# Caribbean Tourism Review

*Industry Update – 3rd QTR 2014*

## 1. Global Performance

Worldwide international arrivals in the first eight months reached 781 million, 36 million more than in the same period of 2013 according to data from the World Tourism Organization (UNWTO). This 4.8% increase signaled the continued strong demand for travel and tourism despite the prevailing lackluster economic performance and the disruptive potential of the Ebola and Chikungunya viruses. Arrivals figures are strong across all regions. Though data is still limited from the Middle East, the latest data indicated that arrivals to this region grew by 3.0% in the January to August period, which was the first recorded increase since 2010. The Americas (7.9%) saw the highest growth so far in 2014, followed by Asia and the Pacific (5.0%). Europe (4.2%) and Africa (3.1%) continued to record solid growth in arrivals while growing at slightly slower rates than the global average. Arrivals to the Caribbean[1] (4.7%) kept pace with the global average. *(See table 1.1 below for more details.)*

Table 1.1: **Performance of International Tourist Arrivals by Region**

| | 2010 | 2011 | 2012 | 2013 | 2014 Jan-Aug |
|---|---|---|---|---|---|
| | Change | | | | |
| World | **6.5%** | **5.1%** | **4.1%** | **4.7%** | **4.8%** |
| **Europe** | 3.1% | 6.6% | 3.7% | 4.8% | 4.2% |
| **Asia and the Pacific** | 13.1% | 6.6% | 6.9% | 6.8% | 5.0% |
| **Americas** | 6.5% | 3.7% | 4.3% | 3.4% | 7.9% |
| **Caribbean** | 1.6% | 2.7% | 4.9% | 1.8% | 4.7% |
| **Africa** | 9.3% | -0.4% | 6.5% | 5.6% | 3.1% |
| **Middle East** | 13.0% | -4.2% | -6.1% | -2.9% | 3.0% |

**Sources: UNWTO, CTO**

[1] Anguilla, Antigua & Barbuda, Aruba, The Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curacao, Dominica, Dominican Republic, Grenada, Guadeloupe/St. Bartholomew/St. Martin, Guyana, Haiti, Jamaica, Martinique, Montserrat, Puerto Rico, Saint Lucia, St. Eustatius, St. Kitts & Nevis, St. Maarten, St. Vincent & the Grenadines, Suriname, Trinidad & Tobago, Turks & Caicos Islands, U.S. Virgin Islands and the Mexican Caribbean (Cancun and Cozumel)

## 2. Caribbean Performance

### 2.1. Tourist (Stop-Over) Arrivals

The momentum in arrivals to the Caribbean which was seen at midyear (+4.5%) continued through the third quarter as in each month an increase in arrivals was recorded, 5.2% in July, 4.8% in August and 8.1% in September which is traditionally the slowest month of the year. Collectively, arrivals grew by an estimated 5.7% in the quarter to total 6.0 million. Thus in the first nine months tourist arrivals increased by approximately 4.9% compared to the same period of last year. This performance translated to 19.9 million tourists arriving in Caribbean destinations, almost a million (931 thousand) more than a year ago. This summer[2] period is shaping to be one of the better summer periods in the last ten years in terms of growth and absolute numbers. So far, growth was measured 4.9% which is only bettered by the similar period of 2012 (on a lower based). *(See Figure 2.1.1 & 2.1.2)*.

*Figure 2.1.1:* Monthly Changes in Tourist Arrivals (Y-o-Y)

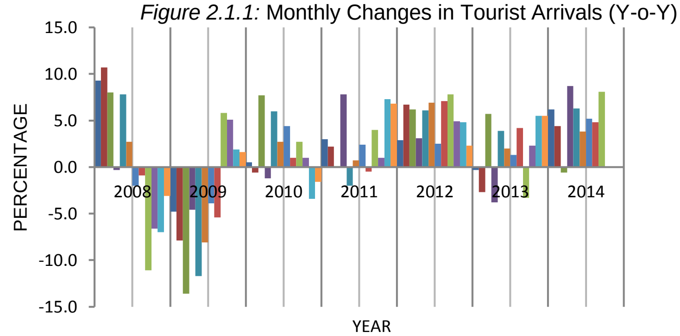
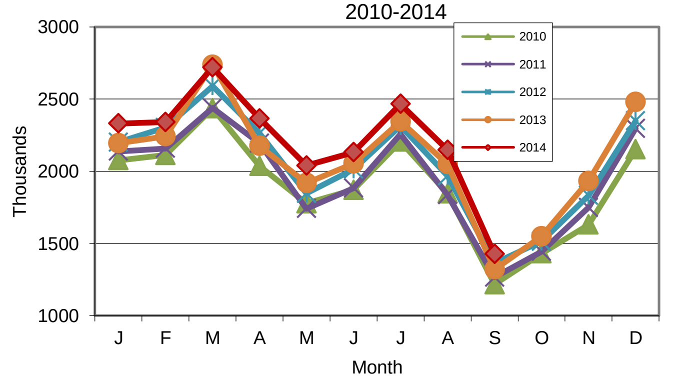



*Figure 2.1.2:* Monthly Tourist (Stop-Over) Arrivals 2010-2014




[2] January-April and May-December are used to approximate the Winter and Summer seasons

The outbound traffic from major markets rose during the review period and Caribbean destinations benefitted. Of the 24 destinations reporting data for at least one month in the third quarter in 2014, Cayman Islands (20.2%), Aruba (13.6%), Grenada (12.6%) and Dominican Republic (11.5%) mustered the biggest gains in their arrival levels. Additionally 13 other destinations improved upon their performance of 2013 with increases ranging from 1.5% (Anguilla) to 9.3% (US Virgin Islands). Six (6) destinations namely Antigua & Barbuda, Barbados, Bermuda, Martinique, Montserrat and St. Kitts & Nevis recorded fewer tourists during the period.
A total of 27 destinations have so far reported data on tourist arrivals for 3 or more months of 2014. Of these, 22 (81%) have reported an increase in tourist arrivals ranging from 1.1% to 25.3% while 4 countries (15%) posted declines between -0.2% and -3.9%. The top 5 performers are Turks & Caicos Islands (25.3%), Grenada (17.6%), Haiti (14.9%), Cayman Islands (12.3%) and Montserrat (12.3%) *(See Appendix for more details).*

By region, the strongest growth was recorded in the US Territories (6.9%), followed by the Dutch Caribbean (6.1%) and OECS Countries (5.0%). The Commonwealth Caribbean had the slowest growth of 3.9%. (*See Figure 2.1.3 & Table 2.1.1*).

*Figure 2.1.3*: Share of Tourist Arrivals by Sub-Region

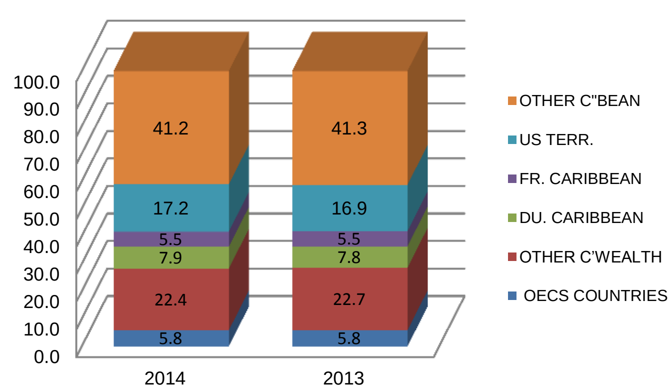



Table 2.1.1: **Tourist Arrivals to the Caribbean by Sub-region Jan - Sep (000s)**

| SUB-REGION | **2014$^e$** | **2013$^e$** | **% CH** |
|---|---|---|---|
| COMMONWEALTH CARIBBEAN | 5,644.3 | 5,433.4 | **3.9** |
| **OECS COUNTRIES** | 1,164.7 | 1,109.4 | **5.0** |
| **OTHER C'WLTH COUNTRIES** | 4,479.7 | 4,324.0 | **3.6** |
| DUTCH CARIBBEAN | 1,576.9 | 1,486.0 | **6.1** |
| FRENCH CARIBBEAN | 1,098.4 | 1,047.2 | **4.9** |
| US TERRITORIES | 3,431.0 | 3,210.0 | **6.9** |
| OTHER CARIBBEAN COUNTRIES | 8,220.2 | 7,862.6 | **4.5** |
| **TOTAL CARIBBEAN** | **19,970.8** | **19,039.1** | **4.9** |
| **of which CARICOM** | 5,280.7 | 5,173.1 | **2.1** |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

The Caribbean has recorded solid growth from all of the major markets during the first nine months of 2014. (*See Table 2.1.2*).

Table 2.1.2: **Tourist Arrivals to the Caribbean by Main Market**

('000)

| MARKETS | **2010** | **2011** | **2012** | **2013** | **2014** | **%CH** |
|---|---|---|---|---|---|---|
| **Total Arrivals** | **17,577.4** | **17,916.0** | **18,867.8** | **19,039.1** | **19,970.8** | **4.9** |
| **United States** | 8,872.4 | 8,891.1 | 9,331.5 | 9,525.8 | 9,964.9 | 4.6 |
| **Canada** | 2,034.1 | 2,201.7 | 2,380.7 | 2,346.2 | 2,455.5 | 4.7 |
| **Europe** | 3,619.9 | 3,682.6 | 3,679.9 | 3,514.8 | 3,683.1 | 4.8 |
| **Other** | 3,050.9 | 3,140.6 | 3,475.6 | 3,652.4 | 3,867.3 | 5.9 |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

Following an encouraging first half performance, the growth in tourist arrivals from the United States market was sustained in the third quarter to register 4.6% for the first nine months. Tourist arrivals moved from 9.5 million to 10.0 million in this period (*See Table 2.1.3).* Dominican Republic (12.4%) and Puerto Rico (5.7%) were among the larger[3] destinations with strong growth while Montserrat (11.7%), Saint Lucia (12.0%), Grenada (18.3%) and Belize (10.4%) were among the smaller destinations with robust growth. Only six (6) of the 23 reporting destinations recorded losses from this market. The contractions recorded by Anguilla, Barbados, Bermuda, Curacao, St. Kitts & Nevis and St. Vincent & the Grenadines ranged from -0.4% to -18.6%.

[3] Size of country in excess of 10,000 sq kms and population greater than 1 million.

Table 2.1.3: **Tourist Arrivals from US by Sub-Region**
**('000)**

| REGION | 2010 | 2011 | 2012 | 2013 | 2014 | % CH |
|---|---|---|---|---|---|---|
| **Commonwealth Countries** | 2,875.9 | 2,857.7 | 2,983.6 | 2,925.6 | 2,951.5 | 0.9 |
| **OECS Countries** | 289.0 | 289.7 | 295.3 | 303.2 | 323.5 | 6.7 |
| **Other Commonwealth** | 2,586.9 | 2,568.0 | 2,688.3 | 2,622.3 | 2,628.0 | 0.2 |
| **Other Caribbean** | 5,996.5 | 6,033.4 | 6,347.9 | 6,600.2 | 7,013.4 | 6.3 |
| **Total Caribbean** | **8,872.4** | **8,891.1** | **9,331.5** | **9,525.8** | **9,964.9** | **4.6** |
| **of which CARICOM** | 2,538.9 | 2,499.1 | 2,622.4 | 2,552.3 | 2,562.2 | 0.4 |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

In the case of Canada, increases in the high-volume destinations of Cuba (4.4%), Dominican Republic (2.5%) and Jamaica (6.8%) factored significantly in the overall performance in this market. There were an additional 8 destinations recording increases from this market so that tourist arrivals grew by an estimated 4.7% or an additional 100 thousand when compared to the 2.3 million who visited in 2013 (*See Table 2.1.4)*. Antigua & Barbuda, Aruba, Barbados, Puerto Rico *(hotel registrations only)*, St. Vincent and the Grenadines and Suriname reported declines between -2.0% and -7.0%.

Table 2.1.4: **Tourist Arrivals from Canada by Sub-Region**
**('000)**

| REGION | 2010 | 2011 | 2012 | 2013 | 2014 | % CH |
|---|---|---|---|---|---|---|
| **Commonwealth Countries** | 541.1 | 601.9 | 641.6 | 619.0 | 661.5 | 6.9 |
| **OECS Countries** | 58.8 | 63.2 | 67.3 | 73.1 | 78.0 | 6.8 |
| **Other Commonwealth** | 482.3 | 538.7 | 574.3 | 545.9 | 583.5 | 6.9 |
| **Other Caribbean** | 1,493.0 | 1,599.8 | 1,739.1 | 1,727.2 | 1,794.0 | 3.9 |
| **Total Caribbean** | **2,034.1** | **2,201.7** | **2,380.7** | **2,346.2** | **2,455.5** | **4.7** |
| **of which CARICOM** | 504.6 | 561.1 | 599.9 | 580.0 | 620.8 | 7.0 |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

The turnaround in arrivals from the UK (*See Table 2.1.6)* coupled with an increasing number of German visitors into the region positively affected the overall performance in the European market. The European market was still in recovery mode during the third quarter of 2014 as arrivals rose by approximately 1.8% which was significantly lower than the growth recorded during the previous two quarters. The regional growth in arrivals stood at 4.8% for the January to September period accounting for 3.7 million tourist trips. (*See Table 2.1.5)* This was achieved with 17 countries reporting gains from this market ranging from 3% to 35%. The bulk of the growth has so far come from Cuba, the Dominican Republic, Jamaica and Barbados although solid performances were also seen in Belize, Cayman Islands and Dominica. Four destinations (The Bahamas, Bermuda, Montserrat and St. Vincent & the Grenadines) did not improve upon last year's performance and recorded decreases in the range -0.1% to -9.0%.

Table 2.1.5: **Tourist Arrivals from Europe by Sub-Region**
**('000)**

| REGION | 2010 | 2011 | 2012 | 2013 | 2014 | % CH |
|---|---|---|---|---|---|---|
| **Commonwealth Countries** | 708.9 | 717.6 | 676.0 | 685.9 | 745.2 | 8.7 |
| **OECS Countries** | 189.0 | 197.0 | 194.4 | 185.9 | 199.3 | 7.2 |
| **Other Commonwealth** | 519.9 | 520.6 | 481.6 | 500.0 | 545.9 | 9.2 |
| **Other Caribbean** | 2,911.0 | 2,965.0 | 3,003.9 | 2,828.9 | 2,937.9 | 3.9 |
| **Total Caribbean** | **3,619.9** | **3,682.6** | **3,679.9** | **3,514.8** | **3,683.1** | **4.8** |
| **of which CARICOM** | 746.0 | 752.9 | 713.9 | 712.6 | 768.2 | 7.8 |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

Table 2.1.6: **Tourist Arrivals from United Kingdom by Sub-Region**
**('000)**

| REGION | 2010 | 2011 | 2012 | 2013 | 2014 | % CH |
|---|---|---|---|---|---|---|
| **Commonwealth Countries** | 468.7 | 478.5 | 441.6 | 441.3 | 481.0 | 9.0 |
| **OECS Countries** | 139.1 | 145.4 | 144.7 | 139.7 | 148.1 | 6.0 |
| **Other Commonwealth** | 329.6 | 333.2 | 296.9 | 301.6 | 332.9 | 10.4 |
| **Other Caribbean** | 332.1 | 321.1 | 261.1 | 261.9 | 250.9 | -4.2 |
| **Total Caribbean** | **800.8** | **799.7** | **702.7** | **703.2** | **731.9** | **4.1** |
| **of which CARICOM** | 439.5 | 450.3 | 414.9 | 411.6 | 449.1 | 9.1 |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

Intra-Regional Travel rose by an estimated 1.7% in the first nine months due to the strong performance in the non-English speaking destinations which dominate the Other Caribbean region. The Commonwealth Caribbean continued to struggle in this market as arrivals contracted by 2.4%. *(Refer to Table 2.1.7).* A total of 9 destinations registered gains between 1.0% and 30.9% with an equal number recording declines ranging between -3.8% and -12.1%. The best performances were seen in Dominican Republic (30.9%), Montserrat (29.7%), St. Maarten (6.1%), St. Kitts & Nevis (3.5%) and Jamaica (2.5%).

Table 2.1.7: **Intra-Caribbean Arrivals by Sub-Region**
**('000)**

| REGION | 2010 | 2011 | 2012 | 2013 | 2014 | % CH |
|---|---|---|---|---|---|---|
| **Commonwealth Countries** | 385.1 | 385.9 | 387.1 | 383.0 | 373.7 | -2.4 |
| **OECS Countries** | 180.2 | 161.7 | 160.9 | 157.9 | 151.5 | -4.0 |
| **Other Commonwealth** | 204.9 | 224.2 | 226.2 | 225.2 | 222.2 | -1.3 |
| **Other Caribbean** | 209.7 | 228.4 | 250.4 | 260.4 | 280.8 | 7.8 |
| **Total Caribbean** | **594.8** | **614.3** | **637.5** | **643.4** | **654.5** | **1.7** |
| **of which CARICOM** | 409.6 | 412.9 | 423.1 | 425.5 | 412.9 | -3.0 |

**Note: Imputed from data on international travel to member countries.**
**Source: CTO Member Countries and CTO estimates.**

## 2.2. Caribbean Performance - Cruise Activity

The available data points to a significant increase in the number of cruise passenger visits to Caribbean destinations up to September this year with individual results being mostly positive. At the end of the first nine months there were an estimated 17.5 million cruise passenger arrivals to the Caribbean, 11.0% higher than a year ago. While some small to medium destinations in the Eastern/Southern Caribbean - Antigua & Barbuda, Aruba, Barbados and St. Vincent and the Grenadines- recorded declines between -0.6% and -8.4%, some of the high-volume destinations in the Western/Northern Caribbean - Cozumel, Cayman Islands and Jamaica - reported appreciable growth. Indeed, the best five performers were Martinique (100.2%), Belize (44.9%), Turks & Caicos Islands (39.9%), Dominica (37.6%) and Cozumel (24.4%), all of which had more cruise ship calls than in the previous year. (*Refer to Table2.2.1 and Figure 2.2.1).*

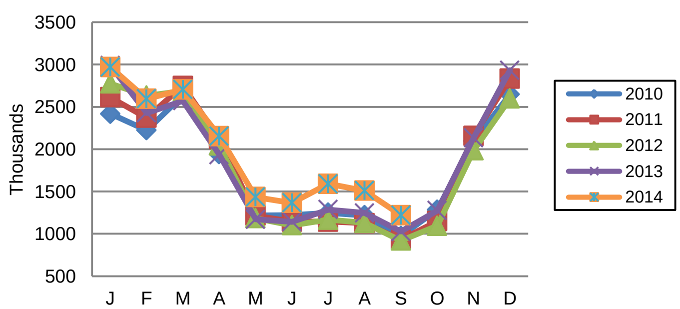
Table 2.2.1: **Cruise Passenger Arrivals to the Caribbean 2010 - 2014 ('000)**

| | 2010 | 2011 | 2012 | 2013 | 2014 | %CH |
|---|---|---|---|---|---|---|
| **Cruise Pax** | **14,033.9** | **15,099.6** | **15,636.5** | **15,795.5** | **17,538.7** | **11.0** |

**NOTE: Imputed from data on Cruise Passenger travel to member countries**

**Source: CTO Member Countries and CTO estimates.**

*Figure 2.2.1*: Monthly Cruise Passenger Arrivals 2010-2014




## 3. Accommodation performance[4]

The Caribbean hotel industry continued to record positive results in 2014. Even though Occupancy rates have remained virtually flat over the last two years, Average Room Rates and Revenue per Available Room (RevPar) have been trending upwards. The Average Room Rates in the Caribbean for the first nine months climbed to US$195.17, 6.9% higher than a year ago while there was a similar increase in RevPar which reached US$137.36 compared to US$128.67. These positive outcomes coupled with a 1.0% increase in available rooms gave rise to an 8.9% increase in Room Revenue for the first nine months of 2014. (*refer to Table 3.1 & Figure 3.1*). During the period, five destinations (Cancun, Dominican Republic, Jamaica, Trinidad & Tobago, and Turks & Caicos Islands) recorded growth in each of the five hotel performance measures. While in Bahamas and Cayman Islands a marginal decline in the room stock this year did not adversely affect the other four indicators.

**Table 3.1**: Caribbean Hotel Performance 2010-2014 (January-September*)

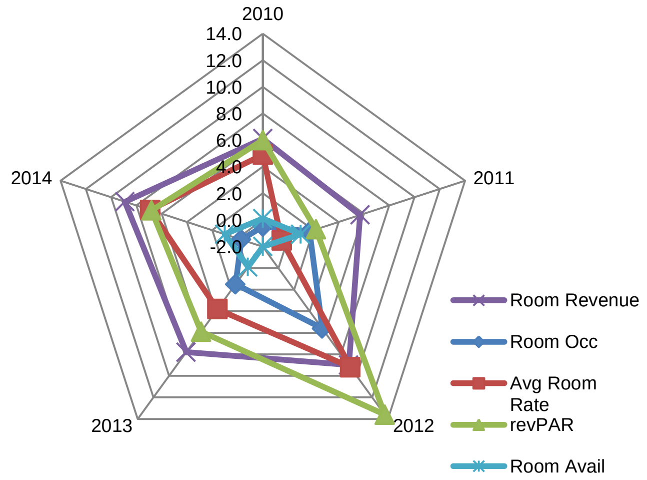
| | 2010 | 2011 | 2012 | 2103 | 2014 | %CH |
|---|---|---|---|---|---|---|
| Percent Room Occupancy (%) | 63.5 | 64.6 | 68.2 | 69.2 | 69.0 | -0.3 |
| Average Room Rate (US$) | 161.90 | 161.02 | 175.78 | 182.51 | 195.17 | 6.9 |
| Revenue per Available Room (US$) | 104.63 | 106.98 | 121.50 | 128.67 | 137.36 | 6.8 |
| % change Room Revenue | 6.1 | 5.7 | 9.0 | 7.8 | 8.9 | |
| %change Room Available | 0.1 | 1.0 | -2.0 | -0.1 | 1.0 | |

Notes: *- Averaged over the given period. The information contained in this table is based upon independent surveys and research from sources considered reliable but no representation is made as to its completeness or accuracy.



[4] The coverage of accommodation sector by STR although not exhaustive has been increasing over the years and is very indicative of the performance in the hotel sector. The data in these reports now represents at least 26% of the total room stock in 10% of total accommodation establishments. These numbers vary by destination and in some instances reach upwards of 75%, while some smaller destinations do not participate in the survey.

*Figure 3.1* - Changes in Caribbean Hotel Indicators




## 4. Air Capacity

Global data from IATA indicated that revenue passenger-kilometres[5] for international travel rose by 6.3% during January to September 2014. By region, the Middle East recorded the strongest growth at 13.4% followed by the Asia/Pacific, Latin America and Europe. All grew by close to 6.0%. North America grew by 3.4%. Africa recorded weakest growth at 1.3%.

## 5. Outlook and Conclusion

At the beginning of the year, CTO indicated that arrivals to the Caribbean region should grow between 2% and 3% in 2014. The performance to date has surpassed this modest projection. Globally, outbound travel is still very desirous and according to UNWTO, bookings for international trips in the last quarter are up by 5 %[6]. In recent weeks oil prices on the world market have been steadily declining and are at lows not seen in recent years. The Caribbean region should therefore expect to see an almost doubling of the predicted growth, 4% to 6%.

## About the Caribbean Tourism Organization

The Caribbean Tourism Organization (CTO), with headquarters in Barbados and offices in New York and London, is the Caribbean's tourism development agency comprising membership of over 30 countries and territories including Dutch, English, French and Spanish, as well as a myriad of private sector allied members. The CTO's vision is to position the Caribbean as the most desirable, year round, warm weather destination by 2017, and its purpose is Leading Sustainable Tourism - One Sea, One Voice, One Caribbean.

Among the benefits to its members the organization provides specialized support and technical assistance in sustainable tourism development, marketing, communications, advocacy, human resource development, research and information technology.

In addition, the CTO, in partnership with the Caribbean Hotel & Tourism Association, jointly and equally owns the Caribbean Tourism Development Company, a marketing and business development entity dedicated to promoting the Caribbean brand worldwide.

The CTO's Headquarters is located at Baobab Tower, Warrens, St. Michael, Barbados BB 22026; Tel: (246) 427-5242; Fax: (246) 429-3065; E-mail: CTObarbados@caribtourism.com.

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For more information on the Caribbean Tourism Organization please visit www.OneCaribbean.org.

Get the latest CTO updates on Twitter at http://www.twitter.com/ctotourism.

Connect with CTO on Facebook at http://www.facebook.com/CaribbeanTourismOrganization.

[5] Refer to the Glossary of Indicators in the Appendix

[6] World Tourism Barometer Volume 12, October 2014

# APPENDIX

**Table A1 - Tourist (Stop-Over) Arrivals And Cruise Passenger Visits In 2014**

| Destination | Tourist Arrivals | | | Cruise Passenger Visits | | |
|---|---|---|---|---|---|---|
| | **Period** | **Tourists** | **% Change 2014/13** | **Period** | **Cruise Passengers** | **% Change 2014/13** |
| Anguilla | Jan-Sep | 53,969 | 2.3 | - | - | - |
| Antigua & Barbuda * | Jan-Sep | 188,127 | 3.6 | Jan-Sep | 357,883 | -8.4 |
| Aruba | Jan-Sep | 772,380 | 8.2 | Jan-Sep | 466,351 | -2.7 |
| Bahamas P | Jan-Jul | 924,898 | 3.5 | Jan-Aug | 3,201,205 | 2.4 |
| Barbados P | Jan-Sep | 376,716 | -0.8 | Jan-Sep | 393,315 | -1.8 |
| Belize P | Jan-Sep | 250,594 | 11.1 | Jan-Sep | 694,685 | 44.9 |
| Bermuda * | Jan-Sep | 181,841 | -3.9 | Jan-Sep | 320,482 | 9.5 |
| British Virgin Islands | Jan-Sep | 296,244 | 4.4 | Jan-Sep | 278,327 | 5.2 |
| Cayman Islands | Jan-Sep | 293,652 | 12.3 | Jan-Sep | 1,175,115 | 19.1 |
| Cozumel (Mexico) | - | - | - | Jan-Sep | 2,463,410 | 24.4 |
| Cuba | Jan-Sep | 2,222,793 | 3.7 | - | - | - |
| Curacao | Jan-Sep | 323,822 | -0.2 | Jan-Sep | 443,432 | 10.1 |
| Dominica P | Jan-Sep | 60,149 | 4.9 | Jan-Sep | 189,716 | 37.6 |
| Dominican Republic * | Jan-Sep | 3,891,276 | 9.4 | Jan-Sep | 317,365 | 11.1 |
| Grenada P | Jan-Jul | 77,839 | 17.6 | Jan-Jul | 153,064 | 14.9 |
| Haiti | Jan-Mar | 114,501 | 14.9 | Jan-Jun | 368,942 | 6.3 |
| Jamaica | Jan-Sep | 1,573,585 | 2.5 | Jan-Sep | 1,007,901 | 10.0 |
| Martinique | Jan-Sep | 389,723 | 1.6 | Jan-Sep | 142,269 | 100.2 |
| Montserrat | Jan-Sep | 5,783 | 12.3 | - | - | - |
| Puerto Rico ** | Jan-Aug | 1,202,328 | 5.7 | Jan-Aug | 859,289 | 10.0 |
| Saint Lucia | Jan-Sep | 255,010 | 6.0 | Jan-Sep | 432,816 | 4.9 |
| St. Kitts & Nevis ^ | Jan-Jul | 65,872 | 1.1 | Jan-Aug | 434,106 | 16.9 |
| St. Maarten * | Jan-Sep | 377,341 | 7.3 | Jan-Sep | 1,459,233 | 16.3 |
| St. Vincent & the G'dines | Jan-Sep | 52,673 | -1.7 | Jan-Sep | 55,411 | -0.6 |
| Suriname | Jan-May | 96,389 | 2.9 | - | - | - |
| Trinidad & Tobago *** | Jan-Aug | 279,932 | - | - | - | - |
| Turks & Caicos Islands | Jan-Jun | 199,347 | 25.3 | Jan-Jun | 477,590 | 39.9 |
| U S Virgin Islands | Jan-Sep | 561,946 | 3.1 | Jan-Sep | 1,472,104 | 4.0 |

** Non-Resident Air Arrivals    **Non-Resident Hotel registrations only    *** Air Arrivals by Nationality*
*^ Excludes data from Vance M. Amory Int'l Airport in Nevis    P Preliminary figures    n New Series*
*n.a. Figures not available  - No Cruise Figures are Reported*
N.B: Figures are subject to revision by reporting countries
**SOURCE** - Data supplied by member countries and available as at January 27, 2015

**Table A2 - Arrivals by Main Market - 2014**

| Destination | Period | United States | | Canada | | Europe | | Other | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Tourists | % ch. | Tourists | % ch. | Tourists | % ch. | Tourists | % ch. | Tourists | % ch. |
| Anguilla | Jan-Sep | 34,239 | -1.1 | 2,937 | 11.5 | 6,041 | 8.2 | 10,752 | 8.4 | 53,969 | 2.3 |
| Antigua & Barbuda * | Jan-Sep | 73,609 | 9.4 | 21,599 | -6.8 | 66,344 | 3.9 | 26,575 | -2.6 | 188,127 | 3.6 |
| Aruba | Jan-Sep | 433,626 | 2.1 | 30,832 | -5.7 | 60,214 | 6.0 | 247,708 | 23.9 | 772,380 | 8.2 |
| Bahamas [P] | Jan-Jul | 726,772 | 2.7 | 91,402 | 17.7 | 49,499 | -1.1 | 57,225 | -2.8 | 924,898 | 3.5 |
| Barbados [P] | Jan-Sep | 87,235 | -4.7 | 46,695 | -7.2 | 163,821 | 7.8 | 78,965 | -8.3 | 376,716 | -0.8 |
| Belize [P] | Jan-Sep | 157,093 | 10.4 | 20,834 | 4.7 | 29,549 | 23.8 | 43,118 | 8.7 | 250,594 | 11.1 |
| Bermuda | Jan-Mar | 19,650 | -1.7 | 6,268 | -0.1 | 3,752 | -4.5 | 1,279 | 15.4 | 103,787 | -2.4 |
| Cayman Islands | Jan-Sep | 224,410 | 9.4 | 17,998 | 8.0 | 26,562 | 35.3 | 24,682 | 22.0 | 293,652 | 12.3 |
| Cuba [1] | Jan-Sep | - | - | 897,018 | 4.4 | 527,831 | 5.4 | 797,944 | 1.8 | 2,222,793 | 3.7 |
| Curacao | Jan-Sep | 39,952 | -18.6 | 8,942 | 23.1 | 136,859 | 5.6 | 138,069 | -0.2 | 323,822 | -0.2 |
| Dominica [P] | Jan-Sep | 15,526 | 8.9 | 2,234 | 0.5 | 10,957 | 13.1 | 31,432 | 0.7 | 60,149 | 4.9 |
| Dominican Republic * | Jan-Sep | 1,408,879 | 12.4 | 548,449 | 2.5 | 867,942 | 5.2 | 1,066,006 | 12.3 | 3,891,276 | 9.4 |
| Grenada [P] | Jan-Jul | 19,855 | 18.3 | 8,482 | 39.6 | 19,114 | 17.9 | 30,388 | 12.0 | 77,839 | 17.6 |
| Jamaica | Jan-Sep | 992,707 | 0.5 | 312,745 | 6.0 | 189,754 | 8.9 | 78,379 | 0.8 | 1,573,585 | 2.5 |
| Montserrat | Jan-Sep | 1,373 | 11.7 | 461 | 20.4 | 1,486 | -9.2 | 2,463 | 29.4 | 5,783 | 12.3 |
| Puerto Rico ** | Jan-Aug | 1,101,880 | 5.9 | 15,343 | -4.7 | 23,818 | 9.1 | 61,287 | 4.1 | 1,202,328 | 5.7 |
| Saint Lucia | Jan-Sep | 109,887 | 12.0 | 29,770 | 9.2 | 69,733 | 9.1 | 45,620 | -10.9 | 255,010 | 6.0 |
| St. Kitts & Nevis ^ | Jan-Jul | 42,052 | -4.1 | 5,465 | 27.0 | 6,458 | 9.5 | 11,897 | 7.0 | 65,872 | 1.1 |
| St. Maarten | Jan-Sep | 204,428 | 9.0 | 38,060 | 14.2 | 79,507 | 2.7 | 55,346 | 3.4 | 377,341 | 7.3 |
| St. Vincent & the G'dines | Jan-Sep | 14,949 | -0.6 | 5,183 | -1.9 | 14,972 | -0.2 | 17,569 | -3.8 | 52,673 | -1.7 |
| Suriname | Jan-May | 3,001 | 7.2 | 750 | -4.5 | 42,589 | 12.6 | 50,049 | -4.2 | 96,389 | 2.9 |
| Trinidad & Tobago *** | Jan-Aug | 107,469 | - | 37,099 | - | 46,064 | - | 89,300 | - | 279,932 | - |
| Turks & Caicos Islands | Jan-Jun | 161,385 | - | 22,593 | - | 3,807 | - | 11,562 | - | 199,347 | - |

** Non-Resident Air Arrivals    **Non-Resident Hotel registrations only    *** Air Arrivals by Nationality    - missing data*

*^ Excludes data from Vance M. Amory Int'l Airport in Nevis    [P] Preliminary figures    [1] USA total included in Other*

*N.B U.S.V.I reported figures in this tables are Hotel Registrations whereas they reported Stay Over totals are Air Arrivals*

*N.B: Figures are subject to revision by reporting countries*

*ata supplied by member countries and available as at January 27, 2015*

**Table A3: Tourist Arrivals Into The Caribbean From Major European Markets – 2014**

| Country | PERIOD | EUROPE | | UNITED KINGDOM | | FRANCE | | GERMANY | | ITALY | | HOLLAND | | SWEDEN | | SPAIN | | OTHER | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2014 | % CH | 2014 | % CH | 2014 | % CH | 2014 | % CH | 2014 | % CH | 2014 | % CH | 2014 | % CH | 2014 | % CH | 2014 | % CH |
| Anguilla | Jan-Sep | 6,041 | 8.2 | 1,983 | -2.8 | . | . | 682 | 151.7 | 871 | 11.1 | . | . | . | . | . | . | 2,505 | 0.8 |
| Antigua & Barbuda* | Jan-Sep | 66,344 | 3.9 | 51,531 | 3.8 | 1,637 | 38.7 | 1,761 | 9.9 | 6,268 | 1.8 | 227 | 3.2 | 497 | 16.7 | 470 | 24.3 | 3,953 | -7.0 |
| Aruba | Jan-Sep | 60,214 | 6.0 | 8,920 | 13.0 | . | . | 3,107 | 19.4 | 5,684 | 43.3 | 27,603 | -2.2 | 3,811 | -10.9 | 1,323 | 13.4 | 9,766 | 12.1 |
| Barbados [P] | Jan-Sep | 163,821 | 7.8 | 132,721 | 7.6 | . | . | 7,713 | 13.0 | . | . | . | . | . | . | . | . | 23,387 | 7.3 |
| Belize [P] | Jan-Sep | 29,549 | 23.8 | 8,683 | 24.3 | 3,230 | 44.4 | 3,557 | 29.2 | 1,994 | 47.1 | 1,916 | 3.3 | 1,086 | 33.7 | 1,258 | 22.6 | 7,825 | 14.3 |
| Bermuda | Jan-Mar | 3,752 | -4.5 | 3,140 | -3.7 | 79 | 25.4 | 154 | -33.6 | 45 | -8.2 | . | . | 71 | 97.2 | . | . | 263 | -8.4 |
| Cayman Islands | Jan-Sep | 26,562 | 35.3 | 10,712 | 6.1 | . | . | . | . | . | . | . | . | . | . | . | . | 15,850 | 66.2 |
| Cuba | Jan-Sep | 527,831 | 5.4 | 91,922 | -19.8 | 73,472 | 3.3 | 93,479 | 14.3 | 83,821 | 16.8 | 24,542 | 0.8 | 7,579 | 132.5 | 57,431 | 5.8 | 95,585 | 20.3 |
| Curacao | Jan-Sep | 136,859 | 5.6 | 1,897 | 5.3 | 1,685 | -17.2 | 13,721 | 12.2 | 831 | -19.9 | 103,931 | 5.0 | 1,311 | 35.7 | 762 | -23.8 | 12,721 | 9.8 |
| Dom Republic * | Jan-Sep | 867,942 | 5.9 | 93,269 | 12.7 | 174,760 | -2.3 | 159,058 | 8.7 | 60,681 | 1.7 | 24,232 | -5.2 | 9,551 | 28.7 | 115,553 | 4.9 | 230,858 | 10.5 |
| Dominica [P] | Jan-Sep | 10,957 | 13.1 | 3,517 | 5.0 | 4,073 | 19.7 | 1,111 | 5.1 | 126 | 22.3 | 253 | 82.0 | 266 | 35.0 | 86 | 21.1 | 1,525 | 11.6 |
| Grenada [P] | Jan-Jul | 19,114 | 17.9 | 14,512 | 17.4 | 599 | -41.8 | 893 | 87.6 | 318 | 116.3 | . | . | 351 | 258.2 | . | . | 2,441 | 16.5 |
| Jamaica | Jan-Sep | 189,754 | 8.9 | 127,678 | 13.2 | 8,720 | -14.9 | 14,968 | 10.5 | 6,621 | 17.4 | 4,574 | 12.2 | 4,782 | 283.5 | 1,862 | -1.8 | 20,549 | -17.0 |
| Montserrat | Jan-Sep | 1,486 | -9.2 | 1,279 | -3.4 | . | . | . | . | . | . | . | . | . | . | . | . | 207 | -33.7 |
| Puerto Rico ** | Jan-Aug | 23,818 | 9.1 | 3,050 | 3.4 | 2,190 | 28.0 | 3,270 | -0.2 | 1,529 | 11.5 | 945 | 12.1 | 609 | -18.3 | 3,356 | 31.7 | 8,869 | 5.8 |
| Saint Lucia | Jan-Sep | 69,733 | 9.1 | 55,076 | 7.5 | 4,624 | 9.4 | 2,559 | 19.9 | . | . | . | . | . | . | . | . | 7,474 | 17.9 |
| St Kitts And Nevis^ | Jan-Jul | 6,458 | 9.5 | 5,102 | 4.5 | 192 | 10.3 | 199 | 40.1 | 108 | 103.8 | 84 | 33.3 | 78 | 27.9 | 49 | -5.8 | 646 | 38.3 |
| St Maarten * | Jan-Sep | 79,507 | 2.7 | . | . | 50,066 | -1.8 | . | . | 3,077 | 14.3 | 13,096 | 9.5 | . | . | . | . | 13,268 | 12.7 |
| St Vincent & G'dines | Jan-Sep | 14,972 | -0.2 | 11,535 | 2.2 | 630 | -12.7 | 534 | -6.8 | 462 | -23.4 | 78 | -26.4 | 255 | -5.6 | 97 | -5.8 | 1,381 | 3.3 |
| Suriname | Jan-May | 42,589 | 12.6 | 464 | 21.5 | 4,644 | 112.3 | 277 | -9.2 | 369 | 94.2 | 34,948 | 5.9 | 44 | -29.0 | 95 | 35.7 | 1,748 | 8.2 |

** Non-Resident Air Arrivals* *********Non-Resident Hotel registrations only* *^ Excludes data from Vance M. Amory Int'l Airport in Nevis* [P] *Preliminary figures - missing data*
*N.B: Figures are subject to revision by reporting countries*
***SOURCE** - Data supplied by member countries and available as at January 27, 2015*

## Glossary of Tourism Indicators

- Tourists - visitors staying at least 24 hours in the country visited but less than a year
- Same-day - visitors staying less than 24 hours in the country visited.
- Cruise Passengers are regarded as a special type of same-day visitor (even if the ship overnights at the port).
- Yacht Visitors are included among the tourist (stay-over) or same day populations based on their length of stay.
- Length of Stay - Obtained by dividing the number of overnight stays by the number of arrivals. This is usually calculated by country of residence of the guest and the type of accommodation.
- Occupancy Rate - Provides information on differences in the use between various types of accommodation and when measured on a monthly basis measures the seasonal patterns in occupancy. Occupancy can be divided into;
    - Bed Occupancy - The gross occupancy rate of bed places is calculated by dividing the hotel overnight stays by the product of bed places on offer and the number of days in the corresponding month for the same group of establishments, then multiplying the quotient by 100 to express as a percentage.
    - Room Occupancy Rate - For Hotels and similar establishments the net rate of room occupancy is a measure of capacity utilization. It is calculated by dividing the monthly or yearly sum of occupied rooms by the number of rooms available for use, then multiplying the quotient by 100 to express as a percentage.
- Tourism Expenditure - the total consumption expenditure made by a visitor for and during his or her trip and stay at a destination. This can be broken down into;
    - international and domestic tourism expenditure
    - Expenditure on Same-day visits
    - the products to which the expenditure relates to (e.g accommodation, meals and drinks, shopping, entertainment etc...)
- Average Daily Rate (ADR) - Room revenue divided by rooms sold, displayed as the average rental rate for a single room.
- Percent Change - Amount of growth - up, flat, or down - this period versus same period last year (month or year-to-date). Calculated as ((TY - LY) / LY) * 100.
- Revenue (Room Revenue) - Total room revenue generated from the sale or rental of rooms.
- RevPAR (Revenue Per Available Room) - Room revenue divided by rooms available.
- Revenue passenger kilometres (RPK) is a measure of the volume of passengers carried by an airline. A revenue passenger-kilometre is flown when a revenue passenger is carried one kilometre.

## Regional Groupings

**Caribbean**:

**OECS Countries** - Anguilla, Antigua & Barbuda, British Virgin Is., Dominica, Grenada, Montserrat, Saint Lucia, St Kitts & Nevis, St Vincent & Grenadines

**Other Commonwealth Countries** - Bahamas, Barbados, Belize, Bermuda, Cayman Islands, Guyana, Jamaica, Trinidad & Tobago, Turks & Caicos Islands

**Commonwealth Countries** - OECS + Other Commonwealth

**Dutch Caribbean** - Aruba, Bonaire, Curacao, Saba, St Eustatius, St Maarten

**French Caribbean** - Guadeloupe, Martinique

**US Territories** - Puerto Rico, US Virgin Islands

**Other Caribbean** - Cancun, Cozumel, Cuba, Dom Republic, Haiti, Suriname

**CARICOM** - Antigua & Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Lucia, St Kitts & Nevis, St Vincent & Grenadines, Suriname, Trinidad & Tobago

**South America-** Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay, Venezuela