



3rd QUARTER
STATISTICAL REPORT

BARBADOS[®]

TOURISM MARKETING INC.

RESEARCH DEPARTMENT

2015



OVERVIEW OF SOURCE MARKETS

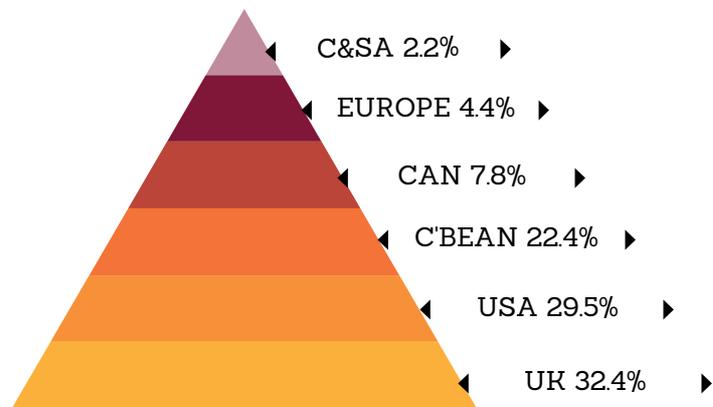
For the 3rd Quarter of 2015, some 129,050 tourists visited the shores of Barbados. This represented a 14.9% increase or an increase of 16,743 visitors over the same period for 2014. Year to date arrivals totaled 432,909 an increase of 14.5% when compared to the same period of 2014.

Market Share

The **United Kingdom** remained the top producing market and accounted for 32.4% of traffic to Barbados, which was an increase of 10.1% when compared with the 3rd Quarter of 2014.

The **United States** followed in second position (29.5%) registering an increase of 33.5% compared to the corresponding period for 2014.

The **Caribbean** has shown growth, with an overall increase of 9.3% and accounted for 22.4% of business. Trinidad and Tobago recorded a 9.6% increase whilst the other Caribbean territories also showed increases of 9.1% when compared with Q3 2014.



Canada accounted for 7.8% of overall business, a 3.7% rise when compared with Q3 2014.

The **European** market contributed 4.4% of business for the reporting period; however this represented an increase of 3.5%. Germany recorded a 1.1% decrease in visitor flows and the other countries of the European region experienced an increase of 5.2%.

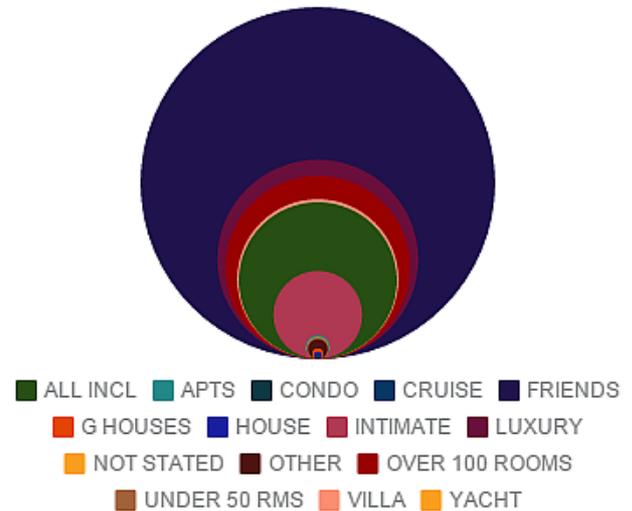
The **Central & South American** market continued to show steady growth accounting for 2.2% of overall traffic; with Brazil recording a decrease of 1.1% over 2014.

Purpose of Visit

Pleasure (72%) recorded the largest purpose visit for tourists to Barbados for the 3rd Quarter of 2015, followed by business (8%) and visiting friends & relatives (VFR) (5.8%). For the 3rd Quarter 2015, those tourists who travelled for pleasure grew by 14.5% while business and VFR traffic increased by 7.2% and 8.7% respectively.

Accommodation

Staying with friends (27%) was the most popular accommodation type used by international tourists, recording an 7.7% increase compared to the same period for 2014. Luxury stays (15.3%) saw increases of 7% whilst hotels with over 100 rooms (14%) and villas (12.2%) recorded increases of 42.5% and 15.9% respectively.



Length of Stay

Most visitors stayed on island 7 – 10 days accounting for 30.6% of business. This was a 14.5% increase from this segment of tourists when compared with Q3 2014. Approximately 18% of tourists stayed for 4 – 6 days recording an increase of 27.2% when compared with the previous year. Visitors who stayed 11 - 14 days represented 17.2% of the share, which was a decrease of 0.5% over the same period of the previous year.

Age

Tourists in the 46-55 and over category generated 20.1% of business, which represented a growth of 13.8%. The 26 – 35 age grouping had a marginal share of 18.4% (+26.5%) over the 36-45 age grouping which accounted for 17.2% of business and increased by 20.3% when compared with 3rd Quarter 2014.

UNITED KINGDOM

Origin

Greater London and Surrey generated most of the business during this month from individual counties, contributing 10% and 3.8% of overall business from this market. This represented increases of 13.9% and 41.3% respectively. Of note, despite only representing 2.9% of this market's share, West Sussex recorded a 200+% increase over Q3 2014.

Cumulatively for 2015, this market has continued to show steady growth with an increase of 12.9% when compared to 2014.

Purpose of Visit

During the 3rd Quarter of 2015, 83.4% of UK visitors travelled for the main purpose of pleasure, an increase of 4.9%. The second highest reason for travelling was VFR (3.7%) this segment rose 3.3% when compared to the same period for 2014. The business traveller represented 2.2% of the share and showed an increase of 8.4%.

Accommodation

Luxury accommodation remained in high demand by UK visitors (21%) and represents an increase of 18.7%. All-inclusive visitors (20.8%) recorded 1120 additional tourists, whilst those staying with friends (15.6%) showed an increase of 2.8% in business compared with Q3 2014. Villa stays accounted for 13.2% of business and rose by 7.5% over the same reporting period for last year.

Length of Stay

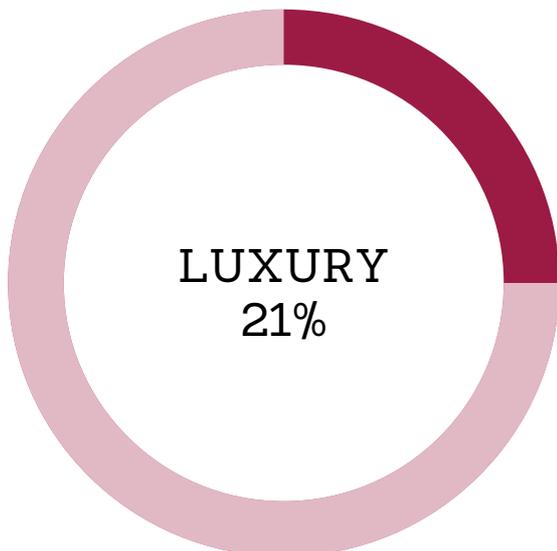
Approximately thirty-five percent of UK travellers stayed on island for 7 – 10 days (+6.8%) while 31.7% stayed for an 11 – 14 day duration which represented a 0.9% decrease. Fifteen to twenty-one days registered a 1.1% increase and generated 10% of this market's business. The one day traveller contributed 7.8% of business and registered 2203 additional tourists.

Age

The category 46 - 55 had the largest age grouping of tourists from the UK to Barbados for Q3 2015; recording 24.1% share, an increase of 8.5% when compared with Q3 2014. The tourists ages 26 - 35 and 36 - 45 both accounted for 14% of the share and registered increases of 22.9% and 17.1% respectively. The 56 - 65 demographic continues to gain ground (12.5%) registering a rise of 2.6% compared with the same period for last year.



46 - 55
24.1%



UNITED STATES

Origin

The North East/Mid-Atlantic region continues its trend as the top performer for the 3rd Quarter of 2015. The state of New York accounted for 34.7% of business, recording an increase of 22.8% of tourists when compared to the same period last year. The South-East state Florida (9.7%) was the second highest contributor from the USA market; and this state experienced an increase of 36.5%.

Year to date, this market saw an additional 24,467 visitors when compared to January to September 2014.

Purpose of Visit

Of the total US travellers, 76% came to Barbados for the purpose of pleasure. This represented an increase of 35.4% when compared with the same period for 2014. VFR traffic contributed 7.9% with an increase of 13.4%. Business (5.2%) also experienced an increase of 24.7% when compared with Q3 2014.

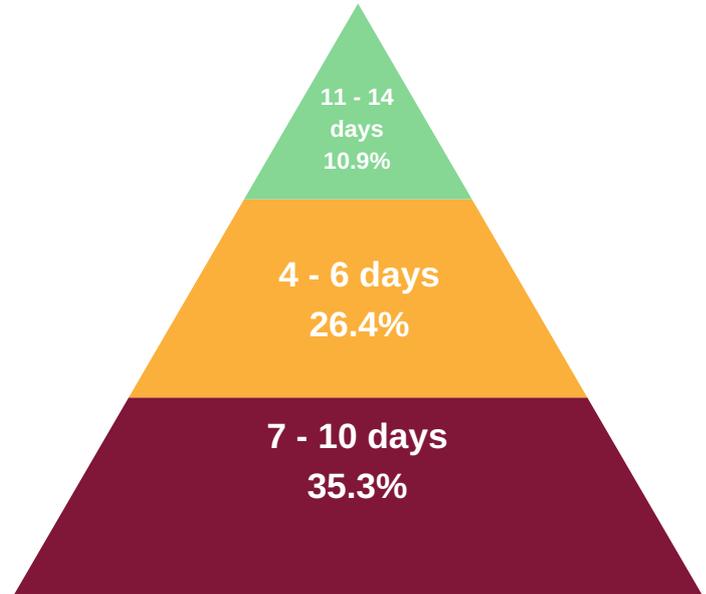


Accommodation

Staying with friends was the preferred choice of accommodation from this market, for the 3rd Quarter. Approximately 32% of tourists opted for this type of accommodation, with a 11.1% increase in business over the previous year. The luxury segment (15.9%) had an increase of 9.2% whilst hotels with 100 rooms (15.8%) showed an 78.6% increase over Q3 2014.

Length of Stay

Most US travellers stayed an average of 7 – 10 days (35.3%), an increase of 40%. The 4 – 6 grouping registered 26.4% of overall tourists, a 44.4% improvement over Q3 2014. The 11 - 14 day category saw an additional 305 tourists and accounted for 10.9% of this market share's business.



Age

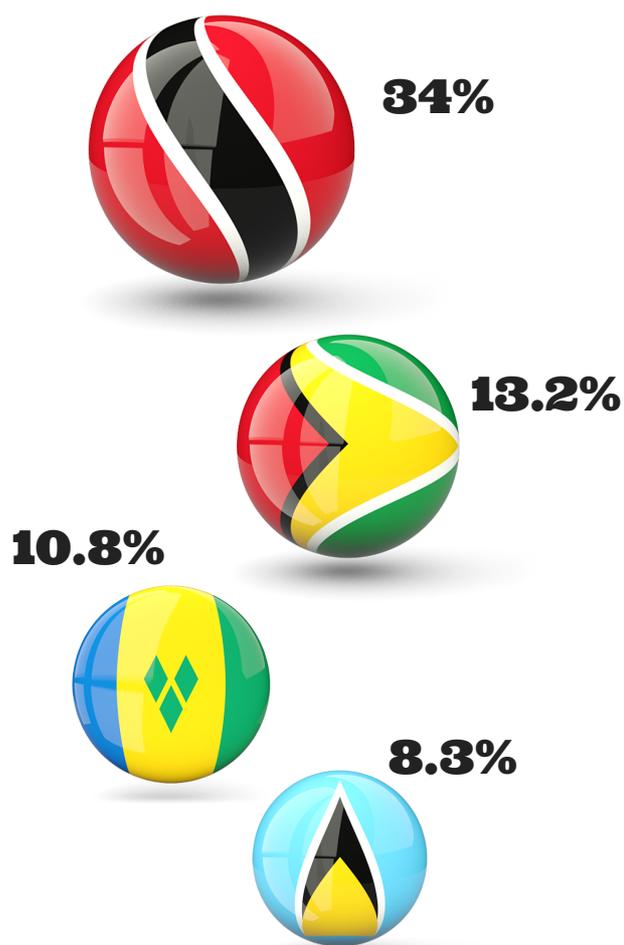
The 26 - 35 grouping accounted for 19.4% of business, an increase of 59.2% when compared with Q3 2014. The 46-55 grouping (19.1%) had a marginal share with an increase of 32%, while the 36-45 group (17.4%) also increase by 39.2%.

CARIBBEAN

Origin

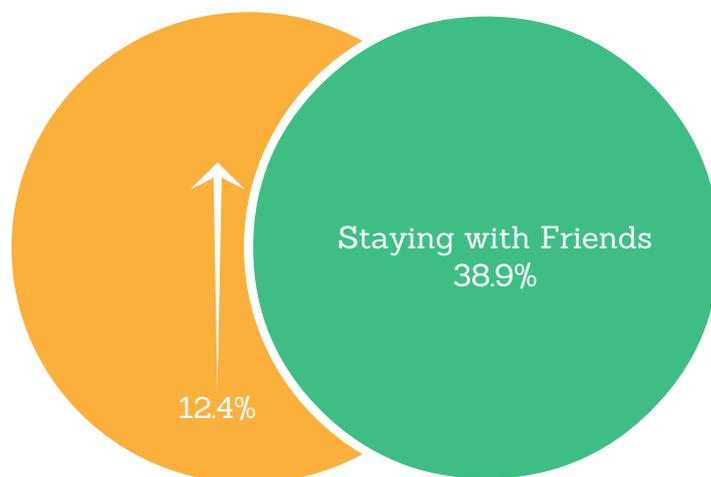
The top producing Caribbean country for the 3rd Quarter of 2015 was Trinidad and Tobago; which contributed 34% of overall business from this market. This represented a growth of 9.6% when compared with Q3 2014. Guyana (13.2%) was the second highest producer, followed by St. Vincent and the Grenadines (10.8%) and St. Lucia (8.3%), these territories recorded increases of 16.1%, 9.3% and 5.7% respectively.

Collectively, Caribbean arrivals showed an 8.6% increase when compared to January to September of the previous year.



Accommodation

Most of these regional travellers stayed with friends accounting for 38.9% of business, registering an increase of 12.4%. The hotels with over 100 rooms contributed 16.2%, with 23.1% in additional tourists. Villa stays (11.6%) continued their upward trend with 12.7% in growth.



Length of Stay

The majority of Caribbean tourists stayed between 4 and 6 days representing a 25% share and an increase of 18.4% when compared with Q3 2014. Approximately seventeen (17%) of the overall count stayed 2 - 3 days which was an increase of 6.5% over the same period last year. Those visitors who opted to stay 7- 10 days accounted for 16.4% of the share, which represented a 4.1% increase. The one day traveller accounted for 15.3% of the share and registered an increase of 15%.

Age

Travellers between the ages of 26 – 35 accounted for 21.9% of business from this market, which represents a 15.3% rise. The 36 – 45 (20.2%) and 46 – 55 (16.4%) categories both recorded increases of 12.8% and 7.3% respectively.

Purpose of Visit

The main purpose of visit for Caribbean travellers was for pleasure. This segment accounted for 50.6% of traffic, which was an increase of 19% over 2014's figures. Business travellers increased (3.4%) for the 3rd Quarter of 2015 with a 19.8% share. The VFR segment captured the 3rd largest share (6.2%) but experienced a gain of 16%.

Origin

Ontario was the top producing province for the month of Q3 2015 from the Canadian market. The city of Toronto contributed 14% of the overall business, recording a 1.1% increase. Montreal East/Central from the province of Quebec was the second highest producing city with a share of 4.7% of business, registering a 10.1% decrease when compared with Q3 2014. Mississauga captured the spot of the 3rd highest producing city, accounting for 3.4% of this market's share but registered a decline of 3.9%.

For the period January to September, Canadian arrivals increased by 18.7% when compared with the same period of 2014.

Accommodation

Staying with friends across the island was the preferred choice for Canadians during the 3rd Quarter of 2015. This type of accommodation accounted for 33.4% of business and registered a 4.5% decrease.

Tourists who opted to stay in villas (14.7%) increase by 19.8% when compared with the same period for the previous year. Hotels with over 100 rooms and luxury continue to show growth, contributing 11.5% each which represented an increase of 36% and a decrease of 17.1% respectively.

Length of Stay

The most popular period to stay on island for Canadians was between 7 - 10 days (34.9%). When compared to the same period last year there was a 0.3% decrease. Stays of 4 - 6 days (17.1%) grew by 12.6% and Canadians who stayed 11 - 14 days (13%) showed a significant decrease of 15.5% over Q3 2014.

Age

The 46 - 55 age grouping accounted for 20.3% of business; an increase of 8.2% when compared with Q3 2014. The 26 - 35 age grouping had a 16.8% share, whilst the 36 - 45 categories had a share of 16.6%. This represented increases of 12.8% and 12.6% respectively.



Purpose of Visit

Canadians travelling to Barbados for pleasure accounted for 73.4% of overall traffic flows from that market. This represented an increase of 0.7% when compared with the same period for 2014. VFR traffic (8.3%) recorded a 3.1% decrease when compared with Q3 2014.

EUROPE

Origin

Germany continued to be the top producing country from the European region. This country accounted for 25.9% of business, a 1.1% decrease when compared to Q3 2014. France was the second highest producer, contributing 21.3% of the overall European count, and recording a 15.6% increase when compared with the same period for last year.

Cumulatively this market was on the decline, recording a decrease of 10.6% when compared to January to September 2014.



Purpose of Visit

The main purpose of visit for Europeans was leisure. This accounted for 77.7% of overall traffic, but this segment decreased by 0.2% when compared with Q3 2014. Business (6.4%) traffic had an increase of 2%. Travellers who came for VFR contributed 2.4%; however the performance had a slight decline of 4.3%.

Accommodation

Luxury accommodations (20.6%) were the preferred choice for most Europeans registering an increase of 9.3%. Villas (17.3%) and hotels with 100 rooms (14.5%) were also top contenders; experiencing increases of 3.3% and 8.2% respectively.



Luxury
20.6%

Length of Stay

Approximately thirty percent (30%) of Europeans stayed between 7 – 10 days in the destination. This however was a decrease of 0.5% when compared with Q3 2014. Tourists staying 11 - 14 days (18.8%) and 4 - 6 days (14.8%) registered a decrease of 3.4% and an increase 5% respectively.

Age

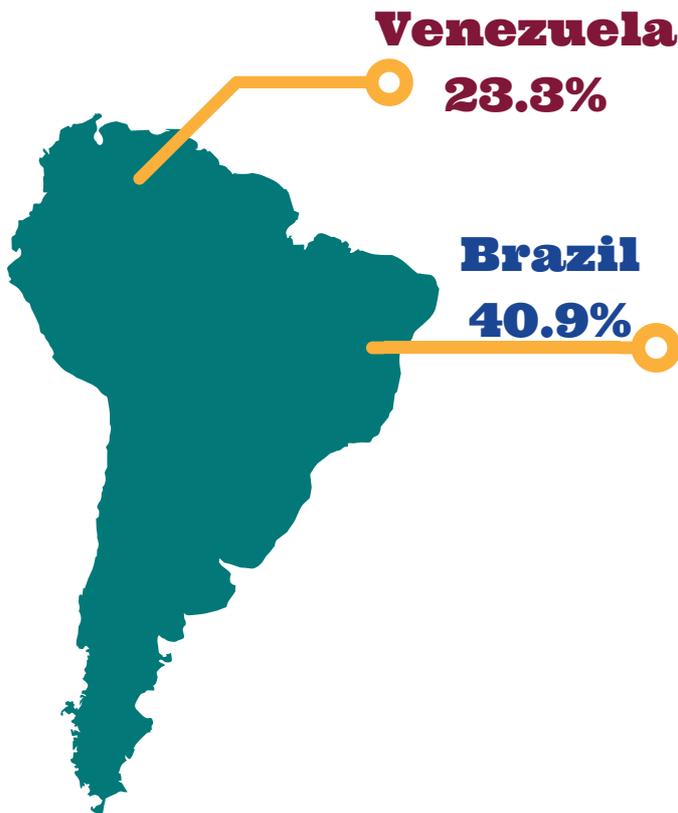
Of all tourists from this market, 25.2% of those between the ages of 26 – 35 chose Barbados as their destination for the 3rd Quarter of 2015. This was 4.4% more when compared with the same period last year. There was a marginal share between those in the 36 – 45 (19.7%) and 46 – 55 (18.6%) grouping. These categories recorded increases of 7.2% and 3.3% respectively.

CENTRAL & SOUTH AMERICA

Origin

Brazil continues its trend as the top producer from the Central & South American Market. For the 3rd Quarter of 2015, 40.9% of all tourists from this market originated from the country of Brazil, registering a 1.1% loss in tourists traffic when compared to the same period for last year. Venezuela was the second highest contributor with 23.3% of arrivals; however this territory recorded a rise of 100+%.

Year to date, this market recorded an overall increase of 9.1% over the same period of last year.



Purpose of Visit

Most visitors from this market travelled for the purpose of pleasure (61.6%). This segment increased by 11.2% when compared with Q3 2014. The business market contributed 13% registering a decrease of 3.5%. Conference traffic represented 7% of the share and experienced a gain of 19%.

Accommodation

In Q3 travellers from this market had a preference for hotels with over 100 rooms. This type of accommodation contributed 33.1% of overall business and grew by 96.6%. Luxury (25.8%) and those opting to stay in villas (10.4%) both recorded increases of 0.6% and 33% respectively.

Length of Stay

This region saw most of travellers staying 7 – 10 days (42.2%), registering growth of 6.4% when compared with Q3 2014. There was a marked increase in visitors staying for 4 – 6 days (17%), registering an 49.7% increase. The 2 - 3 days (14.9%) and 1 day (12.6%) categories also saw increases in traffic of 37.9% and 125+% respectively.



Age

Tourist arrivals from this market between the ages of 36 – 45 (26.2%) were the highest producers for this reporting period. This demographic increased by 19.9% when compared with Q3 2014. The 26 – 35 grouping (21.2%) and the 46 – 55 grouping (19.4%) also recorded increases of 8.7% and 39.4%.



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