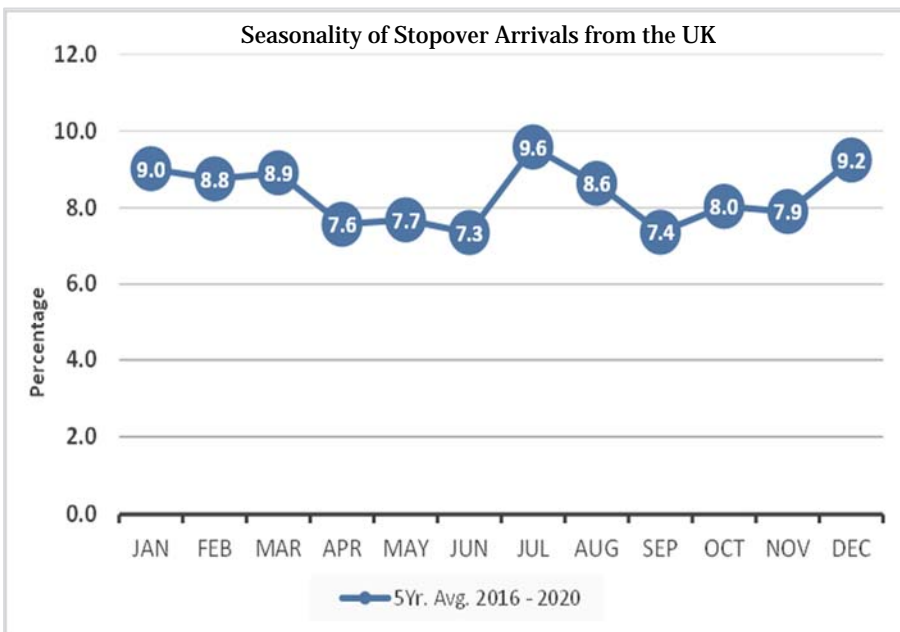
ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	1,160	829	36,612	29,897	23,437	48	30	92,013	69.7%	7.1
Resort Villas	-	245	1,429	851	746	100	1	3,372	2.6%	11.9
Guesthouses	186	162	315	153	895	34	38	1,783	1.4%	14.4
Apartments	4	-	203	358	135	-	-	700	0.5%	16.1
Private Homes	6,270	4,681	4,417	4,560	2,553	870	9,966	33,317	25.2%	27.2
Other/Not Stated	190	76	192	140	198	25	8	829	0.6%	16.5
Total	7,810	5,993	43,168	35,959	27,964	1,077	10,043	132,014	100.0%	12.5
% Share	5.9%	4.5%	32.7%	27.2%	21.2%	0.8%	7.6%	100.0%		
Average Length of Stay	20.0	25.9	9.1	9.9	10.5	28.3	26.4	12.5		

UNITED KINGDOM/EUROPE

The number of visits abroad by UK residents declined by 66% in YTD (Jan-Jun 2020)⁵ from 43.9 million down to 14.4 million.

Stopover arrivals to Jamaica out of the European region recorded negative growth in 2020. Arrivals from Europe decreased by 75.6% in 2020, moving down from 320,640 arrivals in 2019 to 78,225 arrivals in 2020. 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 55,595 stopover arrivals, registered a decline of 75.3% over the 225,037 recorded in 2019. The performance for winter period (Jan.-Apr.) fell by 43.4%. This trend continued during the summer with slightly higher levels of decreases to end the season with a decrease of 90.2% compared to 2019.

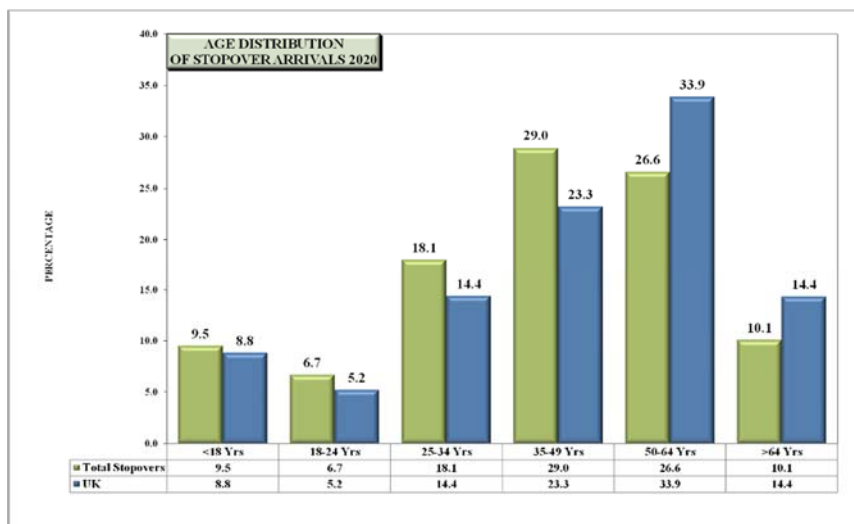
→ Traditionally, July, August and December are the peak months for visitor arrivals from UK with July being the highest month for visitors.

→ The average length of stay for Foreign National UK visitors in 2020 was 17.9 nights, which is higher than the average of 9.4 nights for all visitors.

→ In 2020 a total of 30,356 or 54.6% of UK visitors visited Jamaica for leisure, recreation and holiday, 15,801 or 28.4% visited friends & relatives, 2,969 or 5.3% came on business, and 6,469 or 11.6% visited for other or unstated purposes.

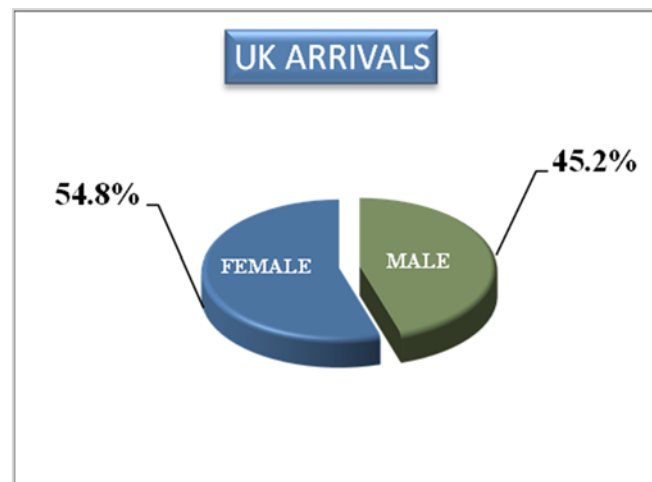
→ The annual average growth rate for visitors from the United Kingdom over the past five years from 2016 to 2020 was negative 28%.

⁵ Source: Office for National Statistics - Overseas travel and tourism Overview 2020



→ In 2020 the age distribution shows 8.8% were aged under 18 years, 5.2% were between 18 – 24 years, 37.7% were between 25 – 49 years, 33.9% were between 50 – 64 years and 14.0% were 65 and over.

→ The Gender mix of visitors from UK, were 25,107 males (45.2%) and 30,488 females (54.8%). The gender ratio of visitors from the United Kingdom is 121 females per 100 males.



→ The most popular resort regions to which UK visitors stayed in 2020 was Montego Bay with a total of 13,504 or 24.3% of UK visitors, 23.1% or 12,825 UK visitors stayed in Ocho Rios and another 15.6% or 8,672 stayed in Negril

Total Stopover Arrivals from The United Kingdom by Accommodation of stay and Resort Areas 2020

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	1,771	367	10,336	8,771	7,211	51	6	28,513	51.5%	10.3
Resort Villas	-	137	377	323	82	116	2	1,037	1.9%	16.0
Guesthouses	179	82	123	137	150	30	33	734	1.3%	17.6
Apartments	13	-	64	176	17	-	-	270	0.5%	21.5
Private Homes	4,527	4,310	2,432	3,310	1,117	965	7,828	24,489	44.2%	31.7
Other/Not Stated	76	37	82	72	41	20	6	334	0.6%	19.0
Total	6,566	4,933	13,414	12,789	8,618	1,182	7,875	55,377	100.0%	20.1
% Share	11.9%	8.9%	24.2%	23.1%	15.6%	2.1%	14.2%	100.0%		
Average Length of Stay	22.4	29.7	14.2	18.0	14.6	30.9	23.6	20.1		

Europe

Countries	Stopovers in Thousands								%Change 2020/19
	2017	%Share	2018	%Share	2019	%Share	2020	%Share	
United Kingdom	217.6	66.8	215.6	65.7	225.0	70.2	55.6	71.1	-75.3
Germany	29.9	9.2	34.3	10.4	24.1	7.5	5.5	7.0	-77.2
Italy	13.7	4.2	13.7	4.2	13.5	4.2	2.8	3.6	-79.4
France	7.4	2.3	9.0	2.7	8.3	2.6	2.8	3.5	-66.6
Netherlands	8.2	2.5	9.0	2.7	7.3	2.3	1.9	2.5	-73.7
Sweden	7.7	2.4	5.0	1.5	3.9	1.2	1.8	2.2	-55.3
Belgium	6.5	2.0	6.3	1.9	5.1	1.6	1.0	1.3	-80.7
Spain	7.7	2.4	6.7	2.0	5.0	1.6	0.9	1.2	-81.6
Switzerland	4.1	1.2	3.8	1.1	3.4	1.1	0.9	1.2	-73.1
Austria	2.6	0.8	2.9	0.9	2.3	0.7	0.8	1.0	-66.5
Russia	1.0	0.3	3.2	1.0	6.4	2.0	0.7	0.9	-88.6
Other Europe	19.4	6.0	19.0	5.8	16.2	5.1	3.6	4.6	-77.9
Total	325.8	100.0	328.4	100.0	320.6	100.0	78.2	100.0	-75.6

Germany continues to be the leading visitor producing country from Continental Europe. With a total of 5,504 stopover arrivals in 2020, the German market declined by a notable 77.2% over the 24,128 recorded in 2019. This is well below the peak of 43,018 German visitors recorded in 1998.

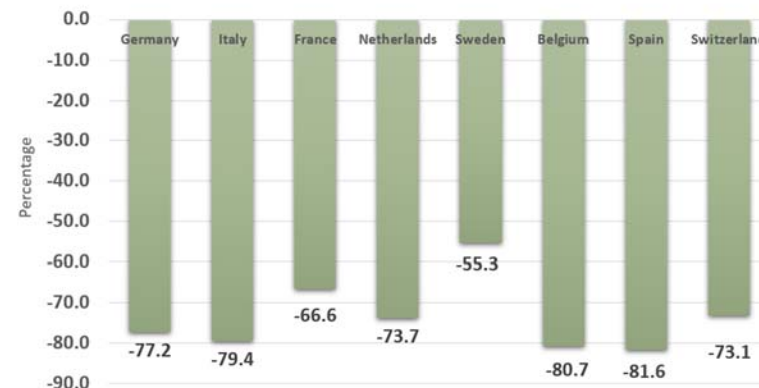
During 2020 Italy was the second main visitor producing country from Continental Europe with 2,788 arrivals, which was a decline of 78.2%, this is still below the 29,187 Italian arrivals recorded in 1992.

Northern Europe as a group (United Kingdom, Denmark, Finland, Ireland, Norway, and Sweden) represents 98 per cent of the total European market.

The performances of the other European countries albeit small numbers recorded similar negative growth in 2020 compared to the corresponding period in 2019.

The average length of stay for Continental Europe as a group was 12.7 nights.

% Change in Stopover Arrivals from Selected European Countries 2020 / 2019



LATIN AMERICA

Latin America continues to be a market which holds much potential for Jamaica. Stopover arrivals out of the Latin American market region decreased by a 64.4%, moving up from 38,885 in 2019 to 13,827 in 2020 and 54.7% lower 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 2016 to 2020 was negative 16.0%.

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

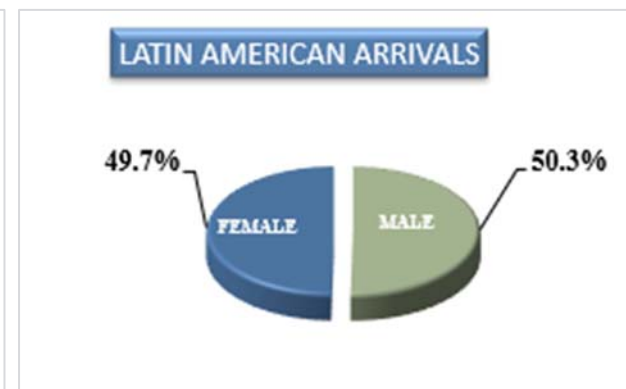
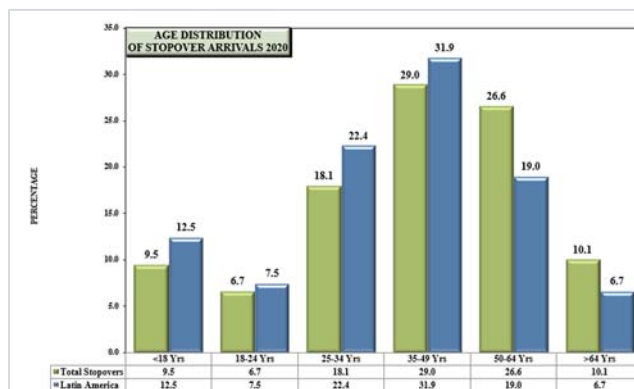
Of the top three visitor-producing countries in the South American sub-region, Argentina with 3,785 visitors declined by 45.4%; Chile with 2,537 visitors fell by 52.7%, and Peru with 1,859 declined by 48.7%.

From the Central American sub-region, Mexico with 1,103 visitors declined by 73.5%; Panama with 640 declined by 74.4%; and Costa Rica with 315 declined by 77.1%.

In 2020 the age distribution shows 12.5% were aged under 18 years, 7.5% were between 18 – 24 years, 54.3% were between 25 – 49 years, 19.0% were between 50 – 64 years and 6.7% were 65 and over.

The Gender mix of visitors from Latin America, were 6,958 males (50.3%) and 6,869 females (49.7%). The gender ratio of visitors from Latin America is 99 females per 100 males.

Seasonality of Stopover Arrivals from Latin America



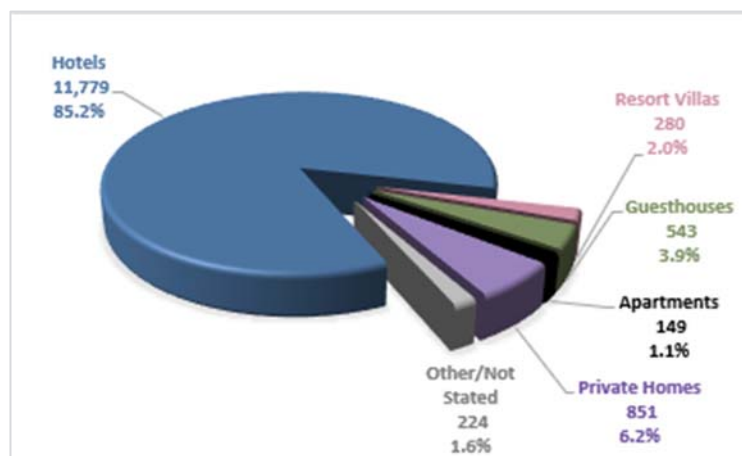
The most popular resort regions to which Latin American visitors stayed in 2020 was Montego Bay with a total of 6,519 or 47.1% of visitors from Latin America, 20.0% or 2,762 Latin American visitors stayed in Negril and another 16.9% or 2,333 stayed in Ocho Rios.

The average length of stay for Latin America as a group was 9.6 nights.

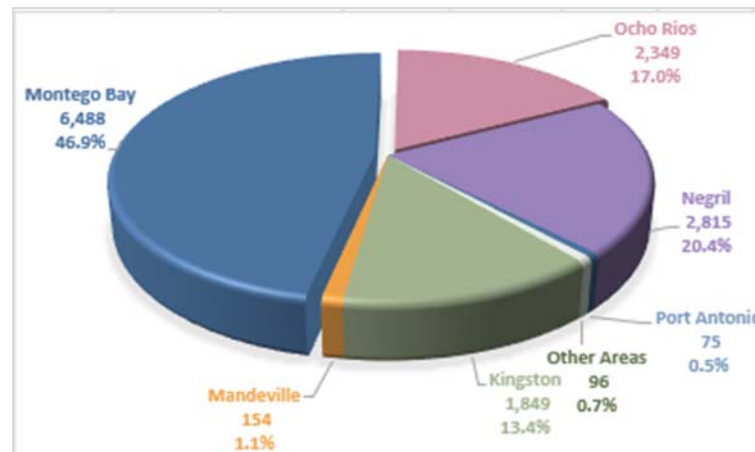
LATIN AMERICA

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	1,206	104	5,735	2,143	2,576	14	1	11,779	85.2%	7.8
Resort Villas	-	3	163	62	33	19	-	280	2.0%	12.2
Guesthouses	140	8	248	23	103	20	1	543	3.9%	13.7
Apartments	4	-	106	38	1	-	-	149	1.1%	11.9
Private Homes	424	38	153	65	68	12	91	851	6.2%	25.1
Other/Not Stated	75	1	83	18	34	10	3	224	1.6%	28.5
Total	1,849	154	6,488	2,349	2,815	75	96	13,826	100.0%	9.6
% Share	13.4%	1.1%	46.9%	17.0%	20.4%	0.5%	0.7%	100.0%		
Average Length of Stay	10.3	12.9	8.7	9.2	10.9	11.7	24.6	9.6		

Latam Stopover Arrivals by Resort Area of Stay 2020



Latam Stopover Arrivals by Accommodation of Stay 2020



CARIBBEAN

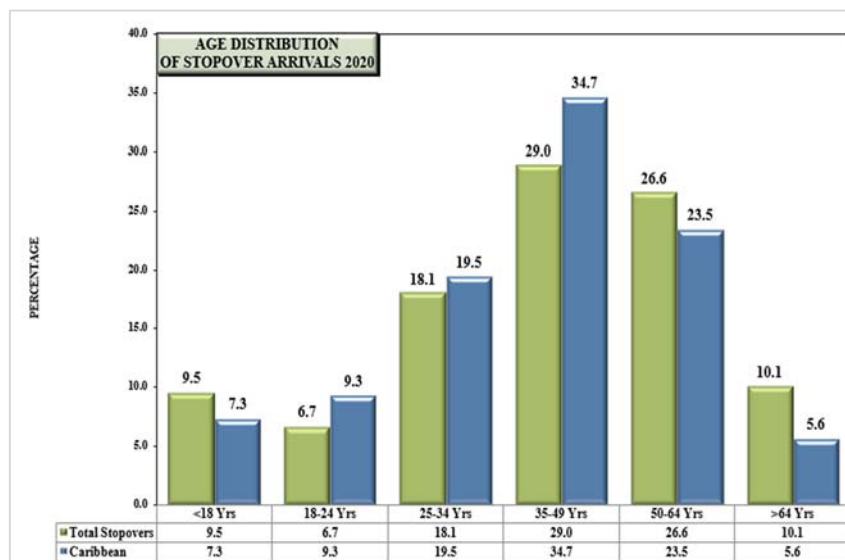
Arrivals from Caribbean territories to Jamaica decreased in 2020, Jamaica welcomed 15,685 arrivals from this market, which is 51,546 less arrivals than the peak of 67,231 Caribbean nationals who visited Jamaica in 2008, and it is a 78.2% decrease over the 71816 who visited in 2019.

The annual average growth rate for visitors from the Caribbean over the past five years from 2016 to 2020 was negative 30.1%.

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

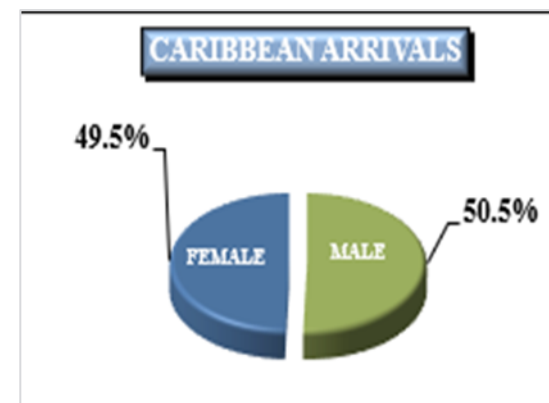
The Cayman Islands, with 4,195 stopovers, Trinidad & Tobago with 2,027, The Bahamas with 1,497, Turks & Caicos Is. with 1,121 and, Barbados with 968 arrivals continue to be the main providers of visitors to Jamaica from the Caribbean. These countries combined contributed 9,808 stopovers or 62.5% of the total Caribbean arrivals

Seasonality of Stopover Arrivals from the Caribbean



In 2020 the age distribution shows 7.3% were aged under 18 years, 9.3% were between 18 – 24 years, 54.2% were between 25 – 49 years, 23.5% were between 50 – 64 years and 5.6% were 65 and over

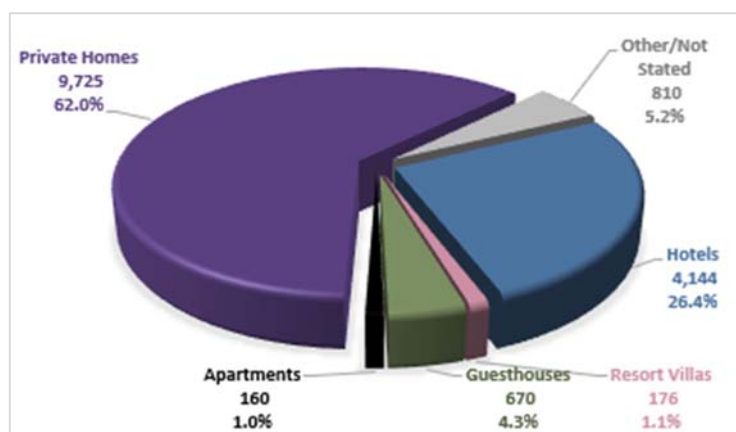
The Gender mix of visitors from the Caribbean, were 7,758 females (49.5%) and 7,927 males (50.5%). The gender ratio of visitors from the Caribbean is 98 females per 100 males.



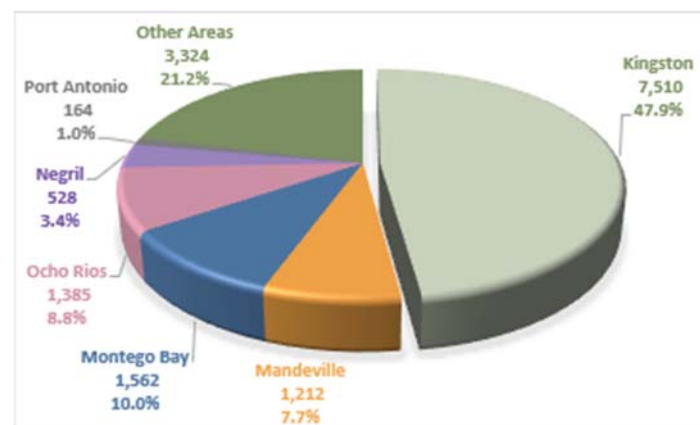
The most popular resort regions to which Caribbean visitors stayed in 2020 was Kingston with a total of 7,510 or 48.9% of visitors from the Caribbean, 10.2% or 1,562 Caribbean visitors stayed in Montego Bay and another 9.0% or 1,385 stayed in Ocho Rios.

CARIBBEAN										
ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Negril	Port Antonio	Other Areas	Total	% Share	Average Length of Stay
Hotels	2,885	52	603	399	185	6	12	4,144	26.4%	5.2
Resort Villas	-	7	67	77	15	10	-	176	1.1%	7.3
Guesthouses	568	17	27	26	14	5	12	670	4.3%	54.1
Apartments	66	-	69	24	-	-	-	160	1.0%	15.4
Private Homes	3,302	1,101	754	831	301	139	3,297	9,725	62.0%	21.3
Other/Not Stated	689	34	41	27	12	4	2	810	5.2%	84.6
Total	7,510	1,212	1,562	1,385	528	164	3,324	17,510	100.0%	21.8
% Share	47.9%	7.7%	10.0%	8.8%	3.4%	1.0%	21.2%			
Average Length of Stay	24.2	21.9	18.3	17.5	19.5	18.4	20.2	21.8		

Caribbean Stopover Arrivals by Accommodation Type 2020



Caribbean Stopover Arrivals by Resort Area of Stay 2020



OTHER COUNTRIES

Africa, Australia, Japan, and India are the main visitor producing countries from other parts of the World. When compared to 2019, Africa with 537 fell by 71.9%, Australia, with 484 stopovers fell by 76.9%, Japan with 406 fell by 76.3%, and India with 403 grew by 77.1%.

CRUISE PASSENGERS

Following the global pause in cruise operations in mid-March, cruises resumed sailing in parts of Europe, Asia and the South Pacific in July 2020. From early July through mid-December 2020, there were more than 200 sailings. At the end of 2020 5.7 million passengers cruised the globe which was an 80.5% decline from the 29.5 million that cruise in 2019.

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.

Fleet of the future.

- There's an app for that – with robust cruise line apps, cruisers are increasingly able to message each other onboard, make dining or spa reservations, and find step-by-step directions to their stateroom.
- More than a bracelet – wearable technology allows cruisers to unlock their stateroom, swipe and pay, and even order food and drinks to their lido lounge.
- Going with the flow – onboard venues feature integrated designs, allowing cruisers to flow from one venue to the next, creating lively, open, and engaged spaces for dining, socializing, or taking in a performance.
- Smart homes at sea – innovative solutions create new accommodation experiences, including virtual views in interior staterooms and al-fresco living in verandah staterooms. Virtual assistants, device casting, and custom smart-lighting bring further innovation to a cruiser's home away from home.
- On island time – private destinations become an extension of the ship, offering cruisers a seamless island getaway, featuring additional entertainment, elevated dining, and a mix of relaxed and thrilling experiences—all just steps from their stateroom.

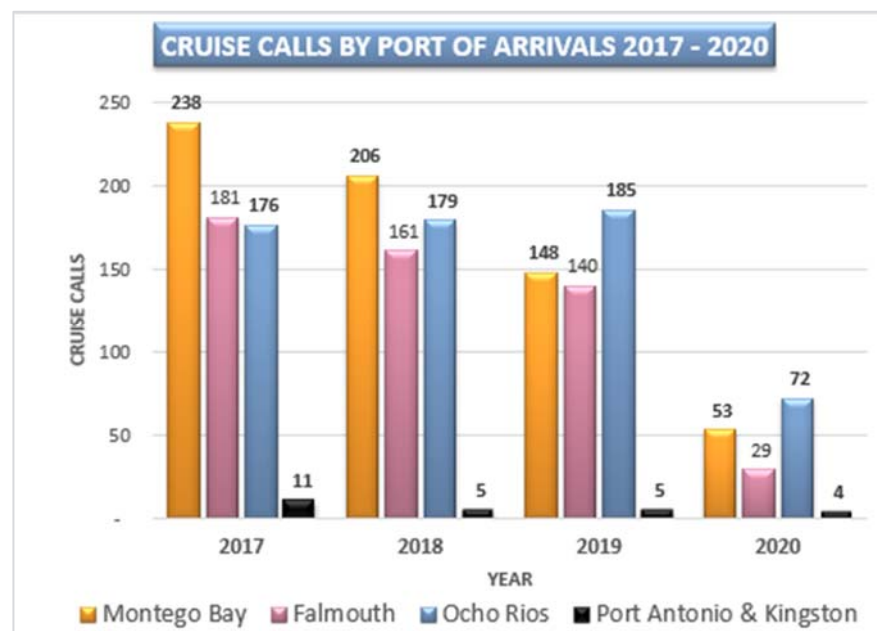
Today's cruise ships offer a world of innovations that align with cruise lines' brands from skydiving, go-karts and rollercoasters to celebrity chef, breathtaking spas and all-suite staterooms. While catering to everyone from multi-generational families to solo cruisers and offering all of them ways 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 regional destination, accounting for more than a half of (53.2%) of the entire global passenger volume market share. The passenger numbers for the Caribbean continues to be consistent and high, despite other rising cruise destinations.

For the two and a half months of operations in 2020. January – March, Jamaica recorded a decline in cruise passengers, 449,271 from 158 ship calls. This total of 449,271 cruise passengers, who visited our shores, was a 66.9% decrease over the 1,553,230 recorded for the corresponding period in 2019.

The port of Ocho Rios provided the largest share of Jamaica's cruise arrivals from 72 calls, accounting for 229,311 or 51.0% of the 449,271 who arrived at our shores in 2020. The port of Falmouth contributed 115,439 cruise ship passengers or 25.7% of total passengers to Jamaica from 29 cruise ship calls. The port of Montego Bay accounted for 100,248 passengers or 22.3%. During 2020 the port of Port Antonio received one cruise ship call with 64 passengers and the port of Port Royal received 3 cruise ship calls with and total of 4,209 passengers.

The cruise ships carrying the most passengers to Jamaica in 2020 were, Norwegian Breakaway, calling to the Port of Ocho Rios, Oasis of the Seas, calling to the Port of Falmouth, and Mein Schiff 1, calling to the Port of Ocho Rios. The Norwegian Breakaway made 8 calls with 35,246 passengers. The Oasis of the Seas made 5 calls with 31,248 passengers, and the Mein Schiff 1 made 10 cruise ship calls and provided 27,978 passengers. The combined total of 94,472 cruise passengers from these three ships represents 21.0% of Jamaica's total cruise passenger market.



CRUISE PASSENGERS TO JAMAICA BY MAJOR CRUISE LINES						
Cruise Lines	2015	2016	2017	2018	2019	2020
CARNIVAL CRUISE LINE & PLC	480,970	441,551	504,289	490,996	387,479	90,214
Aida Cruise	55,473	60,966	71,148	77,805	67,978	30,402
Costa Cruises	22,102	17,595	19,227	2,422	17,351	11,209
Holland America	23,511	17,309	17,524	26,000	55,350	13,083
Norwegian Cruises	129,880	120,363	109,618	196,839	85,793	58,269
P & O Cruises	10,362	19,632	11,711	7,775	3,595	1,751
Princess Cruises	24,078	35,475	47,546	67,279	89,669	28,943
TOTAL	746,376	712,891	781,063	869,116	707,215	233,871
ROYAL CARIBBEAN	610,131	579,853	605,933	477,642	378,219	60,356
Celebrity Cruises	51,260	56,162	64,878	12,316	2,024	-
TUI Cruises	-	18,716	50,966	27,011	56,172	13,994
TOTAL	661,391	654,731	721,777	516,969	436,415	74,350
DISCOVERY CRUISES				39,743	38,178	19,562
MSC CRUISES	36,741	129,671	204,070	240,214	237,377	67,764
DISNEY CRUISES	84,958	67,038	106,109	95,019	88,829	17,308
Other Cruise Lines	39,006	88,621	107,537	82,888	43,676	36,416
TOTAL	1,568,472	1,652,952	1,920,556	1,843,949	1,551,690	449,271

Average Length of Stay

In 2020 the overall average intended length of stay for foreign nationals was 9.4 nights, which was more than the 7.9 nights in 2019. This is because of the Covid-19 travel restrictions and compulsory quarantine regulations imposed on travel resumption in 2020. It is still 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 6.3 nights and those who stayed in non-hotel accommodation stayed 16.7 nights.

	FOREIGN NATIONAL ARRIVALS	Average Length of Stay (Nights)	NON-RESIDENT JAMAICAN ARRIVALS	Average Length of Stay (Nights)
Hotel	555,831	6.3	4,483	9.1
Non-Hotel	48,540	10.3	1,308	15.5
Private Homes	180,961	18.6	76,063	23.4
Other	12,958	14.8	260	21.1
	798,290	9.4	82,114	22.5

<u>FOREIGN NATIONAL ARRIVALS</u>					
	2016	2017	2018	2019	2020
U.S.A.	7.6	7.2	6.8	6.6	7.9
CANADA	9.0	8.6	8.6	8.7	11.0
U.K.	15.3	15.0	14.4	14.1	17.9
EUROPE	11.9	11.4	11.2	11.4	13.8
LATIN AMERICA	8.1	8.2	8.7	8.6	10.2
CARIBBEAN	9.1	10.7	12.1	12.1	22.1
OTHER COUNTRIES	17.3	15.9	16.0	14.2	19.4
TOTAL	8.8	8.4	8.1	7.9	9.4

The overall average intended length of stay for non-resident Jamaicans was 22.5 nights, which was more than the 16.8 nights in 2019. Those Jamaicans who used hotel accommodation had an average length of stay of 9.1 nights and those who stayed in non-hotel accommodation stayed 23.3 nights.

American visitors, on the average, stayed 7.9 nights while Canadians stayed an average of 11 nights. Visitors from the United Kingdom recorded an average length of stay of 17.9 nights and those visitors from Continental Europe stayed 12.7 nights. Visitor from Latin America stayed an average of 9.5 nights and those from the Caribbean stayed 23.2 nights. All these lengths of stays have been influenced by the Covid-19 protocols.

Hotel Room Occupancy

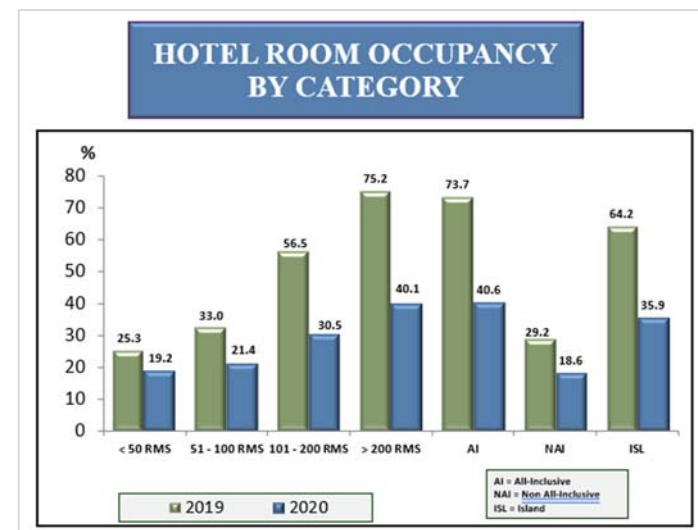
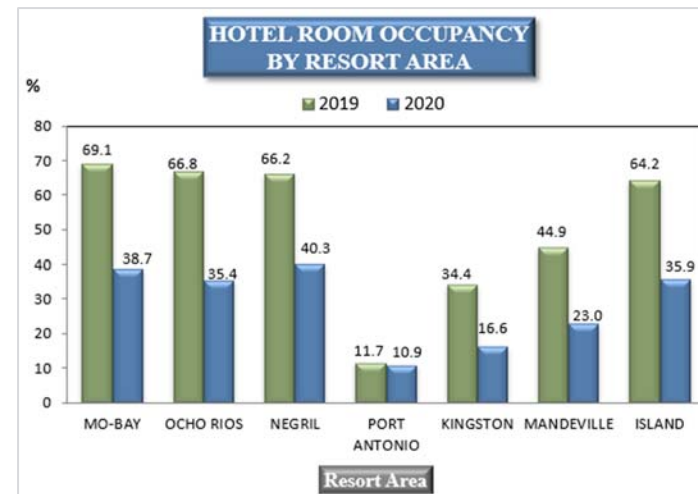
The average available room capacity fell by 35.7% in 2020, moving from 24,432 rooms in 2019 to 15,709 rooms in 2020. Total room nights sold of 2,061,221 in 2020 was down 64.0% below the 5,727,936 room nights sold in 2019. Hotel room occupancy decreased by 28.3 percentage points to 35.9%, compared to the 64.2% level in 2019. The number of stopovers that intended to stay in hotel accommodations decreased from 1,843,868 in 2019 to 560,314, a decrease of 69.6%.

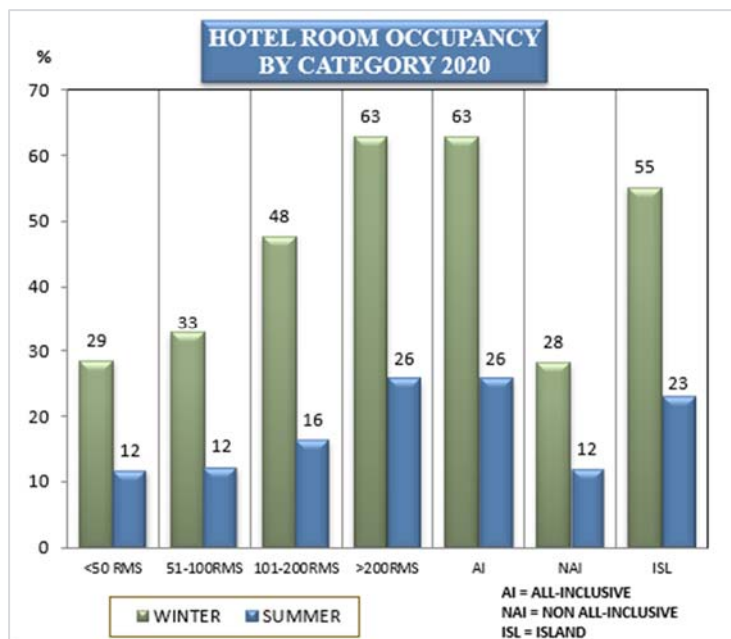
In the resort region of Montego Bay, the annual hotel room occupancy rate was 38.7%, compared to 69.1% recorded in 2019. The total number of room nights sold fell by 66.1% moving from 2,416,049 in 2019 to 819,673 in 2020. The average room capacity declined by 39.6% in 2020, moving from 9,578 rooms in 2019 to 5,782 rooms in 2020. The number of stopovers that intended to stay in Montego Bay at hotel accommodations declined from 833,689 in 2019 to 248,474, a decrease of 70.2% in 2019.

The average hotel room occupancy rate for Ocho Rios was 35.4% which was 30.4 percentage points lower than the 66.8% recorded in 2019. The total number of hotel room nights sold moved from 1,490,992 in 2019 down to 527,530 in 2020 a decrease of 64.6%. The number of stopovers that intended to stay in Ocho Rios at hotel accommodations recorded a decrease of 71.0%, moving from 451,465 in 2019 down to 131,147 in 2020.

The resort area of Negril recorded an average hotel room occupancy rate of 25.9% in comparison to the rate of 66.2% in 2019. The number of hotel room nights sold in this resort area fell by 60.2%, recording 594,402 room nights sold compared 1,492,919 sold in 2019. The average room capacity fell by 34.7% in 2020, moving from 6,177 rooms in 2019 to 4,031 rooms in 2020. The number of stopovers that intended to stay in Negril at hotel accommodations decreased from 451,014 in 2019 to 150,513, which was a decrease of 66.6% in 2020.

In the Mandeville/Southcoast resort area, average hotel room occupancy rate fell by 21.9 percentage points, moving from 44.9% in 2019 to 23.0% in 2020. The average room capacity decreased by 31.5% in 2020, moving from 752 rooms in 2019 to 515 rooms in 2020. Room nights sold fell from 123,135 in 2019 to 43,380 being sold in 2020.





101 – 200 rooms recorded an occupancy rate of 30.5%, and hotels with over 200 rooms achieved a room occupancy rate of 40.1%. The number of stopover arrivals that intended to stay in hotels with more than 100 rooms was 517,627 which was 69.7% lower than the 1,707,060 stopovers in 2019.

Kingston & St. Andrew achieved a hotel room occupancy level of 16.6%, compared to 34.4% recorded in 2019. The average room capacity decreased by 26.2% in 2020, moving from 1,537 rooms in 2019 to 1,134 rooms in 2020. The number of room nights sold in Kingston & St. Andrew decreased by 64.2%, moving from 192,961 in 2019 to 69,021 in 2020.

Hotel room occupancy for the resort area of Port Antonio was 10.9%, the number of room nights sold in Port Antonio fell from 11,880 in 2019 to 7,215 in 2020 and the average room capacity moved from 277 rooms in 2019 to 181 rooms in 2020.

Overall, the all-inclusive hotel room occupancy rate decreased to 40.6% which was 33.1 percentage points lower than the level of 73.7%, as recorded in 2019. Non all-inclusive room occupancy rate moved down from 29.2% in 2019 to 18.6% in 2020.

Hotel room occupancy rate varied with the size of the hotel. Hotels with less than 50 rooms, recorded a rate of 19.2%. Hotels with 51 – 100 rooms, achieved a rate of 21.4%. The number of stopovers that intended to stay in hotels with less than 100 rooms decreased from 136,808 in 2019 to 42,687, a decrease of 68.8% in 2020. Hotels in the size range of

HOTEL UTILIZATION

Average Room Capacity Available								% Change	% Share
Resort Area	2016	2017	2018	2019	2020	+/- 2020/19	2020/19	2020/19	2020
Montego Bay	7,576	8,961	9,277	9,578	5,782	(3,796)	-39.6%		36.8%
Ocho Rios	5,920	6,007	6,272	6,111	4,066	(2,045)	-33.5%		25.9%
Negril	5,026	5,360	5,965	6,177	4,031	(2,146)	-34.7%		25.7%
Port Antonio	145	184	178	277	181	(96)	-34.7%		1.2%
Kingston & St. Andrew	1,261	1,337	1,240	1,537	1,134	(403)	-26.2%		7.2%
Mandeville & Southcoast	614	704	683	752	515	(237)	-31.5%		3.3%
Jamaica	20,542	22,553	23,615	24,432	15,709	(8,723)	-35.7%		100.0%
Room Nights sold								% Change	% Share
Resort Area	2016	2017	2018	2019	2020	+/- 2020/19	2020/19	2020/19	2020
Montego Bay	1,851,573	2,233,331	2,334,538	2,416,049	819,673	(1,596,376)	-66.1%		39.8%
Ocho Rios	1,409,603	1,474,617	1,601,371	1,490,992	527,530	(963,462)	-64.6%		25.6%
Negril	1,164,881	1,217,383	1,425,188	1,492,919	594,402	(898,517)	-60.2%		28.8%
Port Antonio	6,948	9,055	10,546	11,880	7,215	(4,665)	-39.3%		0.4%
Kingston & St. Andrew	263,161	277,749	268,750	192,961	69,021	(123,940)	-64.2%		3.3%
Mandeville & Southcoast	122,446	132,200	135,338	123,135	43,380	(79,755)	-64.8%		2.1%
Jamaica	4,818,612	5,344,335	5,775,731	5,727,936	2,061,221	(3,666,715)	-64.0%		100.0%
Room Occupancy								% Change	% Change
Resort Area	2016	2017	2018	2019	2020	+/- 2020/19	2020/19	2020/19	2020/18
Montego Bay	66.8%	68.3%	68.9%	69.1%	38.7%	-30.4%	-44.0%		-43.8%
Ocho Rios	65.1%	67.3%	70.0%	66.8%	35.4%	-31.4%	-47.0%		-49.4%
Negril	63.3%	62.2%	65.5%	66.2%	40.3%	-25.9%	-39.1%		-38.4%
Port Antonio	13.1%	13.5%	16.2%	11.7%	10.9%	-0.8%	-7.2%		-32.8%
Kingston & St. Andrew	57.0%	56.9%	59.4%	34.4%	16.6%	-17.8%	-51.7%		-72.0%
Mandeville & Southcoast	54.5%	51.4%	54.3%	44.9%	23.0%	-21.9%	-48.7%		-57.6%
Jamaica	64.1%	64.9%	66.9%	64.2%	35.9%	-28.3%	-44.1%		-46.3%

TOURIST ACCOMMODATION INVENTORY								
Category [# Properties]	2016	2017	2018	2019	2020	+/- 2020/19	% Change 2020/19	% Share 2020
<= 50 rooms	109	116	113	123	86	(37)	-30.1%	54.8%
51 - 100	34	32	31	27	22	(5)	-18.5%	14.0%
101 - 200	15	16	15	14	10	(4)	-28.6%	6.4%
> 200 rooms	40	43	44	45	39	(6)	-13.3%	24.8%
All-Inclusive	72	77	74	76	57	(19)	-25.0%	36.3%
Non-All Inclusive	126	130	129	133	100	(33)	-24.8%	63.7%
All Hotels	198	207	203	209	157	(52)	-24.9%	22.5%
Guest Houses	522	532	510	510	170	(340)	-66.7%	24.4%
Resorts Villas	929	948	968	970	345	(625)	-64.4%	49.5%
Apartments	369	401	371	371	25	(346)	-93.3%	3.6%
Total Accommodation	2,018	2,088	2,052	2,060	697	(1,363)	-66.2%	100.0%
Category [# Rooms]	2016	2017	2018	2019	2020	+/- 2020/19	% Change 2020/19	% Share 2020
<= 50 rooms	2,745	2,908	2,857	3,379	2,327	(1,052)	-31.1%	11.4%
51 - 100	2,318	2,250	2,218	1,889	1,515	(374)	-19.8%	7.4%
101 - 200	2,079	2,242	2,147	1,949	1,339	(610)	-31.3%	6.5%
> 200 rooms	15,770	16,742	17,869	17,876	15,311	(2,565)	-14.3%	74.7%
All-Inclusive	17,834	18,738	19,933	19,510	16,204	(3,306)	-16.9%	79.1%
Non-All Inclusive	5,078	5,404	5,158	5,583	4,288	(1,295)	-23.2%	20.9%
All Hotels	22,912	24,142	25,091	25,093	20,492	(4,601)	-18.3%	81.3%
Guest Houses	3,737	3,829	3,726	3,730	1,998	(1,732)	-46.4%	7.9%
Resorts Villas	3,074	3,162	3,204	3,165	2,104	(1,061)	-33.5%	8.3%
Apartments	679	718	818	811	616	(195)	-24.0%	2.4%
Total Accommodation	30,402	31,851	32,839	32,799	25,210	(7,589)	-23.1%	100.0%

* Excluding closed properties

ACCOMMODATION STATISTICS

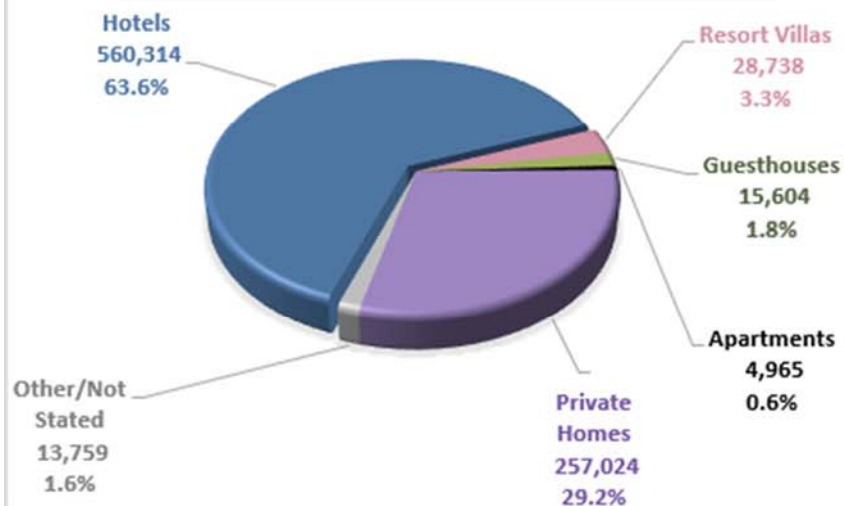
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Total Accommodation	30,402	31,851	32,839	32,799	25,210	(7,589)	-23.1%	100.0%

* Excluding closed properties

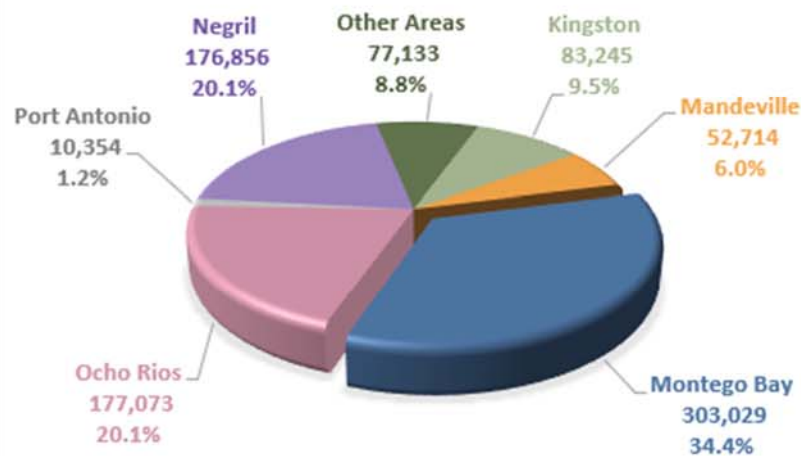
VISITORS TO JAMAICA BY TYPE OF ACCOMMODATION 2020

ACCOMMODATION	Kingston	Mandeville	Montego Bay	Ocho Rios	Port Antonio	Negril	Other Areas	Total	% Share	Average Length of Stay
Hotels	18,034	11,465	248,474	131,147	528	150,513	153	560,314	63.6%	6.3
Resort Villas	4	1,956	14,057	7,070	1,138	4,477	36	28,738	3.3%	8.8
Guesthouses	2,784	1,251	3,792	1,685	468	5,289	335	15,604	1.8%	12.8
Apartments	203	-	1,656	2,588	-	518	-	4,965	0.6%	12.1
Private Homes	59,922	36,988	32,681	33,208	7,887	15,115	71,223	257,024	29.2%	20.0
Other/Not Stated	2,298	1,054	2,369	1,375	333	944	5,386	13,759	1.6%	14.9
Total	83,245	52,714	303,029	177,073	10,354	176,856	77,133	880,404	100.0%	10.7
% Share	9.5%	6.0%	34.4%	20.1%	1.2%	20.1%	8.8%	100.0%		
Average Length of Stay	15.8	17.8	7.5	9.5	20.0	8.6	18.7	10.7		

VISITORS BY TYPE OF ACCOMMODATION



VISITORS BY RESORT REGION



Airlift Statistics

TOTAL AIR CAPACITY, PASSENGERS AND LOAD FACTORS													
Capacity Available (Seats)	2017	2018	2019	2020	+ / -	% Change 2020/19	Passengers Carried	2017	2018	2019	2020	+ / -	% Change 2020/19
January	318,190	325,397	350,124	375,386	25,262	7.2%	January	238,827	251,975	274,699	281,680	6,981	2.5%
February	279,218	296,581	320,192	336,319	16,127	5.0%	February	217,466	228,466	258,327	264,191	5,864	2.3%
March	318,007	337,915	377,975	250,303	(127,672)	-33.8%	March	248,679	272,716	312,730	137,945	(174,785)	-55.9%
Q1	915,415	959,893	1,048,291	962,008	(86,283)	-8.2%	Q1	704,972	753,157	845,756	683,816	(161,940)	-19.1%
April	302,985	309,627	324,096	-	(324,096)	-100.0%	April	250,713	246,043	274,281	-	(274,281)	-
May	267,804	291,663	291,696	-	(291,696)	-100.0%	May	213,707	231,118	244,561	-	(244,561)	-
June	288,533	309,220	309,041	21,379	(287,662)	-93.1%	June	245,423	262,677	274,427	12,787	(261,640)	-95.3%
Q2	859,322	910,510	924,833	21,379	(903,454)	-97.7%	Q2	709,843	739,838	793,269	12,787	(780,482)	-98.4%
July	327,834	344,040	350,827	109,916	(240,911)	-68.7%	July	290,867	299,202	313,345	51,947	(261,398)	-83.4%
August	304,248	323,392	335,344	107,616	(227,728)	-67.9%	August	269,042	284,540	295,000	54,354	(240,646)	-81.6%
September	215,819	242,039	242,246	92,512	(149,734)	-61.8%	September	183,175	186,863	201,235	37,401	(163,834)	-81.4%
Q3	847,901	909,471	928,417	310,044	(618,373)	-66.6%	Q3	743,084	770,605	809,580	143,702	(665,878)	-82.2%
October	235,054	260,879	259,343	111,261	(148,082)	-57.1%	October	199,543	206,681	220,654	58,197	(162,457)	-73.6%
November	276,452	289,417	292,678	114,441	(178,237)	-60.9%	November	229,016	244,645	245,721	65,180	(180,541)	-73.5%
December	343,753	351,866	383,832	166,391	(217,441)	-56.7%	December	304,843	319,085	342,139	106,933	(235,206)	-68.7%
Q4	855,259	902,162	935,853	392,093	(543,760)	-58.1%	Q34	733,402	770,411	808,514	230,310	(578,204)	-71.5%
Year	3,477,897	3,682,036	3,837,394	1,685,524	(2,151,870)	-56.1%	Year	2,891,301	3,034,011	3,257,119	1,070,615	(2,186,504)	-67.1%
Load Factor (% of seats filled)	2017	2017	2019	2020	+ / -	% Change 2020/19							
January	75.1%	77.4%	78.5%	75.0%	-3.4%	-4.4%							
February	77.9%	77.0%	80.7%	78.6%	-2.1%	-2.6%							
March	78.2%	80.7%	82.7%	55.1%	-27.6%	-33.4%							
Q1	77.0%	78.5%	80.7%	71.1%	-9.6%	-11.9%							
April	82.7%	79.5%	84.6%	-	-84.6%	-							
May	79.8%	79.2%	83.8%	-	-83.8%	-							
June	85.1%	84.9%	88.8%	59.8%	-29.0%	-32.6%							
Q2	82.6%	81.3%	85.8%	59.8%	-26.0%	-30.3%							
July	88.7%	87.0%	89.3%	47.3%	-42.1%	-47.1%							
August	88.4%	88.0%	88.0%	50.5%	-37.5%	-42.6%							
September	84.9%	77.2%	83.1%	40.4%	-42.6%	-51.3%							
Q3	87.6%	84.7%	87.2%	46.3%	-40.9%	-46.8%							
October	84.9%	79.2%	85.1%	52.3%	-32.8%	-38.5%							
November	82.8%	84.5%	84.0%	57.0%	-27.0%	-32.2%							
December	88.7%	90.7%	89.1%	64.3%	-24.9%	-27.9%							
Q4	85.8%	85.4%	86.4%	58.7%	-27.7%	-32.0%							
Year	83.1%	82.4%	84.9%	63.5%	-21.4%	-25.2%							

Overview 2020

Research & Market Intelligence Unit – Jamaica Tourist Board

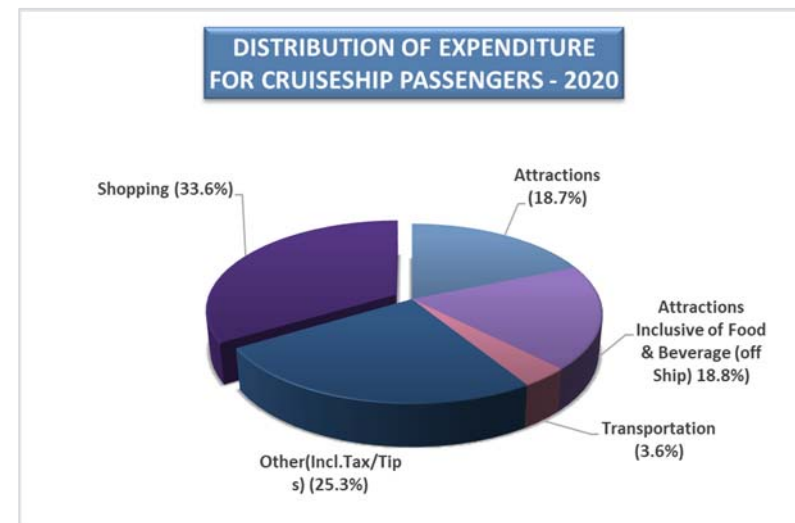
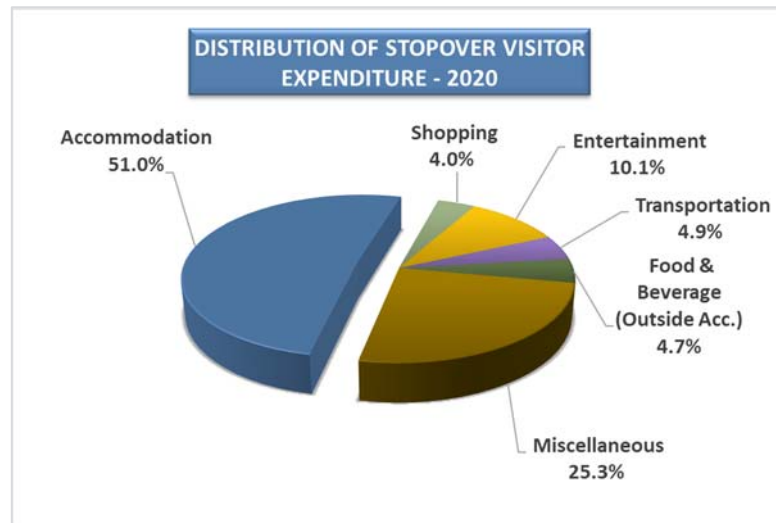
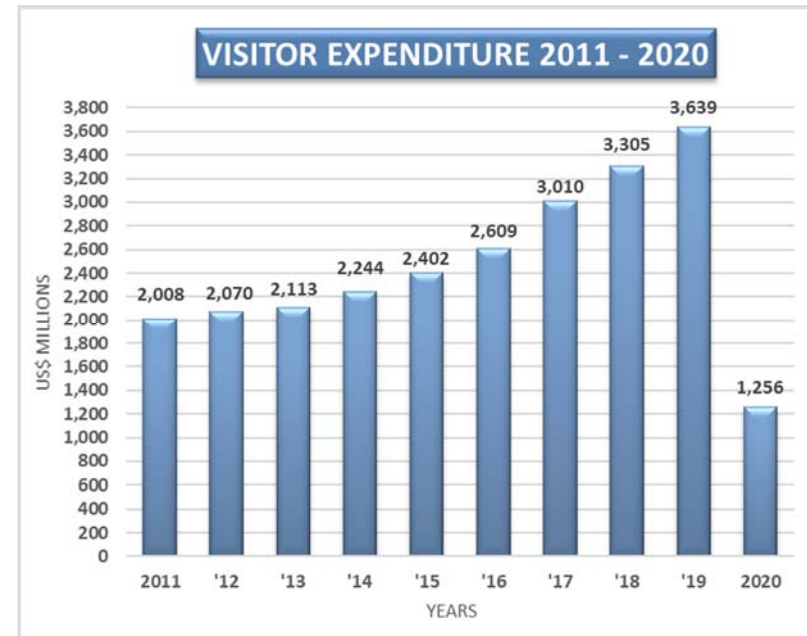
CHARTERED SERVICE	2018	2019	2020	CHARTERED SERVICE	2018	2019	2020
Aerodesierto		Pisco, Peru		Sun Country	Minneapolis	Cincinnati	Dallas
Air Century	Barbados Dom. Rep Havana Punta Cana	Antigua Barbados Cancun Havana La Ramona, Dom. Rep. Puerto Plata Punta Cana Santo Domingo	Barbados Nicaragua Santo Domingo		Fargo Sioux Falls	Dallas Minneapolis Indianapolis	Minneapolis
Air Peace			Lagos	Swift Air	Atlanta Chicago Cincinnati Cleveland Dallas Lansing Milwaukee Nashville Pittsburgh Rockford St. Louis	Atlanta Baton Rouge Cincinnati Louisville Nashville New Orleans Newark Pittsburgh	
Bahamas Air			Nassau				
Condor [Intransit Cruise Passengers]	Dusseldorf Frankfurt Munich	Dusseldorf Frankfurt Munich	Frankfurt Munich				
Cubana Air			Havana				
Evelop Airlines	Madrid			Thomas Cook/Sun Class Air	Arlanda, Sweden	Manchester Arlanda, Sweden	Arlanda, Sweden
Frontier Airlines		Philadelphia Raleigh, NC	Philadelphia	Thompson Fly	Birmingham Cardiff East Midlands Glasgow London/Gatwick Manchester Newcastle	Birmingham Cardiff Dorchester Glasgow Glasgow Newcastle Stanstead London/Gatwick Manchester	Birmingham Cardiff Dorchester Glasgow London/Gatwick Manchester
Miami Air	Hartford, CT Miami Milwaukee Portsmouth, NH	Indianapolis Jacksonville Lansing Milwaukee	Indianapolis Lansing Milwaukee				
Norwind	Sheremetyevo, Russia	Sheremetyevo, Russia	Sheremetyevo, Russia				
Orbest Air	Lisbon	Lisbon					
Sap Airlines		Santo Domingo					
Sunrise Air			Port-au-Prince				

Visitor Expenditure

Gross visitor expenditure in 2020 was estimated at approximately US\$1.256 billion. This represents a decrease of 65.5% against the estimated US\$3,639 billion earned in 2019.

Total expenditure of Foreign Nationals amounted to US\$1.164 billion. Cruise passenger expenditure totaled US\$0.045 billion while US\$0.046 billion was estimated as the contribution of Non-Resident Jamaicans.

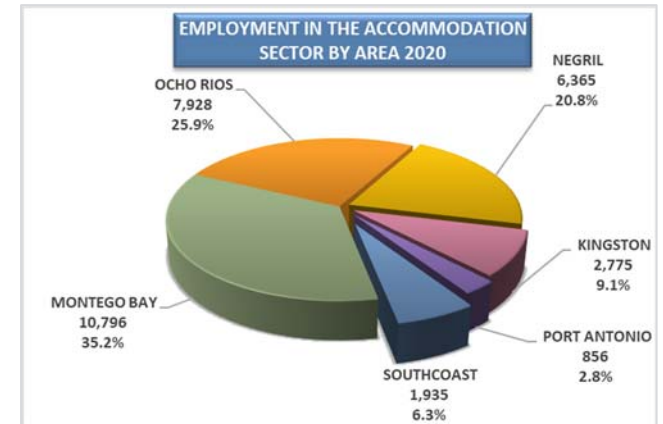
Foreign Nationals spent on the average US\$140.4 per person per night while cruise passengers spent an average of US\$101.22 per person.



Direct Employment in the Accommodation Sector

The number of persons employed directly in the accommodation sub-sector was adversely affected by the closure of properties due to the Covid-19 pandemic. Between April and May approximately 90% of the accommodation staff were laid off and by the end of 2020, 30% of tourism workers had been brought back on a fulltime basis and another 10- 20 % part-time, moving from 51,226 in 2019 to 30,655, a significant decrease of 40.2%.

The main resorts of Montego Bay, Ocho Rios and Negril accounted for 25,089 persons or 81.8% of the total number of persons employed directly in the accommodation sub-sector. Montego Bay with 10,796 direct jobs represented 35.2% of those employed, Ocho Rios with 7,928 accounted for 25.9%, and Negril with 6,365 direct jobs, was responsible for 20.8%. Kingston, Port Antonio and the South coast accounted for the remaining 18.2% of employment in the accommodation sector. The average number of employees per room in 2020 was estimated at 1.22.



New Developments 2020

Airlift

With the border closure as of the 3rd week of March 2020 no international flights operated until the re-opening in June 2020. The resumption of flight operations was restricted to repatriation flights and then the gradual continuation of scheduled service from limited gateways in the US; ATL Atlanta GA, CLT Charlotte NC, DFW Dallas TX, EWR Newark NJ, FLL Ft. Lauderdale FL, JFK New York NY, and MIA Miami FL, and YYZ Toronto Canada. Flights out of the UK resumed in July 2020.

Accommodations

Many of the tourist accommodations closed their doors during April and May with a gradual re-opening once the covid-19 protocols were adopted and put into action. Those to be the first to open were those properties that were situated along the resilient corridor and by the end of 2020 75% of the hotel accommodations were open for business.
