Caribbean Tourism Review

Industry Update – End of Year 2014

1. Global Performance

In the latest release[1] of the World Tourism Barometer, the World Tourism Organization (UNWTO) noted that in the first ten months, the number of international tourists grew by 4.7% to 978 million. In absolute terms that would be some 45 million tourists more than in the same period of 2013. In the most recent press release, it was disclosed that a new record (1.1 billion international arrivals worldwide) was achieved for 2014, a year which was plagued by feeble growth in the world economy. By region, the Americas lead growth with its highest recorded growth rate (7.8%) since 2010. This performance was four times better than the annual average between 2005 and 2013 and doubled the projected performance for 2014. Asia and the Pacific, the fastest growing region in recent times, enjoyed a 5.0% increase while Europe and The Middle East grew at 4.0%. Africa saw a 2.6% rise in tourist arrivals, no doubt hampered by the Ebola outbreak. Reflecting the resurging demand for leisure travel, arrivals to the Caribbean grew by 5.4% outpacing the average global growth rate, during the period. *(See table 1.1 below for more details.).*

Table 1.1: **Performance of International Tourist Arrivals by Region (Jan-Oct)**

	2010	2011	2012	2013	2014 Jan-Oct
	Change				
World	**6.5%**	**5.1%**	**4.1%**	**4.7%**	**4.7%**
Europe	3.1%	6.6%	3.7%	4.8%	4.0%
Asia and the Pacific	13.1%	6.5%	6.9%	6.8%	5.0%
Americas	6.5%	3.5%	4.4%	3.5%	7.8%
Caribbean	1.9%	5.3%	4.9%	0.9%	5.4%
Africa	8.9%	-0.1%	5.2%	4.8%	2.6%
Middle East	13.1%	-3.5%	-5.6%	-3.4%	4.0%

Sources: UNWTO, CTO

2. Caribbean Performance

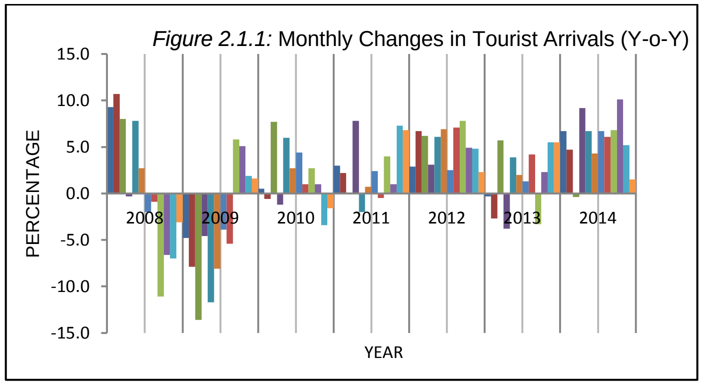
2.1. Tourist (Stop-Over) Arrivals

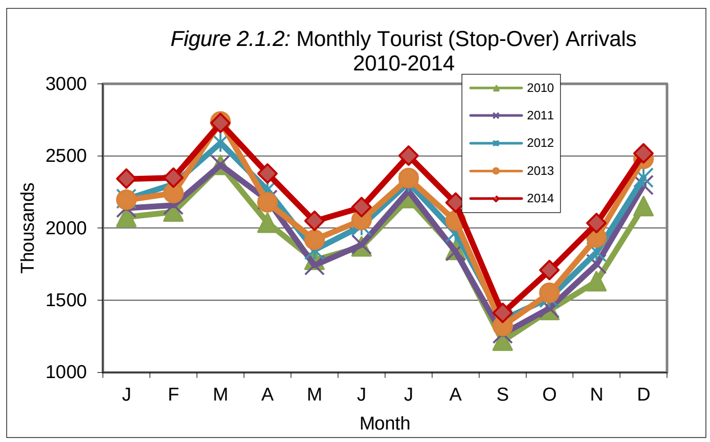
Following on from the three previous quarters, demand continued to be strong throughout the fourth quarter such that each month rose on average 4.9%. This also meant there was a credible performance in the summer[2] period; arrivals grew by 5.6% compared to 2.9% during the previous summer. (*See Figure 2.1.1 & 2.1.2*).

[1] December 2014 with data available up to October 2014.

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

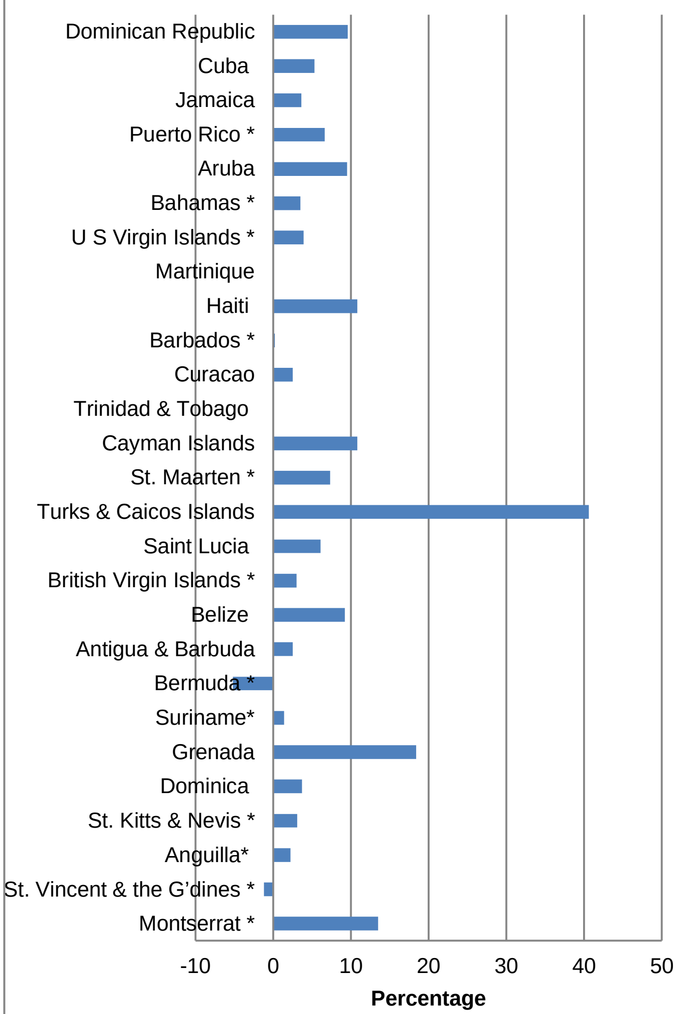
Tourist arrivals to the Caribbean region grew at a faster rate than expected in 2014. Preliminary data for the year indicates that the fifth successive annual increase in tourist arrivals was estimated at 5.3%, well above the expected 2% to 3% growth. This performance produced a record number of trips (26.3 million) which was 1.3 million more than the previous record of a year earlier. Consequently, the region maintained its share (2.3%) of global arrivals.





CTO tracks arrival data from 33 different Caribbean destinations of which 28 have reported data on arrivals during the year. Of these, 24 reported increases in arrivals, two more than at the end of the third quarter. Several of the largest destinations by market share including Dominican Republic, Cuba, Jamaica and Aruba (accounting for 45% of total arrivals) set individual records during the year. Moreover, Aruba's arrivals exceeded the 1 million mark for the first time. The smaller destinations by market share of Belize, Haiti and Saint Lucia also registered record levels of stay-over arrivals *(See Appendix for details)*. The top five performing destinations in tourist arrivals growth of Turks & Caicos Islands (40.6%), Grenada (18.4%), Montserrat (13.5%), Cayman Islands (10.8%) and Haiti (10.8%) registered double-digit increases *(See Figure 2.1.3* *for more details)*. Some of the contributing factors to the successes were increased airline seat capacity, improved airport facilities to accommodate larger aircrafts and more passengers, increased room stock as recognized hotel chains established themselves in the destinations and launched new initiatives in the marketplaces to attract more tourists.

Figure 2.1.3: Change in Tourist Arrivals by volume



The Dutch Caribbean, boosted by the performances in Aruba (9.5%) and St. Maarten (7.3%), saw the highest growth among the sub-regions with a 6.8% increase in arrivals. This was followed by the Other Caribbean Countries (6.4%) and the US Territories (5.7%). All other regions contributed positively to the overall growth with smaller rates. Those regions with growth rates higher than the regional average had marginal increases in their shares of total arrivals. The converse was true for those with lower growth rates. (*See Figure 2.1.4 & Table 2.1.1)*.

Figure 2.1.4: Share of Tourist Arrivals by Sub-Region

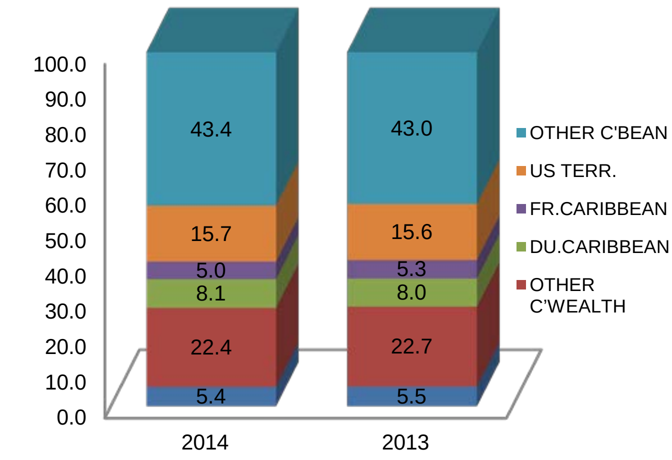


Table 2.1.1: **Tourist Arrivals to the Caribbean by Sub-region (000s)**

SUB-REGION	2014e	2013e	% CH
COMMONWEALTH CARIBBEAN	7,24.7	7,046.8	**3.9**
OECS COUNTRIES	1,427.9	1,368.1	**4.4**
OTHER C'WLTH COUNTRIES	5,896.8	5,678.7	**3.8**
DUTCH CARIBBEAN	2,129.0	1,992.6	**6.8**
FRENCH CARIBBEAN	1,320.0	1,315.8	**0.4**
US TERRITORIES	4,128.7	3,907.7	**5.7**
OTHER CARIBBEAN COUNTRIES	11,423.1	10,739.0	**6.4**
TOTAL CARIBBEAN	**26,326.0**	**25,001.1**	**5.3**
of which CARICOM	6,991.1	6,774.3	**3.2**

Note: Imputed from data on international travel to member countries.

Source: CTO Member Countries and CTO estimates.

Tourists from the traditional markets to the Caribbean came in larger numbers in 2014. The Canadian market improved the most, followed by the US market. (*See Table 2.1.2 & Figure 2.1.5)*.

Outbound travel from the United States to international destinations increased by 6.2% and to the Caribbean[3] by 9.6% by the end of November, according to data from the Office of Travel & Tourism Industries (OTTI)[4]. Data collected from Caribbean destinations showed that the region received an estimated 12.9 million tourists from its main supplier (49.1% of total tourist arrivals) of tourism business. This was an increase of 5.5% over 2013 which had grown by 2.3%.

[3] OTTI definition excludes Belize, Guyana, Puerto Rico, Suriname, US Virgins Islands and the Mexican Caribbean

[4] http://travel.trade.gov/view/m-2014-O-001/index.html

Not only did the usual destinations (Puerto Rico, Dominican Republic, the Bahamas and Jamaica) receive the bulk (56.1% of the total market) of the visitors but they were also among the 14 destinations to have received more American tourists. Grenada (20.6%), Dominican Republic (12.4%), Saint Lucia (11.2%), Montserrat (11.2%) and Suriname (9.2%) topped the performances.

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

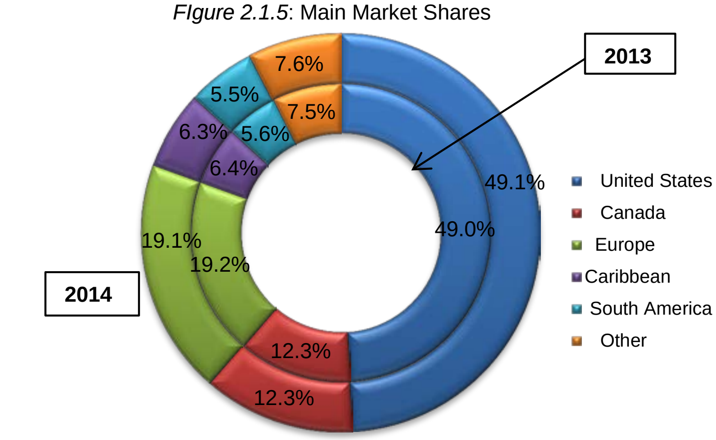
('000)

MARKETS	2010	2011	2012	2013[e]	2014[e]	%ch14/13
Total Arrivals	**22,790.1**	**23,407.0**	**24,564.3**	**25,001.1**	**26,326.0**	**5.3**
United States	11,305.4	11,404.2	11,975.9	12,251.4	12,920.4	5.5
Canada	2,677.0	2,865.0	3,063.5	3,073.4	3,247.6	5.7
Europe	4,857.0	4,962.8	4,916.5	4,812.7	5,036.0	4.6
Caribbean	1,487.0	1,584.4	1,562.8	1,595.2	1,671.7	4.8
South America	900.0	1,195.0	1,390.0	1,403.3	1,456.9	3.8
Other	1,563.7	1,395.7	1,655.6	1,865.2	1,993.4	5.3

Note: Imputed from data on international travel to member countries.

Source: CTO Member Countries and CTO estimates.

FIgure 2.1.5: Main Market Shares



After a marginal performance in 2013, the Canadian market which accounted for about 12.3% of total arrivals rallied to post a 5.7% increase, as more overseas trips[5] were taken by Canadians. This translated to 3.2 million tourists coming to the Caribbean from this market. Cuba and Dominican Republic continued to be the most popular destinations for Canadians hosting of 57.9% of the Caribbean total. However, the highest growth rates of Canadian arrivals were experienced by Grenada (46.8%), Curacao (29.7%), St. Kitts & Nevis (26.9%), Montserrat (20.1%) and The Bahamas (17.7%). In fact, they were among the 12 destinations recording growth in market and the seven (7) with double-digit increases. Nine (9) destinations however failed to see growth in this market during the year. These declines varied between -0.1% and -12.1% *(See Appendix for further details).*

The European market finished the year on a high note as in the final quarter arrivals increased by 3.7%. This growth, coupled with that in the previous quarters, meant that arrivals rose by 4.6% to tally 5.0 million, a first since 2008. Only three destinations recorded declines in arrivals levels during the year. Cayman Islands (30.9%), Belize (20.8%) and Grenada (17.9%) lead the destinations with increases. These good results were also reflected in tourist arrivals originating from United Kingdom (3.2%) and Germany (21.0%)

Demand for intra-regional travel to the OECS remained depressed for the most of 2014. Preliminary estimates suggest that this market segment contracted by 3.1% among the OECS countries. However, when all Caribbean countries are considered the performance in 2014 is better than that of 2013. Estimated Total arrivals were 1.6 million, 4.8% more than last year. Among the better performances were Dominican Republic (30.9%) and Anguilla (8.6%).

2.2. Caribbean Performance - Cruise Activity

The estimated total number of cruise passenger arrivals in the region was 23.9 million, an increase of 8% when compared to 2013. The monthly performances in 2014 were better than the corresponding performances in 2013 with the exception of December which contracted. It should be noted that not all destinations would have provided the December in time for this report. (*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	**21,125.4**	**21,544.2**	**21,313.1**	**22,132.6**	**23,901.3**	**8.0**

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

Source: CTO Member Countries and CTO estimates.

Of the 24 destinations reporting data, 21 destinations achieved increases, 14 of which achieved double-digit increases. Martinique (71.3%), Belize (42.9%), Trinidad & Tobago (30.1%), Turks & Caicos (24.8%) and Dominica (24.3%) were top five performing destinations. By market share, The Bahamas, Cozumel, US Virgin Islands, Cayman

[5] http://en-corporate.canada.travel/sites/default/files/pdf/Research/Stats-figures/International-visitor-arrivals/Tourism-monthly-snapshot/tourismsnapshot_2014_11_eng_lowres.pdf

Islands and St. Maarten are the top five destinations *(See Figure 2.2.2 & Figure 2.2.2).* With the expansion in cruise business to Belize, Cayman Islands, Cozumel, Jamaica and Turks & Caicos Islands, the Western Caribbean is now the largest sub-region for cruise passenger arrivals having displaced the Eastern Caribbean from this position. The islands of the Southern Caribbean did regain some of the capacity which it had lost during the period of high cost fuel *(See Figure 2.2.4).*

Figure 2.2.1: Monthly Cruise Passenger Arrivals 2010-2014

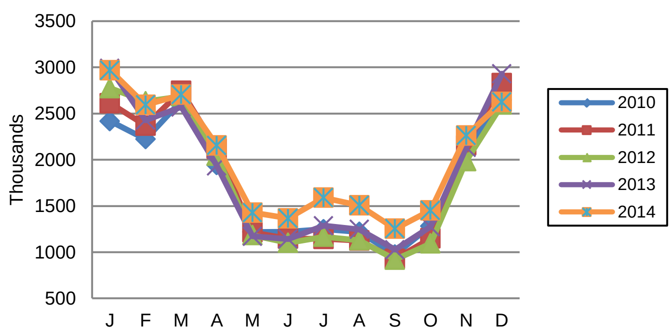


Figure 2.2.2: Change in Cruise Passenger Arrivals by Volume

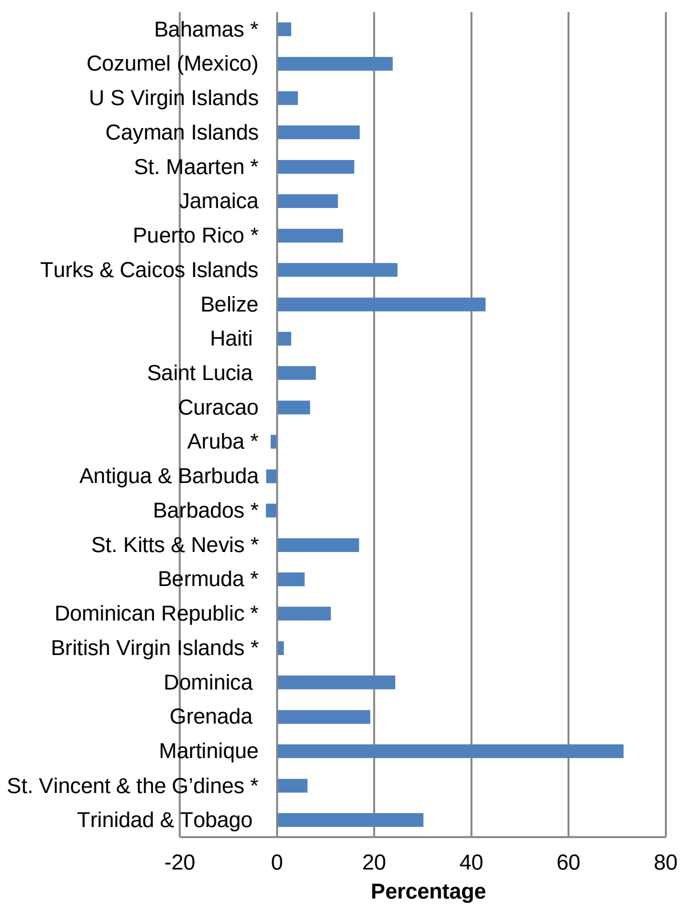


Figure 2.2.3: Main Destinations: % share 2014

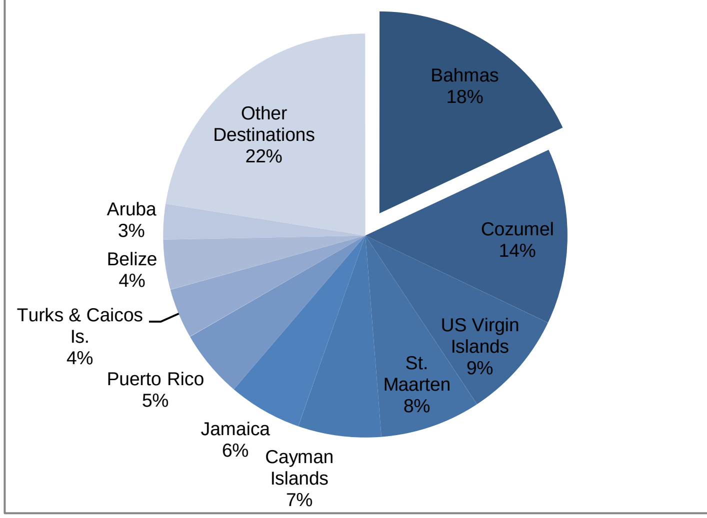
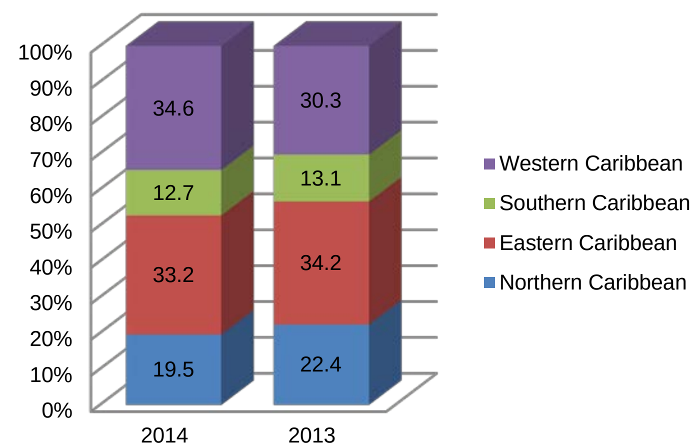


Figure 2.2.4: Cruise Passenger arrivals by region (%share)



3. Accommodation performance[6]

According to Smith Travel Research, the room stock level in the Caribbean expanded marginally in 2014 by 0.8% while 2.4% more rooms were sold than in 2013. Most destinations gained positive results in at least one of these measures. Consequently, the Room Occupancy Rate improved from 67.1 % to 68.0%. The positive trend in the Average Room Rate (ADR) and Revenue per Available Room (RevPar)

[6] 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.

continued through to the end of the year. Despite some dampening in the growth during the summer period, ADR stood at US$194.66 or US$8.10 (4.3%) higher and RevPar was US$132.28 or US$7.08 (5.7%) more. (*Refer to Table 3.1 & Figure 3.1*). Among the destinations Saint Lucia, Jamaica, Aruba, Turks & Caicos Islands and Dominican Republic lead the performances in ADR and RevPar with increases above 10.0%. While the top five destinations with improved occupancy rates were Saint Lucia (12.6%), Turks & Caicos Islands (7.5%), Jamaica (6.3%), Barbados (5.1%) and US Virgin Islands (5.1%).

Table 3.1: Caribbean Hotel Performance 2010-2014

	2010	2011	2012	2103	2014	%CH
Percent Room Occupancy (%)	61.1	61.8	66.3	67.1	68.0	1.3
Average Room Rate (US$)	161.41	167.56	175.62	186.55	194.66	4.3
Revenue per Available Room (US$)	98.66	103.59	116.40	125.20	132.28	5.7
% change Room Revenue	3.8	5.2	10.9	7.6	8.9	
%change Room Available	0.5	0.9	-1.8	-0.0	0.8	

Notes: 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.

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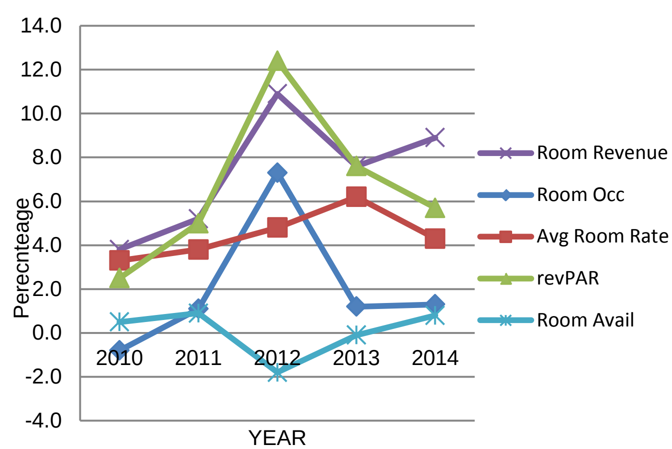
Figure 3.1: Changes in Caribbean Hotel Indicators



4. Air Capacity

Results through to November from IATA showed that 2014 was a strong year for air travel. During the eleven months of the year, international air travel increased by 6.1% with the load factors remaining relatively high (79.3%). By region, the strongest growth was registered in the Middle East (12.9%) followed by Latin America and the Caribbean, LAC, (6.0%), Europe (5.7%) and Asia and the Pacific (5.6%).

5. Visitor Expenditure

Most of the destinations do not produce monthly estimates of visitor expenditure and annual compilation of this indicator normally lags that of other indicators. However, previous results from Visitor Exit Surveys (VES) indicate that accommodations account for a significant portion of the money spent by tourists in the destinations. Available data suggest that the average length of stay in the region moved slightly from 7.2 nights in 2013 to an estimated 7.3 nights in 2014 and average daily expenditure expanded moderately. Noting also that the room revenues increased (*refer to Table 3.1*) and arrivals also went up (*refer to Tables 2.1.2 and 2.2.1*), expenditure will surpassed the 2013 level of US$28.1 billion to reach an estimated at US$29.5 billion, a 5.0% rise.

6. Outlook and Conclusion

Globally, the cost fuel declined significantly in the last quarter of 2014 and is expected to decline further in 2015, which should eventually reduce the cost of travel leading to an increase the demand for travel. This is further supported by increasing economic activity in North America and U.K., though tempered by anaemic economic growth in rest of Europe. Additionally, many destinations have negotiated additional new routes with the airlines to increase seat capacity during the year, which should lead to higher demand for Caribbean vacations. At the same time, hotel brands, such as Sandals and Baha Mar, are making substantial investments bringing new rooms to the market, indicating rising confidence in the industry. Consequently, the outlook for tourist arrivals to the Caribbean is cautiously optimistic - a further 4%-5% increase in arrivals is expected. The downside risks of a potential Ebola outbreak in our main source markets and the current Chikungunya outbreak in the region reducing the demand for Caribbean vacations have all dissipated somewhat, due to significant reduction in the rate of infections in the last quarter of 2014. However, the risk of the threat of ISIS, disrupting international air travel, remains small but persistent. As it relates to cruise passenger arrival numbers, the outlook is less optimistic. While the Caribbean will remain the number one cruise destination worldwide, it is expected to see a small decline in capacity as ships are again being repositioned away from the region, according to *2015-2016 Cruise Industry News Annual Report*. For this reason, no significant growth in cruise passenger arrivals is expected this year. Of course the performance will vary from country to country.

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.

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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-Nov	62,353	2.2	-	-	-
Antigua & Barbuda *	Jan-Dec	249,316	2.5	Jan-Dec	522,342	-2.2
Aruba	Jan-Dec	1,072,082	9.5	Jan-Nov	584,728	-1.3
Bahamas P	Jan-Jul	924,898	3.5	Jan-Oct	3,867,574	2.9
Barbados P	Jan-Nov	458,510	0.2	Jan-Nov	479,659	-2.3
Belize P	Jan-Dec	321,217	9.2	Jan-Dec	968,131	42.9
Bermuda *	Jan-Nov	212,125	-5.2	Jan-Nov	358,640	5.7
British Virgin Islands	Jan-Nov	337,843	3.0	Jan-Nov	301,884	1.4
Cayman Islands	Jan-Dec	382,816	10.8	Jan-Dec	1,609,555	17.0
Cozumel (Mexico)	-	-	-	Jan-Dec	3,404,858	23.8
Cuba	Jan-Dec	3,001,958	5.3	-	-	-
Curacao	Jan-Dec	450,953	2.5	Jan-Dec	629,145	6.8
Dominica P	Jan-Dec	81,159	3.7	Jan-Dec	286,573	24.3
Dominican Republic *	Jan-Dec	5,141,377	9.6	Jan-Sep	317,365	11.1
Grenada P	Jan-Dec	133,521	18.4	Jan-Dec	235,140	19.2
Haiti	Jan-Dec	465,174	10.8	Jan-Dec	662,403	2.9
Jamaica	Jan-Dec	2,080,181	3.6	Jan-Sep	1,423,797	12.5
Martinique	Jan-Dec	489,561	0.0	Jan-Dec	177,786	71.3
Montserrat	Jan-Oct	6,293	13.5	-	-	-
Puerto Rico **	Jan-Oct	1,405,390	6.6	Jan-Nov	1,154,078	13.6
Saint Lucia	Jan-Dec	338,158	6.1	Jan-Dec	641,452	8.0
St. Kitts & Nevis ^	Jan-Aug	74,317	3.1	Jan-Aug	434,106	16.9
St. Maarten *	Jan-Sep	377,341	7.3	Jan-Oct	1,543,572	15.9
St. Vincent & the G'dines	Jan-Nov	61,684	-1.2	Jan-Nov	69,481	6.3
Suriname	Jan-Jul	140,878	1.4	-	-	-
Trinidad & Tobago ***	Jan-Dec	412,537	-	Jan-Dec	42,820	30.1
Turks & Caicos Islands	Jan-Nov	368,164	40.6	Jan-Dec	971,838	24.8
U S Virgin Islands	Jan-Nov	655,477	3.9	Jan-Dec	2,083,890	4.3

** 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 February 11, 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-Nov	39,448	-0.7	3,310	3.4	7,014	6.8	12,581	9.2	62,353	2.2
Antigua & Barbuda *	Jan-Dec	95,332	7.6	27,701	-8.4	91,277	3.3	35,006	-2.8	249,316	2.5
Aruba	Jan-Dec	576,783	3.7	43,767	-1.3	80,155	4.1	371,377	23.1	1,072,082	9.5
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-Nov	104,050	-4.1	56,037	-6.1	203,712	9.3	94,711	-8.0	458,510	0.2
Belize [P]	Jan-Dec	199,321	8.6	26,397	-1.2	38,904	20.8	56,595	9.3	321,217	9.2
Bermuda	Jan-Mar	19,650	-1.7	6,268	-0.1	3,752	-4.5	1,279	15.4	30,949	-1.1
Cayman Islands	Jan-Dec	287,969	8.5	24,908	5.4	36,405	30.9	33,534	17.7	382,816	10.8
Cuba [1]	Jan-Dec	-	-	1,174,972	6.3	730,304	7.3	1,096,682	3.0	3,001,958	5.3
Curacao	Jan-Dec	52,942	-13.9	12,406	29.7	185,446	5.8	200,159	3.3	450,953	2.5
Dominica [P]	Jan-Oct	17,014	8.3	2,507	-0.4	12,135	12.8	37,135	-0.6	68,791	3.7
Dominican Republic *	Jan-Dec	1,784,486	12.4	706,394	3.3	1,183,784	4.9	1,466,713	13.7	5,141,377	9.6
Grenada [P]	Jan-Dec	35,313	20.6	13,270	46.8	31,292	21.5	53,645	10.1	133,521	18.4
Haiti	Jan-Nov	317,371	-	32,606	-	36,703	-	31,498	-	418,178	-
Jamaica	Jan-Dec	1,296,457	2.0	419,898	5.2	261,081	10.7	102,745	0.7	2,080,181	3.6
Montserrat	Jan-Oct	1,465	11.2	479	20.1	1,620	-7.0	2,729	30.8	6,293	13.5
Puerto Rico **	Jan-Oct	1,282,152	2.0	17,071	-3.7	29,507	14.1	76,660	4.5	1,405,390	6.6
Saint Lucia	Jan-Dec	142,746	11.2	41,502	15.3	93,610	5.8	60,300	-8.4	338,158	6.1
St. Kitts & Nevis ^	Jan-Aug	46,798	-3.0	5,862	26.9	7,315	12.7	14,342	12.6	74,317	3.1
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-Nov	17,113	-0.9	5,981	-1.7	17,928	1.6	20,662	-3.7	61,684	-1.2
Suriname	Jan-Jul	4,569	9.2	936	-12.1	63,930	10.7	71,443	-5.9	140,878	1.4
Trinidad & Tobago ***	Jan-Dec	158,501	-	54,877	-	79,839	-	119,320	-	412,537	-
Turks & Caicos Islands	Jan-Nov	297,309	-	38,767	-	8,475	-	23,613	-	368,164	-

** 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 February 11, 2015

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

Country	PERIOD	EUROPE		UNITED KINGDOM		FRANCE		GERMANY		ITALY		THE NETHERLANDS		SWEDEN		SPAIN		OTHER	
		2014	% CH	2014	% CH	2014	% CH	2014	% CH	2014	% CH	2014	% CH	2014	% CH	2014	% CH	2014	% CH
Anguilla	Jan-Nov	7,014	6.8	2,400	-2.0	.	.	752	123.8	951	8.9	.	.	.	.	.	.	2,911	0.0
Antigua & Barbuda*	Jan-Dec	91,277	3.4	71,193	3.4	2,166	25.1	2,665	9.1	7,976	0.4	299	2.7	751	7.1	638	17.7	5,589	-4.2
Aruba	Jan-Dec	80,155	4.1	10,447	12.2	.	.	4,362	13.6	7,099	41.8	36,995	-2.1	6,742	-5.2	1,734	11.3	12,776	3.1
Barbados [P]	Jan-Nov	203,712	9.3	165,546	9.1	.	.	10,172	16.9	.	.	.	.	.	.	.	.	27,994	8.0
Belize [P]	Jan-Dec	38,904	20.8	11,355	24.1	4,130	34.5	5,066	27.9	2,552	50.6	2,582	2.5	1,487	36.0	1,599	15.0	10,133	8.8
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-Dec	36,405	30.9	14,910	4.6	.	.	.	.	.	.	.	.	.	.	.	.	21,495	58.5
Cuba	Jan-Dec	730,304	7.3	123,907	-17.5	101,060	4.6	139,123	20.6	112,001	17.2	33,488	4.1	12,795	292.5	77,086	5.5	130,844	14.2
Curacao	Jan-Dec	185,446	5.8	2,495	4.6	2,311	-12.6	19,005	8.3	1,128	-13.1	140,154	6.4	2,387	25.6	762	-43.4	17,204	5.2
Dom Republic *	Jan-Dec	1,183,784	4.9	126,563	16.9	229,678	-1.3	230,733	7.7	82,010	2.4	32,498	-3.3	13,828	28.5	150,859	6.1	317,615	3.5
Dominica [P]	Jan-Oct	12,135	12.8	4,195	7.3	4,314	18.1	1,221	9.2	133	23.1	271	79.5	291	41.3	92	16.5	1,618	5.4
Grenada [P]	Jan-Dec	31,292	21.5	23,361	14.1	1,094	-27.1	1,914	166.9	556	120.6	.	.	579	160.8	.	.	3,788	46.8
Jamaica	Jan-Dec	261,081	10.7	177,216	17.1	10,100	-18.5	21,346	8.6	8,692	11.3	6,040	9.5	7,622	136.9	2,537	-1.2	27,498	-17.5
Montserrat	Jan-Oct	1,620	-7.0	1,401	-1.2	.	.	.	.	.	.	.	.	.	.	.	.	219	-32.4
Puerto Rico **	Jan-Oct	29,507	14.1	4,288	21.2	2,602	30.2	4,057	5.2	1,712	13.2	1,151	17.7	667	-15.4	4,263	36.9	10,767	6.8
Saint Lucia	Jan-Dec	93,610	5.8	73,960	4.4	6,032	10.4	3,622	9.2	.	.	.	.	.	.	.	.	9,996	13.0
St Kitts And Nevis^	Jan-Aug	7,315	12.7	5,815	8.3	207	4.5	209	32.3	130	78.1	95	35.7	79	27.4	70	9.4	710	43.1
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-Nov	17,925	1.6	13,951	5.0	695	-15.0	662	-4.1	522	-21.6	96	-24.4	315	-5.4	113	-8.9	1,574	-1.4
Suriname	Jan-Jul	63,930	10.7	679	23.0	6,783	60.6	362	-7.7	581	123.5	52,966	5.9	54	-26.0	128	23.1	2,377	10.7

** 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 February 11, 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

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