

2015 CARIBBEAN TOURISM QUALITY INDEX

— RESONANCE REPORT





ABOUT RESONANCE

Resonance Consultancy Ltd. creates marketing strategies, development plans, and tourism brands that shape the future of destinations and developments around the world.

Our team has advised destinations, communities, cities and governments in more than 15 states and 70 countries. We provide leading public and private sector organizations with visioning, trend forecasting, marketing strategy, stakeholder engagement, economic development strategy, and tourism policy to help realize the full potential of communities.

From Bucharest to Brasilia, Hawai'i to Haiti, we have helped clients understand consumer trends, influence policy, engage their communities, plan for the future, and market their unique destination.

Our future-focused visions, reports and strategies help our clients find their way forward, provide plans for action, and give officials, investors and the public reasons to believe.

The principals of Resonance have more than a half-century of development and tourism experience, and have completed more than 100 visioning, strategy, planning, policy and branding projects for destinations and communities around the world. Together, we've created an integrated process that helps both public and private sector clients look ahead – ahead of the curve, around the corner or a decade from now.

To learn more about Resonance Consultancy and our services, please visit:

www.resonanceco.com



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INTRODUCTION





THE CARIBBEAN IS A REGION AS COMPLEX AS IT IS COMPELLING, AND AS VARIED AS ITS COLLECTION OF MORE THAN TWO DOZEN COUNTRIES, 59 LANGUAGES, A PALIMPSEST OF HISTORICAL INFLUENCES AND MORE THAN 7,000 ISLANDS CAN POSSIBLY MAKE IT.

It is also, as every tourism official acutely knows, a region in the throes of profound change, and every island is feeling the effects. In the most tourism-intensive region in the world – according to the World Travel & Tourism Council (WTTC) – tourism is also forecast to grow GDP at only 3.4% annually over the next 10 years, placing the Caribbean 10th of 12 world regions. A similar forecast is expected for travel & tourism investment, with 9 world regions of 12 growing their investment at a higher rate.

In the face of nimble traditional competitors, and emerging new places called paradise, these are unsettling statistics. The region is reacting in different ways: some are reaching farther than ever to entice new markets, drawing increasing numbers of Russians and Europeans, and hungrily eyeing China. For other players in the region, the Caribbean need just look north for its biggest opportunities. In his keynote address at the Caribbean Tourism Organization's (CTO) State of the Industry Conference (SOTIC) in St. Thomas this fall, Apple Leisure Group CEO Alex Zozaya told the assembled that the market of 300 million in North America has created only 12 million tourists a year for the region. "I don't see why we can't attract 30 million tourists a year," he said. "The biggest competitor is the number of Americans who have never traveled beyond the borders of their own country."



For some observers of the Caribbean scene, the search for new, exotic markets underscores the urgency for the region to act together, a chronic Caribbean challenge. Speaking at the recent Caribbean Tourism Summit and Outlook Seminar in Montego Bay, Jamaica, David Scowsill, the head of the WTTC, said that to fully tap into the potential of travel and tourism, Caribbean nations need to speak with one voice, a sentiment that has been echoed repeatedly over the years. Yet One Sea, One Voice, One Caribbean is elusive, even though success in faraway markets will certainly depend on it. Sir Ronald Saunders told the Huntington News that the preparatory work to attract the complex Chinese market needs to be undertaken by a group acting on the region's behalf.

Other key areas demand regional attention: Policy issues, from layers of bureaucracy to inefficient airlift challenges, tax burdens, ferry service and more are old complaints in the region. Increasingly, sustainability concerns – related to everything from high energy costs to climate change to the importance of bringing the next generation into the hospitality industry – are adding critical new challenges that demand a coordinated response. Untreated, they'll continue to undermine efforts to grow the industry that's critical to all.



Wherever visitors come from, be it Russia, Germany, China, London, Mexico or Miami, travelers are increasingly looking for both the sun and sand that have been the traditional appeals of Caribbean tourism, and they're also looking for a tangible, enviable, memorable moment that ties them to the place. This experience-seeking traveler is going ever farther afield in an ever-smaller world in the search for the exceptional and the unforgettable. See our Key Trends Takeaway on Page 09.

At the SOTIC in 2013, that point was underlined. Hugh Riley, the Caribbean Tourism Organization's (CTO) secretary general said, "It is the quality of the experience that will determine if our guests develop such an emotional attachment that they become influencers and repeat visitors. The whole Caribbean will enhance its competitive advantage by providing unique and memorable experiences to our visitors." For Alex Zozaya of Apple Leisure Group, "Unique experiences make people more likely to come back to a place. It also lengthens their stay. And when they return home, they'll talk with their friends about the things they did."





INCREASINGLY, OF COURSE, THEY TALK TO THEIR FRIENDS ON SOCIAL MEDIA, WHICH IS NOW INFLUENCING CHOICES FAR BEYOND WHAT ANYONE COULD HAVE IMAGINED EVEN FIVE YEARS AGO. THAT'S THE REASON RESONANCE CHOSE TO FOCUS ON DATA FROM SOCIAL MEDIA FOR THIS CARIBBEAN TOURISM QUALITY INDEX – AND ALSO WHY DESTINATIONS ARE INCREASINGLY DOING THE SAME.

Former CTO Secretary General Vincent Vanderpool-Wallace, a former tourism minister of the Bahamas, told SOTIC in 2013 that, “It is so much easier today and getting easier every day to share one’s impression of a destination, hotel or other travel experiences via social media. These ubiquitous digital impressions are so powerful that they have been described as permanently archived word of mouth,” he said. “Instead of focusing only on ‘managing social media,’ people who understand the power of those impressions begin to focus far more on delivering a better experience for their customers.”

Part of delivering a better experience comes with constant evaluation of the experience from start to finish. Hugh Riley says that, “By introducing a program that enhances and measures the entire visitor experience, from hotels to food to infrastructure, we can improve the product, share best practices, lift service standards, attract more tourists, and continue to thrive for years to come.”

The other critical aspect of better experiences is creating more of them, and many destinations have understood that they need to develop new tourism product. John Murphy of efm, an important hospitality consultant in the region, says, “The discerning customers that travel now are not going to accept second-rate experiences. We’re being compared to a lot of new destinations like Dubai...So we need to keep upgrading our product.”





The focus on product is even leading some destination marketing organizations (DMOs) around the world to restructure. In the Caribbean, the Aruba Tourism Authority has updated its DMO business plans to incorporate functions of destination management into the organization’s operations and budgets, adding the second ‘M’ to their moniker and embarking on the important evolution from Destination Marketing Organization to DMMO – Destination Marketing and Management Organization. DMMOs do more than push the destination out to the world; they’re influential in determining product development and increasingly

responsible for the guest experience. Elsewhere in the region, Barbados has addressed the development challenge by splitting itself into two distinct entities – one for marketing and the other for product development.

Resonance’s work in many countries in the world has shown us that destination management is increasingly the future for the industry. President Chris Fair says, “Better integration between product marketing and product development can help destination marketing organizations gain the control of the overall visitor experience they need to ensure that the destination is firing on all cylinders for visitors.”

Some Caribbean destinations are taking first steps toward coherent planning with a long-term view. Anguilla, Barbados, Curaçao, Dominica and Jamaica have embarked on Destination Development Plans or Tourism Master Plans to set out their policies, strategies and operations to develop, refresh and rejuvenate their tourism infrastructure, services and products.

The findings in this report indicate that the products and experiences that destinations need to create – ones that, in turn, visitors will want to share – need to reflect and tell a unique story of the character of each island, rewarding travelers with one-of-a-kind adventures, whether that’s exploring an UNESCO Heritage site, discovering a new culinary treasure, or finding an underwater wonderland.

Zozaya told SOTIC this fall that, “The Caribbean needs to step out of its comfort zone, be pragmatic and run tourism like a business. It cannot afford the levels of bureaucracy that now exist. Put the political agendas aside, and you will move faster,” he said.

With an attentive ear to what visitors are telling destinations, and the right kind of strategic response, destinations may even be able to move at the speed of social media.



RESONANCE CONSTANTLY MONITORS TRENDS IN TOURISM TO HELP OUR TEAM AND OUR CLIENTS UNDERSTAND THE FUTURE OF THE WORLD'S LARGEST INDUSTRY AND THE CHALLENGES AND OPPORTUNITIES IT REPRESENTS. MORE THAN 25,000 INDUSTRY FOLLOWERS HAVE VIEWED OUR REPORT ON GLOBAL TOURISM TRENDS, WHICH IS AVAILABLE ON SLIDESHARE AT: [RESONANCECO.COM/TRENDS.HTML](https://resonanceco.com/trends.html)

What follows is a combination of our understanding of the larger forces shaping tourism and our observations about emerging tourism trends in the Caribbean based on the results of this report. The trends have been created with an eye towards suggesting the opportunities they represent for tourism in the region.

THE IMPORTANCE OF EXPERIENCE 1: TO BEACH OR NOT TO BEACH

The trend worldwide, and the findings of this report, point to the essential importance of experiences for visitors of every demographic – we live in a post-recession era where experience trumps old-school consumption. The definition of experience is broad – it can range from visitors who stay aboard their ships and all-inclusive fans who barely dip their toes into an authentic island experience to others who are avid explorers of local life in all its manifestations. One thing is clear from the findings of this report: While beaches are as well-appreciated as they ever have been, they're no longer the only experience that visitors seek. Today, guests are looking for and sharing their experiences in, over, under and sometimes far from the cerulean waters that were once the sole focus of Caribbean tourism.

THE IMPORTANCE OF EXPERIENCE 2: BOLDLY BIG. PROUDLY BOUTIQUE.

There are appealing contrasts in the development strategies of the Caribbean region – from countries like the Dominican Republic, which embrace and create infrastructure that attracts every form of tourism, to destinations like Anguilla that have no all-inclusive resorts and target specific niches of travelers. The choices islands make to differentiate themselves are key to helping consumers understand the destination and to guiding development authorities in the creation of appropriate tourism product.

THE IMPORTANCE OF EXPERIENCE 3: ROCKING THE (CRUISE) BOAT

Cruise companies have been taking increasing control of the customer experience on the islands by building docks big enough to accommodate massive vessels and leased environments that incorporate food, culture and craft experiences. Beach days for cruise passengers, while always



popular, are becoming increasingly sophisticated. This multiplicity of experiences satisfies the trend toward multi-generational travel, providing attractions for family members of several different ages and desires. Carnival has been investing in Puerta Maya at Cozumel; Grand Turk in the Turks & Caicos, south of the Bahamas; Mahogany Bay on the island of Roatan in Honduras; and now, at \$65 million, Amber Cove Cruise Center on the Bay of Maimon near Puerto Plata on the north coast of the Dominican Republic.

THE IMPORTANCE OF EXPERIENCE 4: THE PRIDE AND PARTIES OF HISTORY

As a region, the Caribbean has more than a dozen UNESCO Heritage sites, a remarkable concentration of historic and colonial riches. Old San Juan and Old Havana ranked near the top of all experiences, and other islands blessed with historical treasures have an opportunity to further leverage their charms to draw travelers into the color and texture and flavor of their past. Likewise, the excitement of Carnival throughout the islands ties the region together and offers revelers reasons to reach beyond their own destinations to be part of the party in other regions.

THE IMPORTANCE OF EXPERIENCE 5: CREATIVITY IS THE SPICE OF ISLAND LIFE

Creative tourism is defined as tourism that allows visitors to learn in a hands-on fashion; for these visitors, participation is a key part of the pleasure of the experience. The islands' bred-in-the-bone creativity in arts, music and food provides multiple opportunities to increase the range of activities offered in a given destination, as well as to create experiences unique to them. Culinary tourism has emerged as a major trend around the world, with destinations from Norway to Chile, Cambodia to Hawai'i investing in the creation of innovative food experiences. The Caribbean contains an enormous variety of authentic flavors, and travelers have responded to them through enthusiastic rankings and participation in food events and festivals, as well as food sourcing and preparation experiences. Likewise, just as the newly popular category of 'craft' spirits such as bourbon have earned knowledgeable and enthusiastic followers stateside, so rum, the spirit of the islands, is well positioned to continue to leverage visitor interest in the creation and the consumption of this authentic island libation.

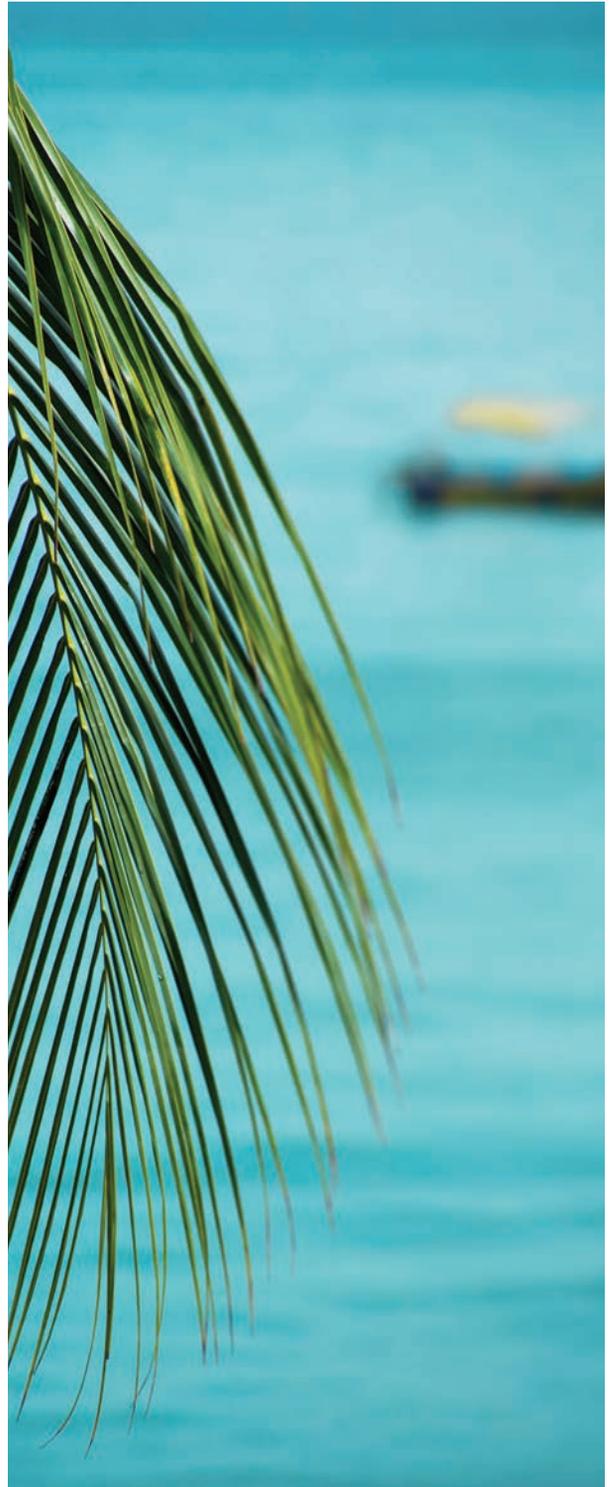


SAFETY AND SUSTAINABILITY

There's trouble in paradise when one destination is within one shooting of losing all its cruise lines, and other safety rankings in the report are significant red flags. At the same time, the region is feeling other pressures: the ravages of climate change are being felt with every unusually powerful hurricane, the cost of energy places ever more pressure on scarce island resources, and coral reefs, a true Caribbean treasure, are threatened with every channel dredged for ever-larger ships.

THE IMPROBABLE BECOMES POSSIBLE: CUBA AND HAITI RISING

Cuba is the elephant in the bright turquoise room of the Caribbean as travel there begins, ever so slowly, to become possible for American citizens. While the island is already a major destination for many of the world's travelers, the dawn of less restricted travel to Cuba by Americans could profoundly change the dynamic of tourism in the region. Meanwhile, in beleaguered, resilient Haiti, the dynamic Minister of Tourism Stéphanie Villedrouin Balmir, who has resurrected the portfolio with a fierce determination, has taken the idea of Haitian tourism from laughable to possible. In fact, the CTO reports that Haiti's visitor numbers increased more than 20% in 2013, the second-highest increase of any destination in the region. In August 2014, Carnival Corporation announced that it had signed a memorandum of understanding to develop a \$70 million destination cruise project in Tortuga (Ile de la Tortue), an island off Haiti's northern coast – the largest cruise industry investment ever made in Haiti.





EXAMINING THE RANKINGS



THE WAY VISITORS EXPERIENCE THE CARIBBEAN, AS WELL AS THE WAY THEY SHARE THOSE EXPERIENCES WITH FRIENDS, FAMILIES AND FOLLOWERS, HAS UNDERGONE A PROFOUND SHIFT. FROM A RESEARCH PERSPECTIVE, THIS SHEDS A WHOLE NEW LIGHT ON THE ELEMENTS AND EXPERIENCES THAT ARE IMPORTANT TO POTENTIAL VISITORS.

Resonance Consultancy has undertaken Destination Assessments and Tourism Development Plans for a wide range of places, and we've learned that traditional measures of success – numbers of visitors and the spending they generate – don't tell destination marketing and/or management organizations the whole story.

That's why this research offers a new lens – one that's firmly focused on the less-considered supply side of tourism for the countries in the Caribbean region. Visitors themselves are increasingly influencing tourism through their experiences and evaluations of destinations, including comments, images and reviews offered to family, friends, and associates, as well as to strangers researching the destination. Although business travel in the region is on the rise, this study focuses on leisure aspects of travel. This ranking of destinations from the supply side is designed to help destinations understand, evaluate and manage this key

aspect of their offering – the products, programming and experiences that resonate with consumers today.

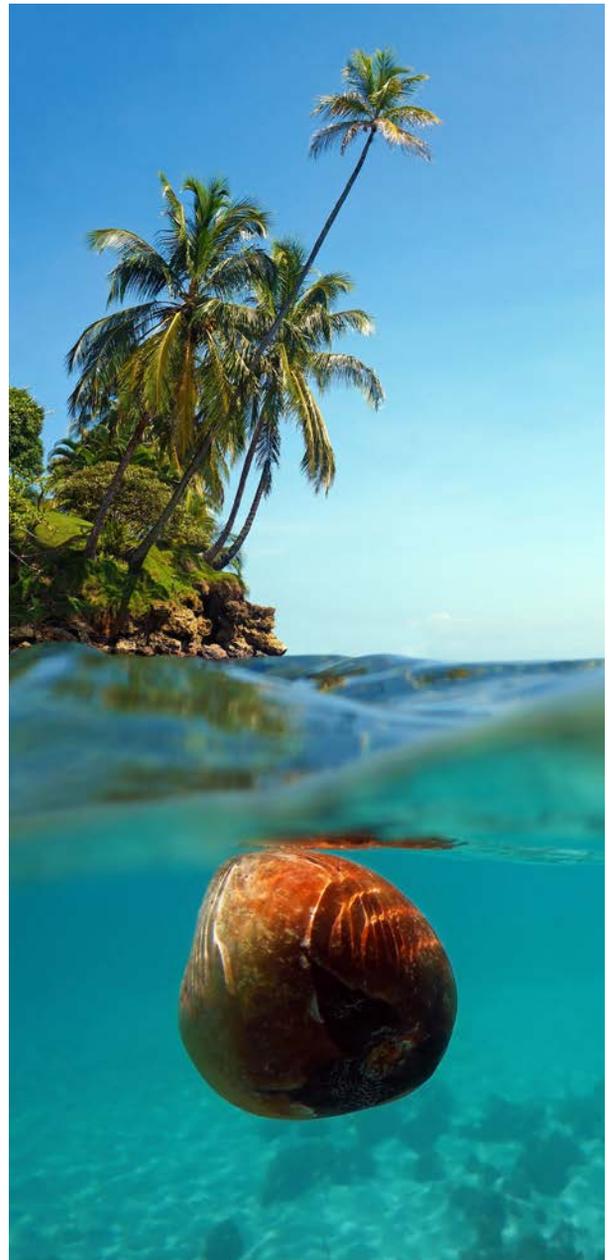
We drew from a wide range of sources, including some of the world's most influential travel review sites, and chose key criteria that influence demand for leisure travelers. Twelve factors were considered: outdoor activities and parks, attractions and amusements, food experience, museums and fine arts, culture and performing arts, shopping, places to eat and drink, and nightlife. In our analysis of thousands of traveler reviews, we considered only entries rated as very good or excellent in order to ensure that the rankings spoke not just to the quantity of products on offer, but also the quantity of quality experiences as rated by visitors themselves. A separate source was used to include crime rate statistics. Only destinations with 100,000 or more visitors per year have been analyzed for this report.

ABSOLUTE RANKINGS. INDEXED RANKINGS.

We considered our data results two ways: we created an Absolute Ranking, which relates the total number of high quality experiences on an island according to visitors; and we also produced an Indexed Ranking, which rates results according to the destinations' total visitor count. This ranking shows which destinations are providing more quality experiences per visitor, and so creates a level playing field between destinations that are large in size and volume and those that are smaller in size and volume.



We think the results of the Caribbean Tourism Quality Index are telling. They allow tourism organizations – be they DMOs or DMMOs – to understand what their consumers (visitors) are saying about their product and services, how they consider the destination and how it stacks up to the competition. They offer DMOs a new kind of snapshot of their destinations, showing both areas where they are performing well and those in which they need to improve based on benchmarking with their competitive set from both an infrastructure and experiential perspective, and factoring in the opinions of the people who really count – the visitors.



We trust you'll find the report an important first step to creating meaningful tourism development strategies and plans for your destinations in our exciting and endlessly-evolving industry.



ABSOLUTE RANKING

The following table is the 2014 ranking of Caribbean destinations with the greatest number of quality tourism products and experiences as evaluated by past visitors:

01	Dominican Republic	15	Trinidad & Tobago
02	Puerto Rico	16	Curacao
03	Cuba	17	Turks & Caicos Islands
04	Jamaica	18	Saint Maarten
05	Bahamas	19	British Virgin Islands
06	Barbados	20	Grenada
07	U.S. Virgin Islands	21	Saint Kitts & Nevis
08	Aruba	22	Saint Martin
09	Saint Lucia	23	Saint Vincent & The Grenedines
10	Martinique	24	Haiti
11	Cayman Island	25	Bonaire
12	Guadeloupe	26	Anguilla
13	Bermuda	27	Saint Barthelemy
14	Antigua & Barbuda	28	Dominica

As one might expect, the largest Caribbean destinations (Dominican Republic, Puerto Rico, Cuba, Jamaica and the Bahamas) tend to rank highest in the total number of quality products and services as a function of their physical size and high volumes of

visitors, which can often translate into a significant number of consumer reviews.

Taking a closer look at the details illustrates how these destinations did in each category.



Overall Ranking	Country												
		Hotels	Outdoors	Amusements	Food Experiences	Museums	Performances	Culture & Landmarks	Nightlife	Restaurants	Shopping	Crime	Flights
01	Dominican Republic	1	2	3	5	3	2	3	2	2	6	18	1
02	Puerto Rico	5	1	3	2	2	3	2	4	1	3	20	4
03	Cuba	4	8	10	14	1	1	1	1	3	9	3	3
04	Jamaica	2	5	1	1	6	3	4	5	4	9	25	2
05	Bahamas	3	3	6	4	5	5	6	3	5	7	22	5
06	Barbados	6	7	7	2	12	7	8	7	9	1	6	8
07	U.s. Virgin Islands	17	6	2	6	8	9	5	6	6	2	24	14
08	Aruba	11	10	9	14	13	7	16	8	7	5	2	6
09	Saint Lucia	8	9	5	6	13	14	12	15	17	14	17	11
10	Cayman Islands	22	4	23	10	10	9	10	22	12	7	14	9
11	Martinique	17	16	18	10	6	9	12	22	10	14	1	17
12	Guadeloupe	10	11	14	6	10	14	24	20	8	12	9	16
13	Bermuda	21	12	17	14	4	14	7	12	15	11	8	20
14	Antigua & Barbuda	9	17	7	14	13	14	22	16	16	12	11	15
15	Trinidad & Tobago	22	14	18	6	13	5	11	12	14	25	21	9
16	Curacao	24	15	14	12	8	14	14	10	19	20	13	13
17	Turks & Caicos Islands	7	13	12	14	25	14	19	19	20	14	4	20
18	Saint Maarten	25	23	11	14	18	14	19	9	13	4	26	7
19	British Virgin Islands	14	20	21	14	18	9	22	10	18	19	5	20
20	Grenada	11	23	14	12	18	9	17	22	21	18	12	20
21	Saint Kitts & Nevis	28	20	13	14	13	14	9	12	22	22	23	18
22	Saint Martin	16	25	24	24	25	14	17	16	11	14	16	20
23	Haiti	13	28	28	14	18	14	21	27	27	25	10	12
24	Saint Vincent & The Grenadines	14	22	27	24	18	14	14	16	24	25	19	20
25	Bonaire	26	18	20	14	18	14	25	22	24	22	28	19
26	Anguilla	20	26	25	24	25	14	26	20	23	21	7	20
27	Saint Barthelemy	17	27	26	24	18	14	26	22	26	22	27	20
26	Dominica	26	19	21	24	25	14	26	27	28	28	15	20



INDEXED RANKING

The following table is the 2014 ranking of Caribbean destinations with the most quality tourism products and experiences per visitor (indexed against each destination's visitor count):

01 Turks & Caicos Islands	15 Guadeloupe
02 Barbados	16 Aruba
03 Trinidad & Tobago	17 Antigua & Barbuda
04 Martinique	18 Dominican Republic
05 Anguilla	19 Puerto Rico
06 Bermuda	20 U.S. Virgin Islands
07 Saint Kitts & Nevis	21 Saint Martin
08 Saint Vincent & The Grenadines	22 Cayman Islands
09 Grenada	23 British Virgin Islands
10 Cuba	24 Bahamas
11 Bonaire	25 Saint Barthelemy
12 Saint Lucia	26 Saint Martin
13 Curaçao	27 Haiti
14 Jamaica	28 Dominica

Having leveled the playing field between smaller and larger destinations by adjusting for visitor counts, the above table of rankings illustrates those Caribbean destinations with more quality products and services

per visitor. Turks & Caicos tops the list, followed by Barbados, Trinidad & Tobago, Martinique and Anguilla.

Taking a closer look at the details illustrates how these destinations did in each category.



Overall Ranking	Country												
		Hotels	Outdoors	Amusements	Food Experiences	Museums	Performances	Culture & Landmarks	Nightlife	Restaurants	Shopping	Crime	Flights
01	Turks & Caicos Islands	5	1	1	7	16	14	5	7	2	2	19	20
02	Barbados	9	15	13	2	17	6	10	6	15	1	7	9
03	Trinidad & Tobago	22	4	10	1	10	1	6	5	6	26	23	1
04	Martinique	23	8	12	3	3	4	7	25	4	9	3	14
05	Anguilla	2	5	3	24	6	14	12	4	1	3	24	20
06	Bermuda	13	6	11	12	1	14	4	8	12	6	12	20
07	Saint Kitts & Nevis	11	7	2	10	5	14	2	3	11	20	25	11
08	Saint Vincent & The Grenadines	1	2	14	24	4	14	1	1	3	22	26	20
09	Grenada	3	11	8	5	13	3	8	24	13	8	20	20
10	Cuba	24	25	25	23	2	2	3	2	9	23	1	3
11	Bonaire	4	3	5	8	9	14	15	21	10	16	28	12
12	Saint Lucia	10	13	4	6	18	14	14	16	22	14	18	8
13	Curacao	21	12	15	11	7	14	11	9	19	21	16	6
14	Jamaica	12	22	6	9	20	5	17	14	21	24	14	2
15	Guadeloupe	20	9	18	4	12	14	24	23	5	12	10	16
16	Aruba	26	17	17	21	25	7	19	10	14	5	2	5
17	Antigua & Barbuda	8	16	7	16	15	14	22	18	18	11	15	10
18	Dominican Republic	19	18	20	20	14	8	18	12	17	17	4	4
19	Puerto Rico	28	20	22	15	8	10	9	20	8	15	5	17
20	U.s. Virgin Islands	27	21	9	14	22	13	16	15	23	4	13	19
21	Saint Martin	7	26	19	24	27	14	13	13	7	10	21	20
22	Cayman Islands	18	10	27	13	19	12	21	26	24	13	8	15
23	British Virgin Islands	15	19	23	17	21	9	23	11	20	19	9	20
24	Bahamas	14	24	26	18	23	11	26	19	26	25	6	18
25	Saint Barthelemy	16	23	21	24	11	14	25	22	16	18	27	20
26	Saint Martin	25	27	24	22	28	14	27	17	27	7	17	13
27	Haiti	17	28	28	19	24	14	20	27	28	27	11	7



INSIGHTS INTO THE TOP 5S



ABSOLUTE RANKING TOP 5

We have examined the top five destinations in the Absolute Ranking and the top five in the Indexed Ranking to better understand why they've ranked highly – what they're doing on the supply side that appeals to visitors.

01 Dominican Republic

02 Puerto Rico

03 Cuba

04 Jamaica

05 Bahamas



1. DOMINICAN REPUBLIC

The Dominican Republic has reached out to the world as a destination. And the world is coming – in droves.

The Dominican Republic is the most popular destination in the Caribbean, with nearly triple the growth of the rest of the region between 2012 and 2013. Last year, the country welcomed 4.7 million visitors, a 3.6% increase over 2012. D.R. Tourism Minister Francisco Javier Garcia estimated to Travel Weekly that 2014 will see a total increase of 8%, and by the end of the decade, they'd like to see that number more than double, to 10 million.

According to the World Tourism Organization, the Dominican Republic ranks #12 of 154 countries in terms of government's investment in tourism infrastructure. In 2012, the Ministry of Tourism budget was increased by \$2.5 billion Dominican (approximately \$61 million USD), to help realize the vision of attracting 10 million tourists within a decade.

To make that happen, the Ministry of Tourism is spending more than \$45 million annually to promote the country internationally; it also has 22 Tourism Promotion offices around the world. The strategy is paying off: The U.S. is the main market for arrivals to the D.R., and sent 1.6 million visitors in 2013, a 9% increase over 2012. Canada comes in second, contributing 685,000 visitors. Combined, North America generates 56% of all arrivals to the D.R.

Other markets are increasing, though. Germans, for example, arrived in 2013 at numbers 16% higher than the year before. And the lucrative Russian market is discovering the D.R., to the tune of 172,000 in 2012. According to Euromonitor, the country's hospitality, combined with visibility from a promotion office in St. Petersburg and daily flights from Moscow, have helped move the Russians into a top five source market.



Euromonitor also reports that some tourism investment has gone towards infrastructure, and the country is making significant improvements in roads and highways connecting different regions. In addition, funds have gone towards developing the Puerto Plata tourist district and undertaking restoration and preservation in Santo Domingo's historic Colonial Zone. Other investments include overseas promotion of the destination, both to tourists and to investors, as well as conducting research into untapped source markets.

The Dominican Republic built its tourism industry on affordable, all-inclusive resorts, though accommodation offerings now span from budget chains to luxury five-star boutique hotels. The country has an inventory of more than 67,000 hotel rooms at a range of price points, and more are continually in the pipeline. Of these, visitors rated 237 hotels Very Good or Excellent, putting it far and away in the top spot. Last year, occupancy averaged 87.3%, and as visitor numbers increase, hotel development will need to keep pace.



Just this summer, both Hilton and Marriott opened their first properties in the Dominican Republic. Many developers appear to be taking advantage of the tax incentives for renovations, too, including Santo Domingo's historic 278-room El Embajador, an Occidental property. To encourage commercial real estate investors, the government has created numerous tax exemptions for companies developing tourism-related product.

Like most of the Caribbean, the D.R. is also a significant destination for cruise ships. On the northern coast, near Puerto Plata, a new \$65 million Carnival Cruise port, Amber Cove Cruise Port, is scheduled to open next year. It will accommodate two 4,000-passenger ships and while Carnival's vessels will have priority access, it will be open to all cruise lines. The 30 acres of facilities on shore will include a craft market, restaurants, a water attraction and a transportation center.

163 direct international flights come into the country's eight major airports, making the Dominican far and away the most accessible destination in the Caribbean. The busiest of these, Punta Cana International Airport (PUJ), which serves 98 cities in 36 countries via 58 airlines, is undergoing an expansion that includes a new terminal with 51 positions.





In the Outdoors category, the D.R. came in second to Puerto Rico, with 295 experiences ranging from soaring through the air in a paragliding class or riding horses along the surf's edge. The country features 250 miles of shoreline that surround thousands of square miles of soaring mountain ranges, historical urban centers, 16 national parks, winding rivers, hidden lagoons, lush tropical islands and nearly a thousand miles of diverse beach experiences. The D.R. is also gaining a reputation as a world-class golf destination, with more than two dozen courses, including the world-renowned Playa Grande in Rio San Juan and La Romana's classic Teeth of the Dog course.

Among the most compelling cultural attractions is the Colonial City, an UNESCO World Heritage site located in the country's capital, Santo Domingo – the oldest colonial settlement in the New World. Within the 11 walled blocks of this city-within-a-city, visitors can go back in time and explore the first cathedral and monastery ever built in the 'New World,' along with more than 300 historical sites, including monuments, forts and museums.

From sampling rums and smoking cigars in one of Santo Domingo's many nightclubs to climbing Pico Duarte, the highest peak in the Caribbean, the Dominican Republic offers such a wide variety of experiences that it truly does have something to appeal to nearly every visitor.



Photo: Flickr - Chris Ford



2. PUERTO RICO

With a boom in hotel construction and refurbishment, and the \$1.5 billion mixed-use development of Bahia Urbana in San Juan, Puerto Rico is building for a future where tourism contributes 10% to GDP.

The United States Commonwealth of Puerto Rico is an appealing destination for American visitors. English is widely spoken, no passport or currency exchange is required, the technical infrastructure is familiar – from banks to cell carriers to right-hand driving – and in the Caribbean context, it's a highly developed destination in the middle of a tropical paradise.

In 2013, Puerto Rico welcomed more than 1.5 million overnight visitors, a 1.2% increase from 2012. Between January and April of this year, 630,000 visitors arrived, marking a 4.8% increase over the same time period last year.

As the third-largest destination in the Caribbean, Puerto Rico has a government with the size and means to invest in tourism as an economic growth strategy. Tourism currently accounts for only 6% of the GDP, and officials would like to see that percentage rise to 10%.

At Luis Muñoz Marín International Airport, the Caribbean's busiest airport, \$1.4 billion in renovations are underway, while several regional airports are sharing a \$38 million allotment for upgrades.



Photo: Flickr - Ron Koetz



Among new direct flights added recently are Southwest (from Orlando and Tampa), Delta (Chicago and JFK) and JetBlue (Chicago, the 14th city the airline serves with direct flights to San Juan). Across the pond, Air Europa began flying direct to San Juan from Madrid earlier this year.

While Puerto Rico has the fifth-highest number of high-rated hotels in the Caribbean, that ranking becomes relatively low when analyzed based on visitor numbers – that is, given the number of visitors, there are very few high-quality properties from which to choose.

The past few years, though, have seen dozens of hotel and resort refurbishments, renovations and openings, including the \$342 million Dorado Beach (Ritz-Carlton Reserve), which includes the holistic Spa Botánico and an eco-education program; the Condado Vanderbilt; the historic Normandie, which is undergoing a \$40 million renovation, as well as negotiations with management companies; upgrades to the Caribe Hilton and the Condado Plaza Hilton, as well as the San Juan Marriott Resort & Stellaris Casino.

Hyatt House San Juan, the first Hyatt House in the Caribbean, will open this fall.

The biggest development – both in size, money and overall wow factor – is the \$1.5 billion, 87-acre Bahia Urbana mixed-use development along the San Juan waterfront. The first phase included a tree-lined promenade along the harbor, with seating areas for watching seaplanes take off and land, a giant seahorse sculpture (among others), pavilions and an open-air restaurant. The master plan includes market space for local artisans to sell their crafts, spots for dining and drink, 1,700 units of residential real estate (including rentals), 660 hotel rooms and an amphitheater, as well as abundant pedestrian paths and green space for walking, relaxing and recreation. And, because it's the Caribbean, an urban beach.

In addition to contemporary design, Puerto Rico features the oldest examples of European architecture in the United States. Nowhere is that more visible than in Old San Juan, which carries the dual designations of UNESCO World Heritage Site and UNESCO National



Historic Site. The 16th-century military forts – El Morro and San Cristobal – feature a heavy Spanish influence, with sloping tile roofs and heavy wooden doors that lead to secret gardens. Thanks to a variety of landscapes, from undeveloped stretches of coastline to protected islands, ecological reserves to inland forests and mountains,

The Commonwealth has far more Outdoors experiences than any other Caribbean destination. Visitors can explore the Guánica State Forest & Biosphere Reserve, watch a diverse array of birds in the salt flats of Cabo Rojo, explore the breathtaking artwork abundant in subterranean caves or wander through the fields at one of the only hydroelectric-powered coffee plantations in the world. It's not surprising that Puerto Rico is becoming an eco-tourism destination. This fall, the Puerto Rico Tourism Company won the Caribbean Tourism Organization/TravelMole award for Caribbean Excellence in Sustainable Tourism for their “excellence in planning and managing a diversified tourism product using sustainable tourism concepts.”



During the day, San Juan is a peaceful enclave of historic experiences, with shops, restaurants and museums. At night, the area transforms into a cultural magnet of vibrant nightlife.

Puerto Rico didn't just top our listings with exceptional restaurants – it ran away with it entirely. The Commonwealth has 1,390 rated Very Good or Excellent, nearly twice the number of the nearest competitor. While many restaurants feature concina criolla, Puerto Rico's unique combination of Arawak, Taino, Spanish, African and North American cuisine, others cater to just about every craving a visitor might have – Spanish, Turkish, Argentinian, Tunisian and more. And for the epicure, there's the acclaimed (and Condé Nast Traveler-endorsed) Marmalade Restaurant & Wine Bar and Oceano.



3. CUBA

A forbidden land to most Americans, Cuba is one of the Caribbean's top destinations for the rest of the world. And now a crack in the wall between the U.S. and Cuba is showing just how enormous unrestricted travel could be.

The island of Cuba anchors the country's archipelago of more than 4,000 islands and 14 provinces, which span nearly 43,000 square miles between the western edge of the Atlantic Ocean and the Gulf of Mexico. Home to more than 11 million people, Cuba is, in a word, complicated.

To Americans, it's a forbidden land of dictatorship and deprivation (that also produces coveted, if illegal, cigars). To Canadians, South Americans and Europeans, it's a prime beach holiday destination. To Cubans who have expatriated, it's a totalitarian police state they're lucky to have escaped; to those who remain, it's a place where people watch out for and help each other, where nobody is a stranger.

Tourism is Cuba's second-largest industry, behind the export of services. In the first half of this year, tourism-related revenues for the island country were \$1.08 billion, a 4% increase over the same time period in 2013.



Americans are now allowed to travel to Cuba for specific and documented religious, professional or educational reasons. The embargo on travel for ‘personal satisfaction’ (i.e., tourism) remains. The number of Americans who legally visited Cuba in the first three months of 2014 far surpassed the number of British visitors for all of 2013. That’s how big the market is. If and when the U.S. embargo is lifted – which was championed in October 2014 in a New York Times editorial – it could have huge implications, not only for Cuba but also for smaller destinations in the Caribbean. Canada has 1/10th the population of the States, and it currently delivers nearly a million tourists to Cuba annually. Should the walls come down between the United States and Cuba, and assuming the same proportions, that could mean an influx of almost 10 million Americans.

Because of the hostilities between the two countries, however, most American visitors aren’t counted in Cuba’s totals. Even without including American visitors, North American arrivals – Canadians and Mexicans – account for 49.7% of Cuban tourists.

Meanwhile, Cubans are participating in the success of their own tourism industry for the first time. Until 2008, Cubans weren’t allowed to stay in tourist hotels, or even lay a towel on a resort beach (then again, given Cuban salaries, one night’s stay in a resort hotel could easily cost six months’ pay). And it was only last year

In 2013, Cuba welcomed 2.85 million visitors, who collectively generated \$1.8 billion in revenue. During the first half of 2014, arrivals grew 3.9% over 2013 to 1.66 million (from 1.59). The government’s goal is to surpass three million visitors this year.

Canada is Cuba’s largest market by far, delivering nearly a million visitors to the island nation. Officially, Britain and Germany are runners-up, though the numbers of American visitors have been increasing annually, especially since U.S. President Barack Obama lightened restrictions on travel to Cuba.





that Cubans were allowed to leave the country without a visa and a letter of invitation from their destination. So vacation options for Cubans have been, to put it mildly, limited. But it appears that many Cubans are choosing to vacation in their homeland, and domestic tourism is on the rise.

In the first six months of this year, 112,000 Cubans traveled overnight to Varadero, a resort area on the Hicacos Peninsula, a favorite destination of sun-seeking Canadians. According to the Havana Times, this marks a 21% increase in Cuban visitors to the region compared to the same time period in 2013.

Since the 1990s, Cuba has operated on a dual-currency system, with Cuban pesos (CUP, which can't be exchanged into any other currency) and 'convertible' pesos (CUC), which are on a par with the U.S. dollar. The former are the currency with which the government pays citizens and prices local goods; the latter is currency for tourism and trade. Last fall, Cuba announced it would be switching to a single currency system, but the nature and timing of this transition has yet to be confirmed; it's anticipated to go into effect by 2016.

While experts say this 'currency unification' is likely to cause temporary inflation, it's also more likely to affect resident Cubans than visitors or the tourism industry.



The country overflows with Spanish and Moorish colonial architectures (along with Italian, Greek and Roman influences); midcentury cars (new cars were among the items Fidel Castro banned Cubans from buying); world-renowned salsa, Afro-Cuban jazz and Spanish fusion music; cuisine influenced by Spain, France, Africa, Asia and Portugal, among others – and yes, beaches upon beaches. Visitors can go snorkeling during the day, explore museums, attend a theatrical performance and then go have a nightcap on the waterfront.

Among Cuba's cultural gems is Finca La Vigia just east of Havana, where Ernest Hemingway lived for 21 years and wrote some of his greatest work. Now a museum that features 'Papa's' bullfighting tickets, unfinished liquor and notes scrawled on the walls, the building is a study in Cuban-American cooperation and proof that art can transcend politics.

The country's second-largest city, Santiago de Cuba, includes San Pedro de Roca, an UNESCO World Heritage site, and Baconao Park, which is on the UNESCO World Heritage Biosphere Reserve List. In addition, the King's Garden in Cayo Santa Maria – a beach destination off the northern part of the main island – is also on the Biosphere Reserve list.

Although Cuba has a significant number of hotels compared to other Caribbean destinations, for its size, the country's stock of highly rated hotels is disproportionately small to its number of visitors. Development by foreigners is difficult, as the government owns most of the land, and the legalities are complex. Many properties were damaged by Hurricane Sandy in 2012, resulting in a net loss of inventory, though new accommodations have recently been added in the resort areas of Varadero, Cayo Santa Maria, Jardines del Rey and Holguin.

While Cuba doesn't rank highly in "hardware" – highly rated hotels or direct international flights – it shines brightly in culture of all kinds, from museums to nightlife to performances and landmarks.





4. JAMAICA

Jamaica is fighting flat results by providing arrival opportunities from more than 40 new markets, from Russia to Panama.

In 2013, Jamaica welcomed more than two million visitors, a 1.1% increase over 2012, with the highest gains in October (+11.2%) and November (+7.3%). Revenue from tourism was approximately \$2 billion USD. For the first half of 2014, Caribbean Journal reports, Jamaican visitation was only up 1.6%.

In 2013, the country made huge strides in terms of increasing airlift and access. New flights began arriving from Russia and Eastern Europe (Air Transaero), Germany (Condor), Sweden (Thomas Cook), Canada (Air Canada Rouge), Chicago (Air Trans), Denver (Frontier), the UK (Virgin Atlantic) and Panama (Copa). Together, these represent arrival opportunities from more than 40 new markets.

In conjunction with these new flights, the Jamaican government reduced visa requirements for entry into the country from numerous source markets, including Colombia, Venezuela, Panama, the Czech Republic, Hungary, Poland, Slovakia and the Ukraine. Combined, these moves should help boost the country's inbound tourism numbers considerably in the years to come.

As Jamaica draws a more international market, they're looking to make visitors feel at home. Three hundred workers in the hospitality sector are eligible for a 12-week Language Skills Training Programme, which teaches conversational Spanish and Russian to those who have the most contact with tourists. The \$3 million program is offered through the Tourism Product Development Company and paid for by the Tourism Enhancement Fund.



On the hotel front, it was a banner year, too, with more than \$20 billion (approximately \$220 million USD) in investments. Jewel Paradise Cove Resort and Spa in Runaway Bay (formerly Hedonism III) was given a \$5 million makeover by its new operators. The 130-room Courtyard Marriott Business in New Kingston, a \$2 billion/\$22 million USD development, is scheduled to open in 2015 and will create approximately 430 local and permanent jobs. The 226-room Braco Hotel in Trelawny, operated by Melia Hotels International, is expected to generate 400 jobs, while 250 renovated rooms have been added to the Royalton White Sands in Trelawny, and another 238 come from the new RIU Palace resort in St. James.

Meanwhile the government is injecting \$400 million (approximately \$4.5 million USD) into the resort area of Ocho Rios for a phased enhancement project that includes improvements on local roads, a significant upgrade of the cruise ship terminal and kiosks for crafts vendors. Crafts are a meaningful part of Jamaican heritage, and today, they're a significant industry.

When African slaves were brought to Jamaica during the 16th to 19th centuries, they brought with them vast creative skills that have been handed down through generations. To ensure the sector's sustainable growth, the government has set up a council to facilitate promotion, as well as local and international sales and marketing.

As cultural tourism grows, many travelers are interested in connecting with the residents of their chosen destinations; in turn, communities are finding ways to benefit from visitors. 2012 saw the launch of 'Villages as Businesses,' an initiative to help communities become sustainable through training and development. Although all-inclusive resorts are essentially the opposite of community tourism, Sandals Foundation has invested in this community training, as well as contributing money to improve infrastructure of communities near Jamaican Sandals resorts. It seems that even those who look for all-in-one resorts seek genuine local experiences, too.

Continuing the authentic tourism theme, The Jamaica Tourist Board's Meet the People program pairs visitors with residents who share a profession, interest or hobby – from physicians to architects to ecology. The locals



then share with visitors a unique Jamaican experience – visiting a local hospital, taking an architectural tour of Kingston, or hiking up the Blue Mountains. This program offers a more intimate connection with Jamaica and its people than would otherwise be possible – a trend that is likely to grow in appeal as travelers seek out increasingly unique, personal and authentic cultural experiences.

Culinary tourism is also on the rise in Jamaica, as evidenced by the country's first-place ranking in our report's Food and Drink Experiences. Both grassroots and professional culinary tours abound, enhancing tastes of classic Jamaican foods with context and history of the culture that gave rise to them. Along the 22-restaurant Jamaica Jerk Trail, for example, which launched in 2009 and spans from Negril all the way to Port Antonio, each chef showcases his or her unique combination of Jerk spices and seasonings. From the everyday staples, like chicken and pork, to the distinctly Caribbean goat and rabbit, visitors can find the perfect Jerk for their palate. Along with, of course, a variety of traditional side dishes like rice and peas and roasted yam – and a Red Stripe beer to cool down.

Jamaica's weakest area is in safety. Violent crimes against tourists – understandably – give people pause when considering vacation destinations. To address this issue, the Tourism Enhancement Fund (TEF) has provided \$91 million to make specific resort areas safe, including Negril Montego Bay, Falmouth and Ocho Rios.



5. BAHAMAS

In 2013, officials estimated that visitation to the Bahamas would increase 5-6%. Instead, it decreased 4.1%. Now, estimates are that the \$3.5 billion mega-resort Baha Mar will increase tourism by 30%. Overoptimistic?

Tourism has always been done in a big way in the Bahamas, an archipelago of 700 islands scattered across 100,000 square miles just off the coast of Miami.

The commonwealth's appearance at #5 on our absolute rankings list may simply be a byproduct of the its size and sheer volume of product – while most of the region's rankings were solidly in the top third, it wasn't #1 or #2 in any category. Of course, it couldn't have made the top five if visitors hadn't ranked the product highly.

Among the quality product, the biggest resort in the Bahamas to date has been Atlantis on Paradise Island, which features 3,414 rooms, 21 restaurants and a casino, as well as a six-hectare dolphin park and 57-hectare waterpark. Earlier this year, the resort became part of Marriott's Autograph Collection; property owners benefit from bookings through Marriott's site, while retaining management of the resort.

Baha Mar, now scheduled to open along New Providence's Cable Bay in late spring 2015, changes the scale – and the flood of luxury inventory associated with it may change the Bahamas' current 3rd-place rank for quality accommodations. Baha Mar comprises five resorts along what's being lauded as 'The New Riviera,' and with 2,200 rooms across Grand Hyatt, Rosewood, Melia, SLS and Baha Mar-branded properties – along with three luxury spas, exclusive shopping, a casino and a Jack Nicklaus signature golf course – Baha Mar is the biggest and most expensive thing ever to happen to not only the Bahamas, but the entire Caribbean. Originally, the resort was set to include a Mondrian property, but the company backed out earlier this year, and SLS took its place.

Lauded as one of the most environmentally friendly developments in the region, Baha Mar includes a 70-acre 'no-build' preserve of mangrove wetlands, a 100-acre stretch of adjacent wilderness and trails that allow visitors to explore the ecosystem without damaging it. In addition, 200 trees that were removed from the construction site will be replanted around the resort.



Baha Mar is expected to generate an additional \$1 billion in tourism revenue during its first year, to increase tourism by 30% and to add \$15.9 billion to the GDP over 20 years. All that, and it will create 8,000 permanent local jobs, too.

Over the past few years, Lynden Pindling International Airport in Nassau has undergone a three-phase, \$410 million expansion to accommodate the anticipated growth. With new domestic and international departures terminals, as well as a new one for domestic arrival, the airport can now accommodate 50% more passengers – a total of more than five million people. To increase loading capacity and make the passenger experience smoother, the airport also added 10 aircraft bridges and 30 ground loading positions.



Bahamian culture is renowned for its open-hearted friendliness and community spirit, with open-air straw markets, goombay music and festivals like Junkanoo – which was voted the Best Caribbean Celebration in the 2014 USA Today Readers' Choice Travel Awards, edging out Trinidad & Tobago's Carnival. In September, however, Canada issued a warning to visitors about crime in Nassau. This comes a little over a year after the American embassy in Nassau issued a similar warning, and 18 months after Bahamas Prime Minister Perry Christie told a group of Caribbean tourism stakeholders that crime was the single biggest threat to the region's tourism industry.

While Caribbean crime rates vary widely, the Bahamas is one of the least-safe destinations, and violent attacks on tourists are not uncommon. Crime may well be deterring visitors and inspiring them to visit safer areas of the region. And when two major source markets specifically caution their citizens, crime prevention becomes economic investment. An attorney quoted in the Nassau Guardian earlier this year said that the city is "one gunshot away from having cruise lines leave." Tourism accounts for 60% of the Bahamas' GDP and employs nearly half the workforce, according to Bahamas.com.



Major development is not confined to major Bahamian destinations; it's also coming to the offbeat Bimini Island (pop. 2,000), the rumored home to the Fountain of Youth and the remains of Atlantis, the lost continent. The waters surrounding the nine-square-mile island contain 14 of the world's most treasured coral reefs, which bring an estimated \$80 million annually into the local economy, according to the Bimini Blue Coalition.

Although the region's smallest habitable island has had a resort since 2007, most of its visitors have been wealthy individuals seeking an off-the-grid experience. It's also home to the Bimini Biological Field Station, a marine research facility that draws scientists from around the world.

Last summer, Genting Group, a Malaysian gaming consortium, purchased Bimini Bay Resort and turned it into Resorts World Bimini. They quickly added a casino, along with a new hotel and luxury villas, with further plans for another hotel, upscale shopping and nightclubs. While this creates local jobs, it also creates havoc on what was, until recently, one of the most rustic islands in the Bahamas.

This year, Genting began dredging channels to allow cruise ships (the company owns both Norwegian Cruise Lines and Star Cruises), a move quickly protested by local environmentalists. A court upheld that Genting could continue dredging, but many locals are concerned that the quiet Bimini Ernest Hemingway once wrote about, an ecotourism-based destination, is gone forever.

Yet the Bahamas has incentive to develop in an environmentally friendly way: It was one of three destinations that recently received a matching grant from Royal Caribbean to participate in a program called the Sustainable Development Alliance for the Americas (SDAA). As a partnership between Royal Caribbean, the Organization of American States (OAS) and the Caribbean Tourism Organization, the program is designed to encourage destinations to embed sustainability practices into both product development and marketing.





INDEXED RANKING TOP 5

01 Turks & Caicos Islands

02 Barbados

03 Trinidad & Tobago

04 Martinique

05 Anguilla



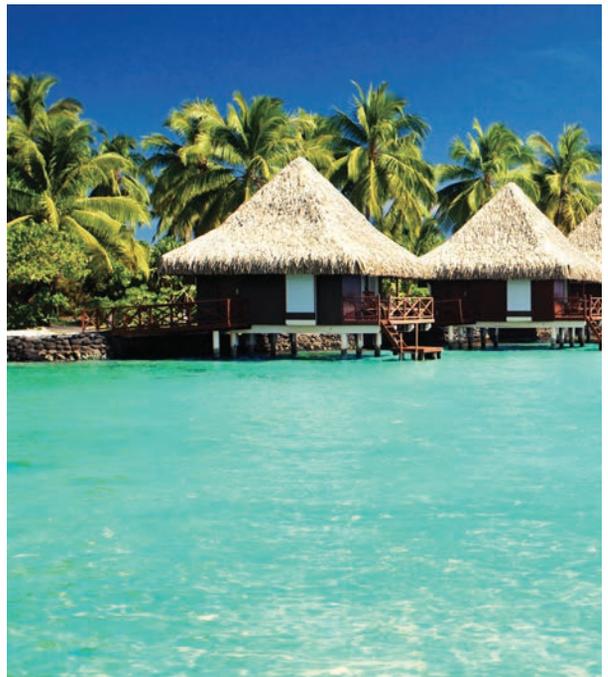
1. TURKS & CAICOS ISLANDS

The Number One destination in our Indexed ranking of Quality Tourism is an archipelago that just five years ago was embroiled in a major scandal, and that only six years ago was considered 'emerging.' It's fair to say that Turks & Caicos has arrived.

Tourism is relatively new to Turks & Caicos, and the islands have come a long way in the past half-decade. The first inklings of the world's largest industry arrived with Club Med in the 1980s, but it wasn't until 2008 that visitor numbers had topped 200,000. Last year, the archipelago welcomed more than a million visitors, a 10% increase over 2012, and so far this year, the numbers look even better: Arrivals in the first half of 2014 were 35% higher than 2013 (676,937), with nearly 200,000 overnight visitors.

The 33,000-strong local population has quickly mastered the business. In our Indexed Ranking, TCI came out on top for the best overall experience in the Caribbean, despite some mid-tier rankings (Museums, Performances) and relative lack of direct international air access compared to similar-sized destinations. In terms of individual categories, TCI topped the Outdoors category by a wide margin. With 89 discrete Outdoors experiences rated Very Good or Excellent, that's not surprising. The island of Providenciales is home to Grace Bay Beach, quite possibly – if it's possible to be objective about beauty – the world's most stunning beach. Condé Nast Traveler has crowned it so, and it's the #1 attraction in TCI on TripAdvisor, with a solid Excellent across more than 1,500 visitor ratings.

North America is currently the largest feeder market; in last year's Resonance Report on U.S. Affluent Travel & Leisure, TCI was the most coveted Caribbean destination by Americans with household incomes over \$150,000, with more than one in four respondents expressing interest in traveling there, though only 10% had actually set foot on its pristine sands. They may have been influenced by glowing reviews in U.S. magazines: TCI already regularly graces the pages of magazines like Condé Nast Traveler, Travel + Leisure, AFAR, Jetsetter and even Forbes, which called it 'the perfect Caribbean island [sic].' Some may attribute it to the fact that this British Crown colony is a tax haven, tax-free on income, capital gains and corporate profits.





TCI isn't yet the most accessible destination, but American, US Airways, Delta, JetBlue and Continental all fly direct to Providenciales International Airport (PLS), which is undergoing a \$10 million expansion to bring the traveler experience in line with TCI's high-end accommodations. In March, Delta introduced a new direct flight from Boston Logan and JFK to Providenciales International Airport; the airline also offers daily nonstop service from Atlanta to PLS.

But the biggest area for growth may be on the water-arrivals front. The European Union Development Fund (EDF) has granted TCI \$19 million to create a deep water port with a second cruise terminal in East Caicos. While the existing Grand Turk Cruise Center is on pace to welcome more than one million seafaring visitors this year, TCI is looking to make room to welcome even more. By expanding the number of tourists that can visit, the government also hopes to boost local employment in related fields.

While Premier Rufus Ewing has mentioned creating a 'mega port' that includes resort facilities, shopping and dining – along with moorage for cruise ships, cargo and yachts – details have yet to be confirmed.

Officials realize that hotel inventory needs to increase to keep pace with growing demand, particularly as they look at Europe, Latin America and Asia (especially China) as future markets. Occupancy already runs as high as 100% during the peak tourist season between November and March. Desarrollos Hotelco is in the planning stages of a Ritz-Carlton hotel-condo, and UK-based Circle Holdings is planning the \$100 million, 140-suite Third Turtle Resort and Marina.

TCI hasn't been without its challenges. Five years ago, the British government resumed control of the islands after a significant government corruption scandal. Between political upheaval, two devastating hurricanes and the global financial crisis, numerous development projects were halted, and investors began looking elsewhere. Earlier this year, however, Standard & Poor's upgraded TCI's credit rating to BBB+, placing it above the Bahamas and Barbados, among others.



2. BARBADOS

Barbados is struggling to realize its potential among a changing Caribbean tourism landscape. The creation of a separate Barbados Tourism Marketing Inc. (BTMI) and the Barbados Tourism Product Authority (BTPA) might help.

For the class-conscious English, Barbados was once the place to which one retreated simply to show that one could afford to vacation there. It was a destination synonymous with the Caribbean and with gentility, yet without any of the messiness that comes from a heritage of having been conquered dozens of times. Yet it's that messiness that creates unique cultures like those in Anguilla or Trinidad and Tobago – the layers and influences of different countries, traditions, cuisines and languages. That authenticity and uniqueness is what many travelers seek today.

In 2013, the island welcomed just over 500,000 overnight visitors, a net decrease of 5.2% from 2012, and the largest drop of any Caribbean destination, according to the Caribbean Tourism Organization. On the bright side, the number of visitors from Germany rose by 12.2%, and cruise arrivals increased 10.2%. Still, the most English of Caribbean islands is having to work hard to draw tourists, and arrivals in 2014 have been essentially flat.

Part of the island's challenge has been that, to date, there hasn't been any unified approach to destination marketing or product development; as a sector, tourism has been developed on an as-needed basis. With that in mind, in 2012 the Barbados Tourism Authority created both a Tourism White Paper and a nine-volume Tourism Master Plan. This fall, the Tourism Authority was divided into two complementary organizations, Barbados Tourism Marketing Inc. (BTMI) and the Barbados Tourism Product Authority (BTPA). While the organizations will work together, BTMI will focus on destination marketing, while BTPA will focus on developing the island's tourism offerings. The split was initiated by Barbados Minister of Tourism and International Transport Richard Sealy, who was recently elected Chair of the Caribbean Tourism Organization (CTO).

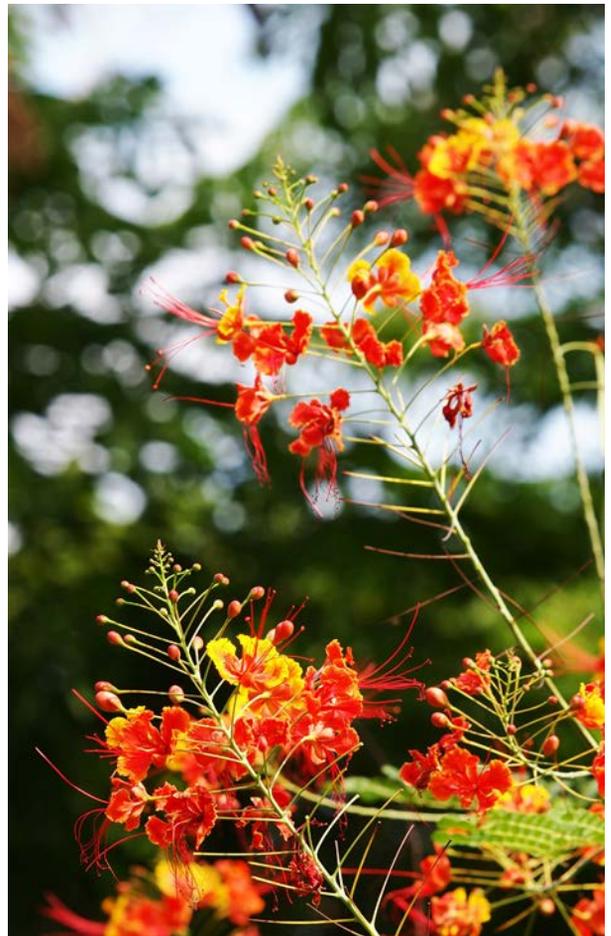


Photo: Flickr / Mark O'Connell

Barbados is far and away tops for shopping experiences, too, primarily because its stores are duty-free. Holetown, in St. James Parish, is home to the upscale, mixed-use Limegrove Lifestyle Centre, a blend of luxury shops, restaurants, cinema and residences. The neighborhood also includes a variety of independent craft, gift and clothing shops in Chattel Village, a pastel series of shops patterned after traditional Barbadian chattel houses.

On the experience front, the island's historic Bridgetown district, which features a large garrison dating back to the 18th century, was declared an UNESCO World Heritage Site in 2011. The architecture, which includes examples of Georgian and Pavilion alongside contemporary buildings – as well as some that are 300 years old – is a visual anchor for the social and commercial hub of Barbados. The area's Broad Street is a haven for visitors to explore open-air street markets and unique boutiques, while Pelican Village, on the outskirts, is home to numerous artists, including painters, potters, batik artists and weavers.

It's no surprise that Barbados came in second for food and drink experiences in our Indexed Ranking. The first Caribbean island to have its own Zagat guide, Barbados is most clearly focused on culinary tourism. This November will see the fourth annual Food, Wine and Rum Festival, co-sponsored by Travel + Leisure and Food and Wine magazines – a culinary endorsement if ever there was one. The festival brings together Barbados and world-renowned chefs for four days of epicurean and spirited delights, not only teaching attendees various cooking and pairing techniques, but also offering demonstrations and tasting events.





With 25 international direct flights from Europe, North and South America, Barbados has room for improvement in airlift and access, coming in ninth in our Indexed Ranking. On the positive side, Grantley Adams International Airport has been named the Caribbean's Leading Airport multiple times at the World Travel Awards.

While Barbados has properties at a variety of price points, there's no denying its inventory firmly skews upscale, with some resorts (like the ultra-swanky Sandy Lane) charging \$2,000 or more per room night. The island has 73 hotels rated Very Good or Excellent; when examined in light of visitor numbers, that leaves Barbados towards the bottom of the top 10.

Last summer, Sandals bought the former Couples Barbados; in February, the ultra-luxe resort closed to undergo a \$65 million renovation that will bring the 280-room property in line with the Sandals brand. The resort will re-open in December.





3.

TRINIDAD & TOBAGO

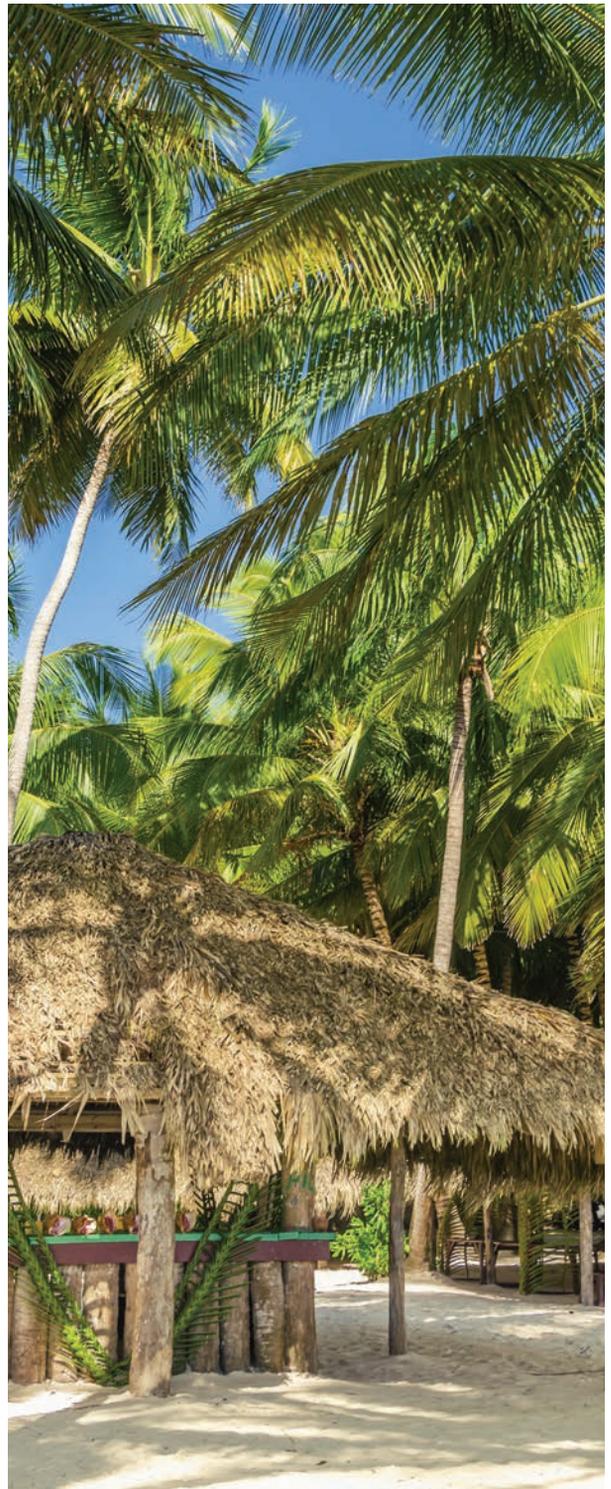
Trinidad and Tobago have come relatively late to the tourism game, but it hasn't taken them long to catch up and often pass their more experienced neighbors.

Just to the northeast of Venezuela lie the twin islands of Trinidad and Tobago. 'Twin' is a bit of a misnomer, in that cosmopolitan and corporate Trinidad is more than 10 times the size of its serene little sibling.

For more than a century, oil and gas have been the twins' main industries – Trinidad is home to the largest tar field in the world, and as the rest of the Caribbean embraced tourism, many local politicians hesitated to join the fray. In 2010, however, the government decided to diversify its economic foundation and began focusing on attracting visitors. Success followed quickly, with an EU Council on Tourism and Trade designation as the World's Best Tourism Destination for 2012.

Emphasis placed on access helped the country get a leg up: With 23 international direct flights – and more being added continually – Trinidad and Tobago offer its half-million visitors the most options for airlift (per visitor) in the Caribbean. Just this year, JetBlue has added two new direct flights, while Monarch and British Airways will increase their routes this fall.

Trinidad and Tobago are the yin and the yang of the Caribbean: Trinidad pulsates with business, music, culture and parties; approximately 96% of the country's 1.3 million residents live and work there. Tobago, by contrast, is home to beaches, 220 species





of birds, abundant towering waterfalls and the Tobago Main Ridge Forest Reserve, a rainforest which is under consideration as an UNESCO World Heritage Site. This contrast may put them in a position to become a capital of bleisure (business and leisure) in the region, which might in turn attract Millennials, who personify Generation Bleisure. As this demographic enters peak earning years, its members show a distinct proclivity for combining work and play.

While the country has a wide variety of experiences that appeal to visitors, its ultimate gift – the one people take home with them – may be the guiding principle of ‘harmony in diversity.’ And nowhere is this more evident than in the islands’ Food Experiences, which was Number 1 in our Indexed Ranking.

The country offers a palimpsest of flavors brought together, layered, configured and reconfigured by generations of settlers and immigrants from around the world – Africa, Southeast Asia, Europe, the Middle East and beyond.



Named by the Caribbean Journal as the region’s best destination for street food, the twin-island nation is becoming world-famous for hundreds of unique ‘Trini’ foods, from shark and bake to sugar cakes. Visitors can take tasting tours that reflect the culinary influences of the country’s ethnic neighborhoods, or wander along Ariapita Avenue in Port of Spain.

Given the islands’ cultural and creative capital, it’s not surprising that it also ranked #1 in Performances in our Indexed Ranking. Visitors can attend plays at the Trinidad Theatre Workshop, performances at the Trinidad Dance Theatre and a surprising diversity of music performances and religious celebrations, including Divali (Hindu), Corpus Christi (Christian) and Eid Al-Fitr (Muslim) and, of course, Carnival, which in Trinidad combines slave celebrations with Catholic traditions. Travel and Leisure Magazine ranks it 6th of 17 top Carnivals in the entire world. The only other Caribbean Carnival to make the list was Martinique’s, which came in at number 15.



4. MARTINIQUE

The exotic outpost of France and one of the rum capitals of the world is increasingly integrating itself into the region in order to grow influence and diversify its visitors.

Martinique's tourism industry employs 11,000 people and accounts for 9% of the country's GDP, according to Euromonitor. The island welcomes more visitors than it has residents (550,000 compared to approximately 400,000), the vast majority from France.

And therein lies the rub. As an outpost of La France, Martinique has traditionally been a bit isolated in its regional context. In August 2012, the island joined the Economic Commission for Latin America and the Caribbean, as well as the Association of Caribbean States, the Organization of Eastern Caribbean States

and the Caribbean Community. For the first time, Martinique can participate in regional planning, which should help with both airlift and strategic tourism planning – the goal of which would be to draw a more diverse group of travelers.

The island has unique offerings for Caribbean travelers: It's technically part of the European Union, so it has the infrastructure of a western country. Yet as part of the French Antilles, its geography includes more than 80 miles of hiking trails, lush rainforest, volcanic peaks and valleys, savannas and mangrove forests, meandering streams, towering waterfalls, and a few rare black sand beaches – a decidedly exotic experience.

Tourism authorities are working to improve access with increased flights, and the government seems well aware that its slowly-growing hotel inventory – of beautiful hotels de charme, as well as larger, international chains – needs to increase even more in order to give visitors a greater selection of quality accommodations.

Visitors clearly feel they need it. At number 23 of 26 destinations for accommodation in our Indexed Ranking, the island currently has few highly-rated



hotels from which its half-million visitors can choose. The trick will be to create and maintain properties that reflect the country's distinct Martinican personality and its Afro-Caribbean heritage.

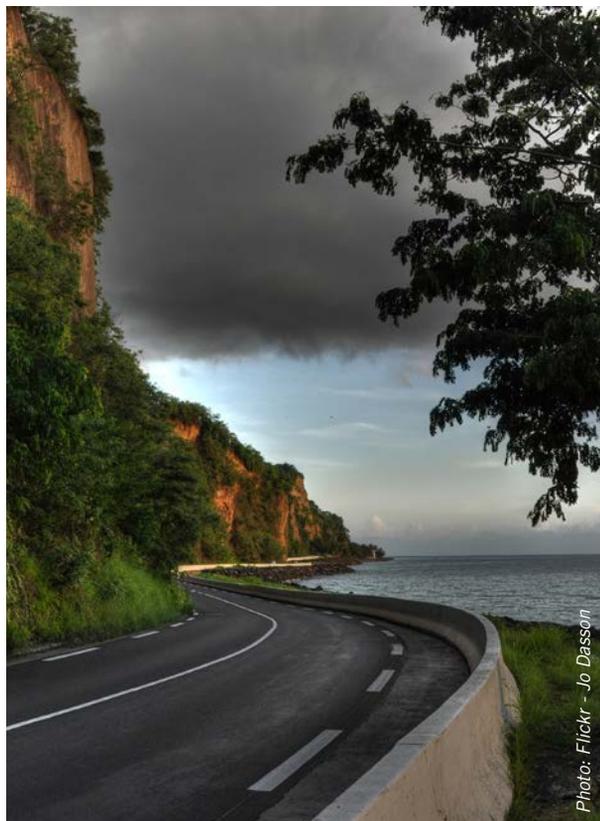
Several properties have either opened or been renovated this year, according to Travel Weekly: Le Fort Savane Hotel in Fort-de-France and Le Domaine de Fonds Blancs on the Atlantic coast are new. In Trois-Islets, Hotel La Pagerie recently underwent renovations to bring it up to four-star status, and nearby Hotel Bambou completed renovations of their rum-themed accommodations. Hotels that are standouts are truly exceptional, including the Relais & Chateaux 50-suite Cap Est Lagoon Resort & Spa. On a brighter note, visitors ranked Martinique third for exceptional Food Experiences and fourth for Restaurants in our Indexed Ranking. The island has the gourmet tastes of its mother country, layered with



Creole, African, East Indian and Asian spices, wrapped around seafood fresh from the water. This creates a unique gastronomic experience that results in dishes like grilled albacore paired with a creamy sesame aioli, banana and cod topped with creole sauce (for breakfast), cod fritters, avocado puree shrimp cocktail, perhaps topped off with coconut sorbet freshly made on the spot by a street vendor.

And while social media review sites don't have a separate category for rum, Martinique does consider itself the Rum Capital of the World, with more than a dozen distinctive rums unique to the island. There's a museum dedicated to the spirit and its ties to the island's history of sugar cane production.

This summer, a new organization called Les Ateliers Médélices launched opportunities to not only consume the delicious Martiniquais food, but also to learn how to prepare it. Instructors include Chef Jean-Charles Bredas, who was named one of the 'Four Best Caribbean Chefs' by Bon Appetit. The company also offers a package for visitors to travel to a farm at the base of Mount Pelee, where they pick ingredients from the field and prepare their own authentic Martinican meal – and there are similar trips to fruit, vegetable and mushroom farms. For visitors who want to make the most of le rhum, meanwhile, Les Ateliers Médélices offers weekly workshops in perfecting local cocktails.





5. ANGUILLA

Anguilla has a small population, but big ideas – its Sustainable Tourism Master Plan, created in 2011, aims to steer the island on a strategic path toward growth...without leaving the community behind.

At the northern edge of the British Leeward Islands, Anguilla is one of the Caribbean's most intimate and private islands. With mostly flat and rocky land that is inhospitable to agriculture, the tiny population is extremely dependent on tourism – it's the one thing that can grow here. And grow it has; Anguilla enjoys a well-earned reputation as an exclusive and hospitable getaway for the famous and the affluent. Fortunately, tourism is a natural for a population that has a welcoming spirit and embraces community, and nearly 20% of the 15,000-person population is employed in tourism-related jobs.

According to the Caribbean Tourism Organization, in 2013, the island welcomed just over 69,000 visitors, a 6.2% increase over 2012. The first half of 2014 saw mild growth (2.6%), according to the Caribbean Journal. This was concentrated in January, which marked a 21.6% increase in arrivals over the same month last year, including a 4.6% increase in overnight visitors.

In 2011, the Ministry of Tourism created a Sustainable Tourism Master Plan (STMP), with a vision for 2020, identifying the pace and types of growth that would most benefit Anguilla's tourism industry as well as residents and the local economy. Overall, the island is aiming for moderate growth of approximately 7.5% each year through 2020. By the end of the decade, the



government hopes to be drawing 196,000 overnight tourists. This increase is estimated to generate an additional 2,000 tourism-related jobs, bringing the total to 5,000.

The goal is to allow the island to grow based on a community-based and strategic vision, rather than the desires of developers and investors. For instance, all 33 of Anguilla's pristine beaches are public, and the community takes pride in not having a single all-inclusive resort. The wealth – and visitors tend to be wealthy – is shared among restaurants, hotels, shops and cultural sites, rather than kept within the gates of a single Club Med or Sandals.

Another particularity is the total absence of cruise ships here – the waters aren't deep enough to create a berth, so visitors must fly or arrive by yacht or ferry. Among the projects suggested in the Master Plan are



Photo: Flickr - Alan Turkus

an expansion of the airport, including an upgrade of terminal facilities and a runway extension, as well as additional moorage for yachts, including mega-yachts and marina amenities. Downtown, the plan envisions a vehicle-free central plaza, as well as cultural and ceremonial plazas, food halls and increased retail.

Food, in fact, is key: in our rankings, Anguilla left the rest of the Caribbean in the dust – or the pearly sand, as it were – when it comes to high-quality restaurants per visitor. Our indexed ranking shows that the island has 77 restaurants rated Very Good or Excellent by visitors, a remarkable feat considering the island's small size. Condé Nast Traveler described the scene as 'Haute Caribbean' and says it boasts "more quality restaurants per square mile than Manhattan." Caribbean Journal named it the top food destination in the region, while AFAR lauded Jacala, an intimate open-air restaurant for its French-inspired menu.

The island has been inventive in the creation of new tourism product: in 2012, the community launched a literary festival based on the national concept of "jollification" – people helping each other out with, as the name suggests, much levity. The festival has been



such a resounding success that hotels offer special package deals and local air carrier LIAT schedules additional flights solely for the event.

While Anguilla ranked #2 for hotels, with 21 properties rated highly by visitors, it will need to grow its inventory as visitor numbers increase. According to the SMTP, by 2020, the island will require a total of 2,675 rooms, or a 65% increase over 2010 stock.

One of the most interesting properties (featured in Jetsetter) is CuisinArt – yes, that Cuisinart. In addition to 98 suites and villas, the property has a hydroponic garden, offers hands-on cooking classes, several exceptional restaurants and an 18-hole Greg Norman golf course. Development is underway for a new hotel, The Reef, on the eastern end of the property.

Malliouhana, an Auberge Resorts property, has been closed for three years to undergo renovations, and is set to re-open in time for the winter 2014-15 season.

Numerous other hotels are in various stages of development or renovation, according to Travel Agent Central, including Zemi Beach Resort and Spa (2015), the Anguilla Great House and Frangipani Beach Resort.





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