JAMAICA
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%.

1 in 4 net new jobs were created by Travel & Tourism over the last five years.

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>20%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

10.3% Total GDP contribution

330MN Jobs globally (1 in 10 jobs)

31.1% OF TOTAL ECONOMY Total T&T GDP = JMD667.2BN (USD5,025.4MN)

+7.1% 2019 Travel & Tourism GDP growth vs +1.6% real economy GDP growth

JAMAICA 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

31.1% OF TOTAL ECONOMY

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

406.1 JOBS (000's)

(32.8% of total employment)

INTERNATIONAL VISITOR IMPACT

JMD466.7BN in visitor spend (56.7% of total exports)

(USD3,515.3MN)

INBOUND ARRIVALS

1. UNITED STATES 65%
2. CANADA 17%
3. UNITED KINGDOM 9%
4. GERMANY 1%
5. CAYMAN ISLANDS 1%
REST OF WORLD 7%

OUTBOUND DEPARTURES

1. UNITED STATES 71%
2. CANADA 8%
3. BARBADOS 2%
4. CAYMAN ISLANDS 2%
5. CHINA 2%
REST OF WORLD 15%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

- LEISURE SPENDING 82%
- BUSINESS SPENDING 18%
- DOMESTIC SPENDING 21%
- INTERNATIONAL SPENDING 79%

1All values are in constant 2019 prices & exchange rates
As reported in March 2020