



4th QUARTER
STATISTICAL REPORT

BARBADOS[®]

TOURISM MARKETING INC.

RESEARCH DEPARTMENT

2015





Classical Pops



RUN BARBADOS[®] MARATHON



OVERVIEW OF SOURCE MARKETS

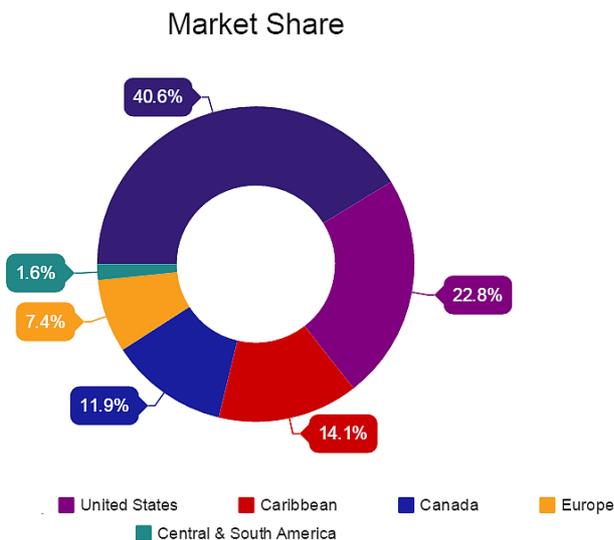
For the 4th Quarter of 2015, some 159,393 tourists visited the shores of Barbados. This represented a 11.5% increase or an increase of 16,453 visitors over the same period for 2014. Year to date arrivals totaled 592,302 an increase of 13.7% when compared to the same period of 2014. The cruise sector generated, 190,467 arrivals for this quarter which represented, a 15% increase over 2014. For 2015, cruise arrivals totaled 586,615, an increase of 27,692 visitors or a 5% increase when compared to 2014.

Market Share

The **United Kingdom** remained the top producing market and accounted for 40.6% of traffic to Barbados, which was an increase of 17.1% when compared with the 4th Quarter of 2014.

The **United States** followed in second position (22.8%) registering an increase of 16% compared to the corresponding period for 2014.

The **Caribbean** has shown growth, with an overall increase of 18% and accounted for 14.1% of business. Trinidad and Tobago recorded a 25.9% increase whilst the other Caribbean territories also showed increases of 14.7% when compared with Q4 2014.



Canada accounted for 11.9% of overall business, a 0.9% decline when compared with Q4 2014.

The **European** market contributed 7.4% of business for the reporting period; however this represented a decrease of 6.1%. Germany recorded an 8% decrease in visitor flows and the other countries of the European region experienced a decrease of 5.2%.

The **Central & South American** market continued to decline, accounting for 1.6% of overall traffic; with Brazil recording a decrease of 63.6% over 2014.

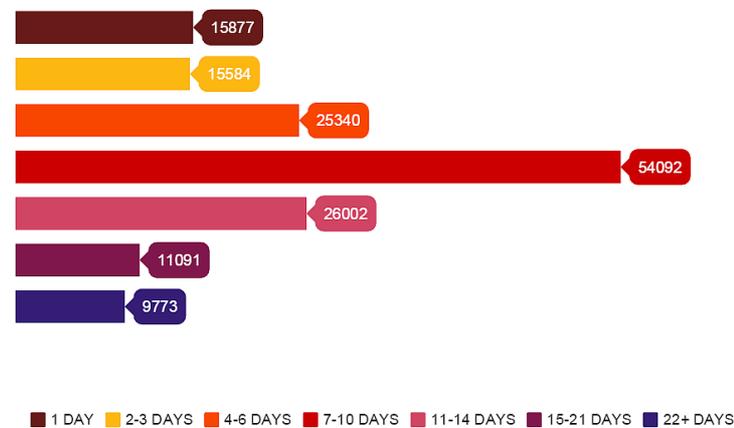
Purpose of Visit

Pleasure (74.8%) recorded the largest purpose visit for tourists to Barbados for the 4th Quarter of 2015, followed by business (6.8%) and visiting friends & relatives (VFR) (5.4%). For the 4th Quarter 2015, those tourists who travelled for pleasure grew by 10.5% while business and VFR traffic decreased by 26.7% and increased by 8.9% respectively.

Accommodation

Staying with friends (21.2%) was the most popular accommodation type used by international tourists, recording an 9.7% increase compared to the same period for 2014. Luxury stays (18.2%) saw increases of 2.6% whilst hotels with over 100 rooms (14.8%) and villas (13.3%) recorded increases of 16.1% and 10.5% respectively.

Length of Stay



Length of Stay

Most visitors stayed on island 7 – 10 days accounting for 33.9% of business. This was a 12.6% increase from this segment of tourists when compared with Q4 2014. Approximately 16% of tourists stayed for 11 – 14 days recording an increase of 6.7% when compared with the previous year. Visitors who stayed 4 - 6 days represented 15.9% of the share, which was a decrease of 16.3% over the same period of the previous year.

Age

Tourists in the 46-55 and over category generated 21.6% of business, which represented a growth of 12.7%. The 56 – 65 age grouping had a marginal share of 17.4% (+11.2%) over the 26-35 age grouping which accounted for 16.9% of business and increased by 14.9% when compared with 4th Quarter 2014.

Origin

Greater London and Scotland generated most of the business during this month from individual counties, contributing 12.1% and 4.5% of overall business from this market. This represented increases of 23.8% and 100+% respectively. Of note, Surrey represented 4.4% of this market's share and recorded a 34.2% increase over Q4 2014.

Cumulatively for 2015, this market has continued to show steady growth with an increase of 14.1% when compared to 2014.

Purpose of Visit

During the 4th Quarter of 2015, 84.8% of UK visitors travelled for the main purpose of pleasure, an increase of 16.6%. The second highest reason for travelling was VFR (2.8%) this segment rose 5.6% when compared to the same period for 2014. The business traveller represented 1.9% of the share and showed a decrease of 68.9%.



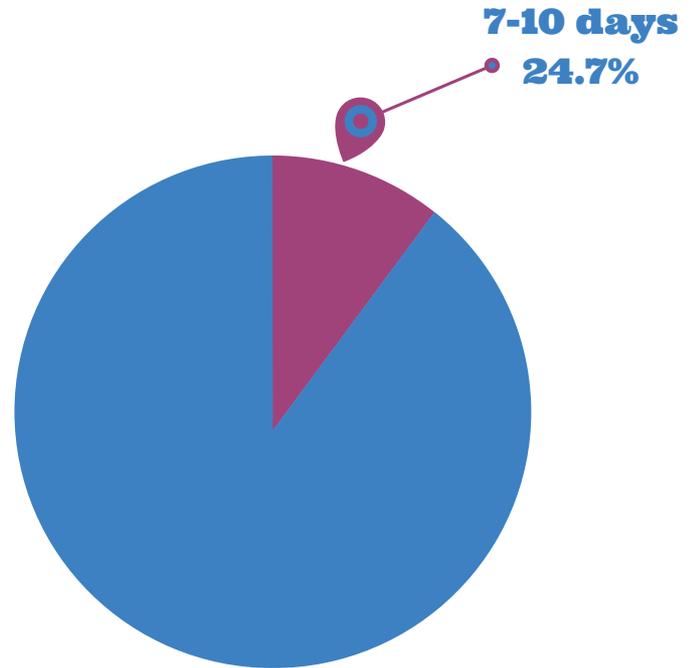
Vacation
84.4%

Accommodation

Luxury accommodation remained in high demand by UK visitors (23.5%) and represents an increase of 8.8%. All-inclusive visitors (17.8%) recorded 2650 additional tourists, whilst those staying in villas (14.1%) showed an increase of 19.5% in business compared with Q4 2014. Hotels with over 100 rooms accounted for 12.7% of business and rose by 20.2% over the same reporting period for last year.

Length of Stay

Approximately forty-two percent of UK travellers stayed on island for 7 – 10 days (+20.9%) while 24.7% stayed or an 11 – 14 day duration which represented a 13.1% increase. Fifteen to twenty- one days registered an 8.3% increase and generated 13.9% of this market's business. The one day traveller contributed 7.3% of business and registered 890 additional tourists.



Age

The category 46 - 55 had the largest age grouping of tourists from the UK to Barbados for Q4 2015; recording 23.5% share, an increase of 19.3% when compared with Q4 2014. The 56 - 65 demographic continues to gain ground (19%) registering a rise of 17.3% compared with the same period for last year. The tourists ages 26 - 35 and 36 - 45 both accounted for approximately 14% of the share and registered increases of 19.3% and 16.4% respectively.

UNITED STATES

Origin

The North East/Mid-Atlantic region continues its trend as the top performer for the 4th Quarter of 2015. The state of New York accounted for 30.5% of business, recording an increase of 9.3% of tourists when compared to the same period last year. The South-East state Florida (10%) was the second highest contributor from the USA market; and this state experienced an increase of 10.7%.

Year to date, this market saw an additional 29,474 visitors when compared to January to December 2014.

Purpose of Visit

Of the total US travellers, 75.6% came to Barbados for the purpose of pleasure. This represented an increase of 18.4% when compared with the same period for 2014. VFR traffic contributed 8.6% with an increase of 3.7%. Business (5.3%) however, experienced a decline of 29.4% when compared with Q4 2014.

Accommodation

Staying with friends was the preferred choice of accommodation from this market, for the 4th Quarter. Approximately 30% of tourists opted for this type of accommodation, with a 6.6% increase in business over the previous year. The luxury segment (17.8%) had an increase of 4.9% whilst hotels with 100 rooms (16.3%) showed an 20.5% increase over Q4 2014.

Length of Stay

Most US travellers stayed an average of 7 – 10 days (34.3%), an increase of 20.2%. The 4 – 6 grouping registered 26.7% of overall tourists, a 24.9% improvement over Q4 2014. The 11 – 14 day category saw an additional 179 tourists and accounted for 9.7% of this market share's business.

Age

The 46 - 55 grouping accounted for 21% of business, an increase of 17.9% when compared with Q4 2014.

The 56-65 grouping (18.6%) had a marginal share with an increase of 12.5%. The 26-35 (16.3%) and 36-45 groups (16.1%) also increase by 29% and 12.9% respectively.



26-35
16.3%



36-45
16.1%



46-55
21%



56-65
18.6%

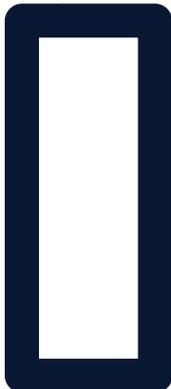
Friends

30%



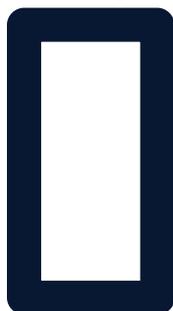
Luxury

17.8%



Hotels with 100 rooms

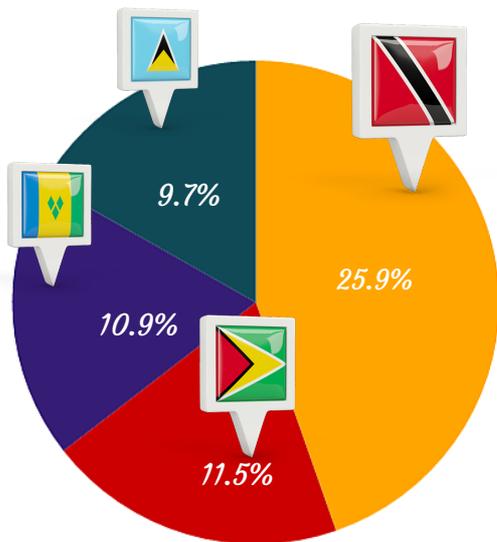
16.3%



Origin

The top producing Caribbean country for the 4th Quarter of 2015 was Trinidad and Tobago; which contributed 31.8% of overall business from this market. This represented a growth of 25.9% when compared with Q4 2014. Guyana (11.5%) was the second highest producer, followed by St. Vincent and the Grenadines (10.9%) and St. Lucia (9.7%), these territories recorded increases of 22.3%, 14% and 27.6% respectively.

Collectively, Caribbean arrivals showed a 10.7% increase when compared to January to December of the previous year.

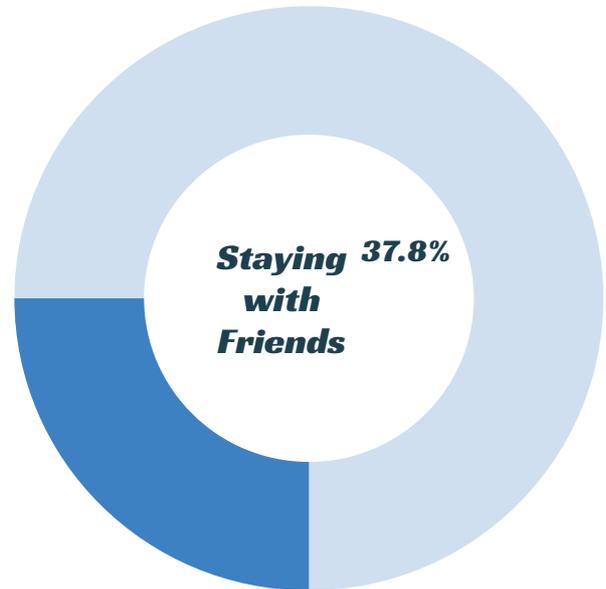


Purpose of Visit

The main purpose of visit for Caribbean travellers was for pleasure. This segment accounted for 41.3% of traffic, which was an increase of 16.8% over 2014's figures. Business travellers increased (6.4%) for the 4th Quarter of 2015 with a 23% share. The VFR segment captured the 3rd largest share (9.1%) but experienced a gain of 31.1%.

Accommodation

Most of these regional travellers stayed with friends accounting for 37.8% of business, registering an increase of 16.5%. The hotels with over 100 rooms contributed 18.5%, with 36.4% in additional tourists. Villa and intimate stays (9.6%) continued their upward trend with 17.6% and 4% in growth respectively.



Length of Stay

The majority of Caribbean tourists stayed between 4 and 6 days representing a 24.5% share and an increase of 13.7% when compared with Q4 2014. Approximately twenty-four (24%) of the overall count stayed 2 - 3 days which was an increase of 16.3% over the same period last year. Those visitors who opted to stay for 1 day accounted for 20.1% of the share, which represented a 36.2% increase. The 7-10 day traveller accounted for 13.4% of the share and registered an increase of 20.6%.

Age

Travellers between the ages of 26 – 35 accounted for 23.7% of business from this market, which represents a 27.7% rise. The 36 – 45 (21.5%) and 46 – 55 (18.2%) categories both recorded increases of 19.3% and 9.8% respectively.

Origin

Ontario was the top producing province for the month of Q4 2015 from the Canadian market. The city of Toronto contributed 17.5% of the overall business, recording a 5.2% increase. Montreal East/Central from the province of Quebec was the second highest producing city with a share of 5% of business, registering a 10.8% decrease when compared with Q4 2014. Hamilton and Mississauga both captured the spot of the 3rd highest producing city, both accounting for 3.4% of this market's share and registered increases of 27.1% and 5.6% respectively.

For the period January to December, Canadian arrivals increased by 13% when compared with the same period of 2014.

Purpose of Visit

Canadians travelling to Barbados for pleasure accounted for 81.6% of overall traffic flows from that market. This represented a decrease of 2.9% when compared with the same period for 2014. VFR traffic (5.9%) recorded a 7.5% decrease when compared with Q4 2014.



Staying with Friends

24.2%

Accommodation

Staying with friends across the island was the preferred choice for Canadians during the 4th Quarter of 2015. This type of accommodation accounted for 24.2% of business and registered a 1.5% decrease.

Tourists who opted to stay in villas (17.8%) decrease by 7.4% when compared with the same period for the previous year. Luxury and hotels with over 100 rooms continue to show growth, contributing 13.9% and 12.1% which represented a decrease of 11.5% and an increase of 6.8% respectively.

Length of Stay

The most popular period to stay on island for Canadians was between 7 - 10 days (38.1%). When compared to the same period last year there was a 3.2% decrease. Stays of 4 - 6 days (16%) grew by 8.8% and Canadians who stayed 11 - 14 days (15.6%) showed a significant decrease of 5.3% over Q4 2014.



7 - 10 days

38.1%

Age

The 46 - 55 age grouping accounted for 21.1% of business; an increase of 2.8% when compared with Q4 2014. The 56 - 55 age grouping had a 19.7% share, whilst the 66+ category had a share of 15.6%.

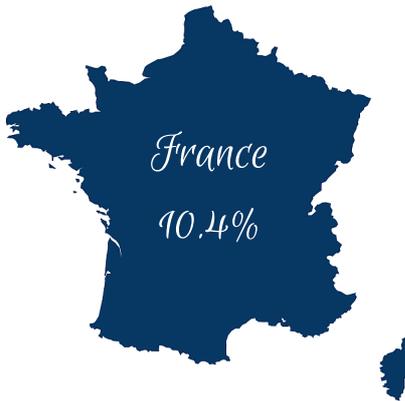
This represented an increase of 0.9% and a decrease of 9.6% respectively.

EUROPE

Origin

Germany continued to be the top producing country from the European region. This country accounted for 33.6% of business, a 8% decrease when compared to Q4 2014. France was the second highest producer, contributing 10.4% of the overall European count, and recording a 3.1% decrease when compared with the same period for last year.

Cumulatively this market was on the decline, recording a decrease of 9.2% when compared to January to December 2014.



Purpose of Visit

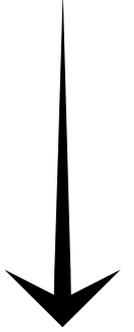
The main purpose of visit for Europeans was leisure. This accounted for 78.8% of overall traffic, but this segment decreased by 8.3% when compared with Q4 2014. Business (5.9%) traffic had an decrease of 40.1%. Travellers who came for VFR contributed 2%; however the performance had a rise of 6.2%.

Accommodation

Luxury accommodations (23.9%) were the preferred choice for most Europeans registering a decrease of 4.6%. Villas (15.9%) and hotels with 100 rooms (15.4%) were also top contenders; experiencing decreases of 12% and 11.3% respectively.



Luxury
23.9%



-4.6%

Length of Stay

Approximately twenty-two percent (22%) of Europeans stayed between 7 – 10 days in the destination. This however was a decrease of 17% when compared with Q4 2014. Tourists staying 15 - 21 days (14.7%) and 22+ days (13.2%) registered increases of 15.4% and 92.8% respectively.

Age

Of all tourists from this market, 21.9% of those between the ages of 46 – 55 chose Barbados as their destination for the 4th Quarter of 2015. This was 5.8% less when compared with the same period last year. There was a marginal share between those in the 26 – 35 (21.4%) and 36 – 45 (19.2%) grouping. These categories recorded decreases of 12.5% and 10.8% respectively.

CENTRAL & SOUTH AMERICA

Origin

Brazil continues its trend as the top producer from the Central & South American Market. For the 4th Quarter of 2015, 29.3% of all tourists from this market originated from the country of Brazil, registering a 63.6% loss in tourists traffic when compared to the same period for last year. Venezuela was the second highest contributor with 21.4% of arrivals; however this territory recorded a rise of 28.7%. Colombia captured the 3rd highest spot for this region with 16.3% of the share which represented an increase of over 200%.

Year to date, this market recorded an overall decrease of 3.8% over the same period of last year.

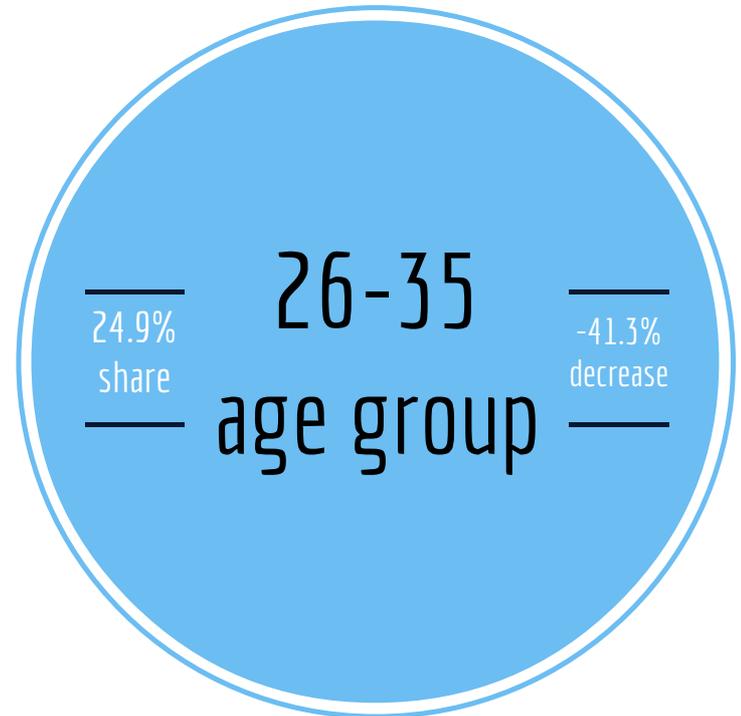


Length of Stay

This region saw most of travellers staying 7 – 10 days (32.2%), registering a decline of 55% when compared with Q4 2014. There was a marked decrease in visitors staying for 4 – 6 days (20.3%), registering a 16.1% decrease. The 2 - 3 days (16.6%) and 1 day (14%) categories however saw increases in traffic of 11% and 6.7% respectively.

Age

Tourist arrivals from this market between the ages of 26 – 35 (24.9%) were the highest producers for this reporting period. This demographic decreased by 41.3% when compared with Q4 2014. The 36 – 45 grouping (24.4%) and the 46 – 55 grouping (19.3%) also recorded decreases of 27.6% and 20%.



Purpose of Visit

Most visitors from this market travelled for the purpose of pleasure (59.5%). This segment decreased by 41.9% when compared with Q4 2014. The business market contributed 13.8% registering a decrease of 29.2%. Conference traffic represented 7.3% of the share and experienced a loss of 2.2%.

Accommodation

In Q4 travellers from this market had a preference for hotels with over 100 rooms. This type of accommodation contributed 33.6% of overall business and fell by 14.1%. Luxury (17.1%) and those opting to stay with friends (11.8%) both recorded decreases of 39.5% and 8.1% respectively.



**Barbados Tourism Marketing Inc.
1st Floor Warrens Office Complex
Warrens, St.Michael
Barbados, W.I.
BB12001**

Tel: 1 246 467 3600

Fax: 1 246 426 4080

Web: www.visitbarbados.org

Email: researchdept@visitbarbados.org

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