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Annual Report of Tourist Arrivals

Preface

This publication serves as a substitute for the usual Monthly Statistical Bulletins of Tourist Arrivals for the year 2015. It presents a similar statistical analysis, however additional indicators of tourist arrivals have been included along with a greater level of disaggregation.

The data for this report was provided by the Immigration Department from the Embarkation/Disembarkation (E/D) cards and the cruise ships' manifests. Detailed information on stay-over arrivals and summary cruise ship arrivals data were respectively derived from these sources.

As of December 2014, the Immigration Department defined a new classification to allow for the identification of crew members who spend at least one (1) night in Barbados. In light of this new information the BSS has decided to classify those crew cases as Business/Conference arrivals. This adjustment should therefore be taken into consideration when studying historical trends against current and future purpose of visit statistics for tourist arrivals.

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The Annual Report of Tourist Arrivals 2015/2014 was prepared and published by the Socio-Economic and Gender Statistics Division of the Barbados Statistical Service.

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Definitions

Visitor:

Any person (national or alien) normally resident abroad, who enters the island for not more than six months for legitimate non-immigrant purposes such as recreation, holiday, sports, conference, health, visiting family or friends, religious pilgrimage or study.

Tourist:

A visitor whose visit includes an overnight stay in the country (also referred to as a stay-over or overnight visitor).

Cruise Passenger:

A visitor who arrives by cruise ship and whose visit does not involve an overnight stay on the island, a same-day visitor (or excursionist).

Landed Cruise Passenger:

A cruise ship passenger who permanently disembarked on the island. (Includes direct-transits, tourists and residents)

CARICOM:

The Caribbean Common Market which includes Antigua, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname and Trinidad and Tobago. Also included here is Anguilla, an Associate CARICOM member.

Non-Resident (Barbadian) National:

Any (Barbadian) national who usually resides abroad.

Length of Stay:

The intended duration of a visitor's stay on the island as indicated on arrival.

Seasons:

Winter Season – January to April

Summer Season – May to December

A Comparative Overview

Introduction

Throughout the year 2015, Barbados attracted a total of **1,303,272** visitor arrivals. This translates to an increase of **8.2%** when compared to the **1,204,243** arrivals recorded in 2014. Among these, **591,872** were tourists or stay-over arrivals, representing a **13.9%** increase compared to the previous year, which recorded **519,635**. The remaining **711,400** were cruise ship passengers, which grew by **3.9%** when compared to 2014 (see Pg.11 **Table 1**).



Strong positive growth recorded for stay-over visitor arrivals in 2015

Stay-Over Arrivals

Demographic Profile

Among total stay-over visitor arrivals the distribution of demographic characteristics remained relatively constant over the period under review, while experiencing mixed rates of growth.

arrivals in the same period (see pg.11 **Table 1**). Tourist arrivals by males and females grew by **13.5%** and **14.3%** respectively when compared to 2014. The sex ratio of overnight visitors in 2015 was therefore 110 females per 100 males.

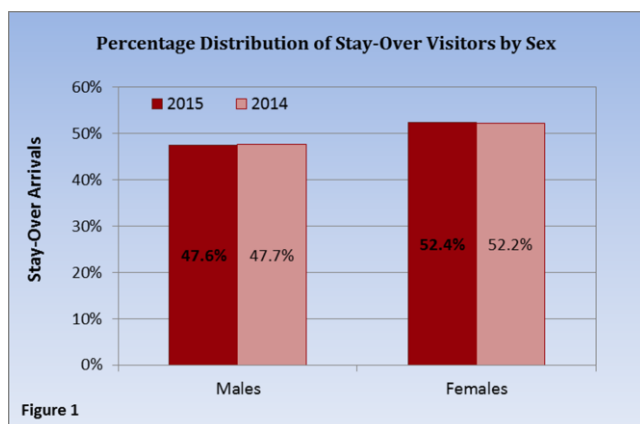
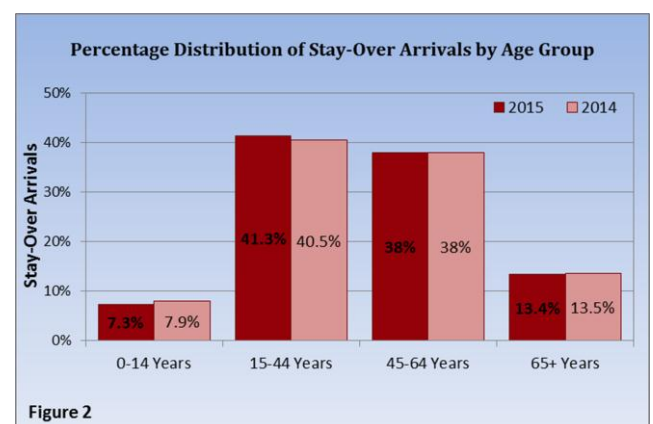


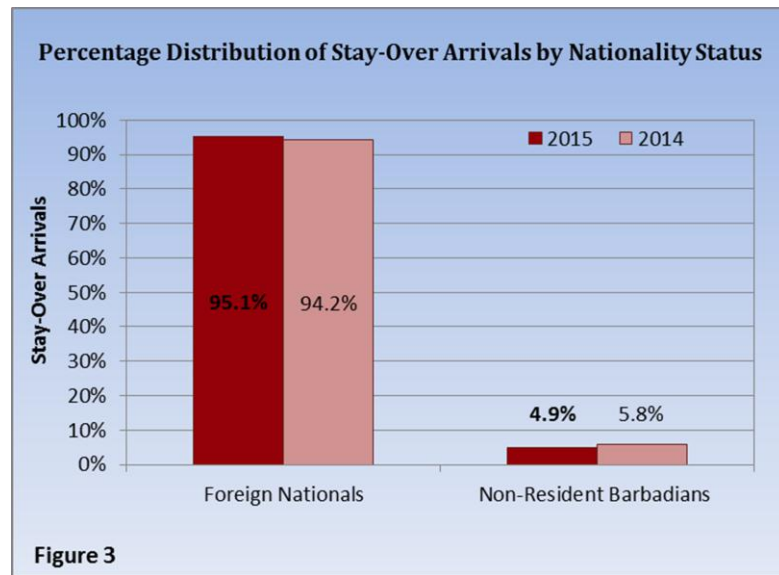
Figure 1 shows that over the review period, the majority of stay-over arrivals were females. In 2015, **52.4%** of stay-over arrivals or **310,353** tourists were female. While males represented **281,516** tourists or **47.6%** of total stay-over



With respect to the age distribution of stay-over arrivals, **Figure 2** illustrates the domination of overnight arrivals by visitors aged 15-64 years. Those 15-44 years of age represented **41.3%** of total stay-over arrivals in 2015, while those 45-

Continued from page 4

64 years accounted for **38%**. Arrivals by children under the age of 15 and adults 65 years and over accounted for **7.3%** and **13.4%** of total stay-overs correspondingly. Growth rates in tourist arrivals by age group ranged from a low of **4.6%** among visitors 0-14 years of age and peaked at **16.2%** among those 15-44 years.



A review of stay-over visitor arrivals by nationality status also revealed consistency in distribution over the review period (see **Figure 3**). *Foreign Nationals* represented the vast majority of stay-over arrivals with a **95.1%** share in 2015, marginally above the share of **94.2%** share recorded in 2014. This translates to a **15%** increase in arrivals by visitors of foreign nationality when compared to 2014.

Non-Resident Barbadians therefore accounted for the remaining **4.9%** of total stay-over arrivals, moving slightly below the proportion of **5.8%**, which was recorded in the year 2014. A reduction in arrivals by non-resident Barbadian nationals was observed in 2015, with a **3.4%** decline falling to **28,978** from **30,005** in the previous year.

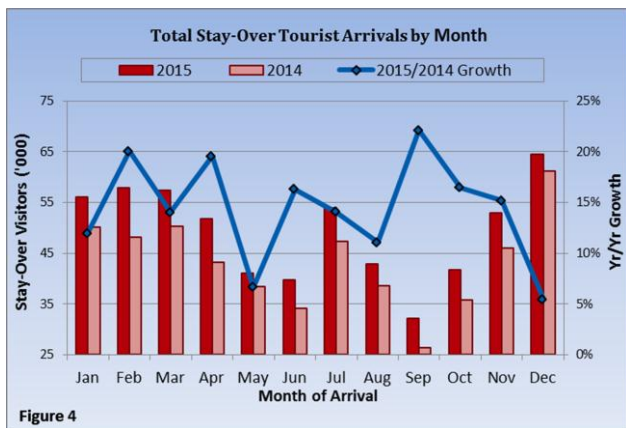
2015/2014 Highlights

- Visitor Arrivals in 2015 totaled 1,303,272 (↑8.2%).
- Stay-over arrivals grew by 72,237 tourists (↑13.9%).
- Cruise passengers numbered 711,400 (↑3.9%).
- Landed cruise passengers numbered 121,578 (↑2.6%).
- Gender ratio for 2015 stay-over arrivals: 110 females per 100 males.
- Arrivals by Barbadians resident abroad declined (↓3.4%).
- Stay-over arrivals by Foreign Nationals in 2015 totaled 562,897 (↑15%).
- Most tourists were aged 15-44 years in 2015 (↑16.2%).

Monthly Arrivals Review

Throughout the year 2015, robust monthly growth contributed to the overall improvement in stay-over visitor arrivals as depicted below in **Figure 4**. The most significant rate of growth was observed in the month of September, with an increase of **22.1%** to **32,153** tourist arrivals over the **26,329** recorded in the same month of 2014. This strong performance was closely followed by increases of **20%** and **19.5%** in the months of February and April respectively.

The lowest rates of positive growth occurred in the months of May and December, which registered increases of **6.6%** and **5.4%** respectively. The remaining months showed comparatively moderate growth over the period with increases ranging from **11.1%** in August to **16.5%** in October.



Throughout the winter of 2015 (January-April), stay-over arrivals totaled **223,015** (**37.7%** share), representing **16.2%** more than the **191,848** recorded in 2014. The summer season recorded **368,857** arrivals (**62.3%** share) and registered growth of **12.5%** over the **327,787** of 2014 (see Pg. 12 **Table 2**).



The U.S.A visitor market supplied a significantly larger number of tourists in the year 2015 compared to 2014

Market Analysis

Figure 5 clearly shows that with the exception of the *Other European* market, stay-over visitor arrivals in 2015 outperformed those in 2014.



The U.K continued to dominate the overnight visitor market with a total of **214,175** tourists; a market share of **36.2%** (**Figure 6**). The U.K market recorded positive growth of **14.6%**, which was second to that of U.S.A. Stay-Over arrivals from U.S.A totaled **148,067** tourists, up by **24.9%**, to record the highest level of growth among visitor markets. This rate of growth was impacted by increased arrivals in the months of September (**44%**) and March (**42.4%**) (see Pg.12 **Table 2**). Growth in the tourist arrivals out of the U.S.A market reflected an increased market share to **25%** from **22.8%** in 2014 (**Figure 6**).

Continued from page 6

Other CARICOM arrivals increased by **14.8%** over 2014 to **58,321** visitor arrivals. Among these, the most significant increases in arrivals were recorded by Bahamas (**27.7%**), St. Lucia (**21.5%**), Grenada (**21.5%**) and Dominica (**21.2%**), while declines were recorded among visitors from Anguilla (**16.9%**), Haiti (**12.5%**) and Montserrat (**2.1%**). The remaining CARICOM countries all showed positive growth in the arrival of stay-over visitors ranging from **6.6%** for Jamaica to **19.5%** for Antigua (see Pg.13 **Table 3**).

Canadian visitor arrivals grew over the period by **13.2%**. This improvement was influenced by strong growth recorded in the winter season (January - April) of 2015, which recorded **8,008** (or **26.8%**) more visitors than in the previous year.



2015/2014
Highlights

- ▶ Positive growth achieved among stay-over arrivals in each month of 2015.
- ▶ Winter season stay-overs grew by 31,167 (↑16.2%).
- ▶ Summer season tourist arrivals increased by 41,070 (↑12.5%).
- ▶ The U.S.A market showed significant improvement in the supply of tourists (↑24.9%).
- ▶ Stay-Over Arrivals from the Other European visitor market fell by 4,230 (↓12.9%).



As previously noted, in 2015 the *Other European* market was the only one which recorded reduced levels of arrivals, with a **12.9%** fall when compared to 2014. As displayed in **Figure 6**, this significant decline resulted in reduced market share from **6.3%** in 2014 to **4.8%** in 2015. This decline in arrivals from *Other Europe* was mainly driven by a **24.6%** decline during the winter season, led by the month of March which fell by **28.8%** (see Pg.12 **Table 2**).

Purpose of Visit

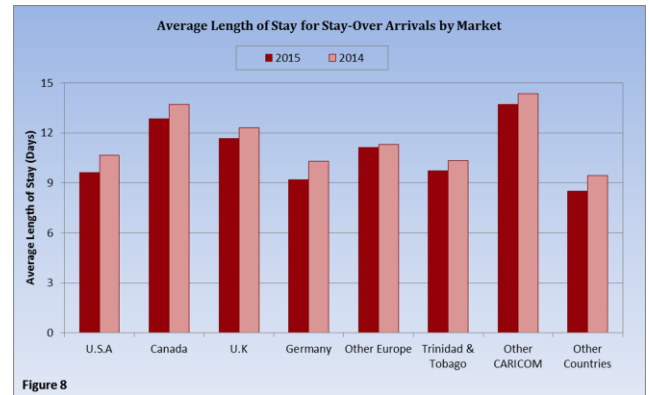
Among total stay-over arrivals to Barbados in 2015, **486,344** visitors or **82.2%** came for *Recreation*, representing a **10.4%** increase when compared to 2014 (see Pg.11 **Table 1**). Of these, positive growth occurred among recreational arrivals that came to *Visit friends etc.*, (**6%**), on *Holiday* (**11.1%**), to Get Married/Honeymoon (**20.4%**) and for *Sports* (**19.9%**). While *Other Recreation* arrivals fell by **18.5%** (**Figure 7**).



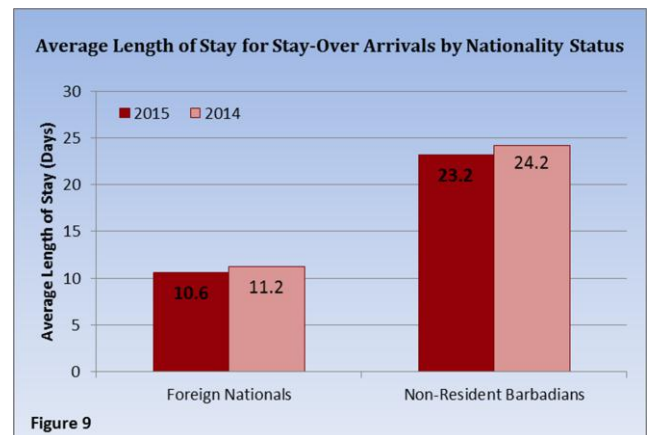
The most significant growth level was clearly achieved among visitors who travelled to Barbados on business or to attend conferences, which showed positive growth of **49.3%** when compared to 2014. Declines in arrivals were recorded among visitors who came for purposes of *Other Recreation* (**18.5%**), *Other* (**7.7%**), *Study* (**3.3%**) and *Health Care* (**0.8%**).

Length of Stay

In 2015 the average intended length of stay among total stay-over visitors was **11** days; this was one day less than the **12** days spent on average in 2014 (see Pg.14 **Table 5**).



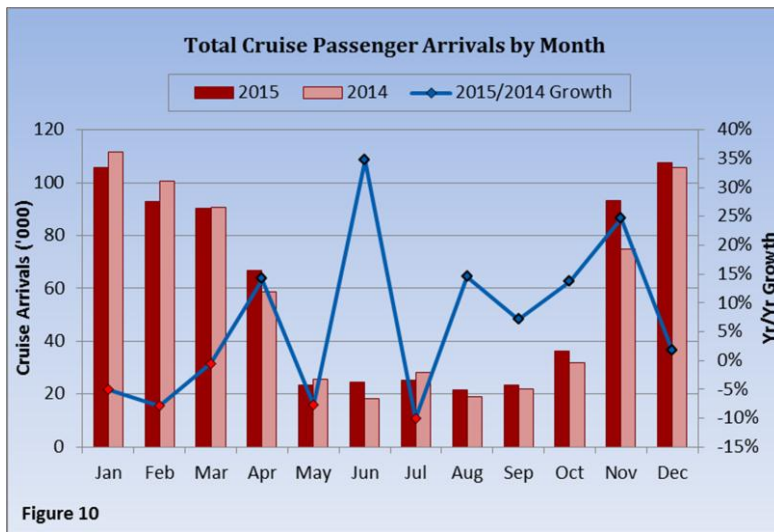
From **Figure 8** above, it is evident that the average length of stay also fell among each of the visitor producing markets. In 2015 the average length of stay among visitors originating from *Other CARICOM* (**14** days), Canada (**13** days), and the U.K (**12** days) were higher than the average for all visitors in the same year. This trend was also true for 2014.



An assessment of the length of stay by Nationality Status revealed that among stay-over arrivals, non-resident Barbadian nationals stayed (**23** days in 2015 compared to **24** days in 2014) twice as long as visitors of foreign nationality over the review period (**Figure 9**).

Cruise Passengers Arrivals

The **3.6%** growth recorded among cruise passenger arrivals in 2015 was largely driven by increased summer arrivals which moved to **355,408** from **325,144** in 2014, recording a **9.2%** increase over the period. Winter cruise arrivals however fell by **1.6%** to **355,992** compared to **361,686** in 2014 (see Pg.13 **Table 3**).



Throughout the review period, declines in cruise passenger arrivals were registered in the months of January, February, March, May and July by rates of **5%**, **7.8%**, **0.5%**, **7.7%** and **10%** respectively (**Figure 10**). The most significant growth among the remaining months was recorded in June with a **34.7%** increase in cruise passenger arrivals when compared to 2014. The performance was followed by November which grew at a rate of **24.6%** over the previous year.

The number of landed passengers also increased over the review period to **124,785** in 2015, compared to **128,932** the previous year (see Pg.11 **Table 1**). These increases may have been impacted by an additional **4** cruise liner calls, which were recorded over the review period.



2015/2014 Highlights

- ▶ 82.2% of Stay-over visitors came for recreation (**↑10.4%**).
- ▶ Business or conference stay-over arrivals grew significantly (**↑49.3%**).
- ▶ The average length of stay fell to 11 days (**↓1** day).
- ▶ Non-resident Barbadian visitors stayed twice as long as foreign national arrivals.
- ▶ Total cruise passenger arrivals increased to 711,400 (**↑3.6%**).
- ▶ Landed cruise passengers rose to 124,785 (**↑2.6%**).

Five Year Review

Introduction

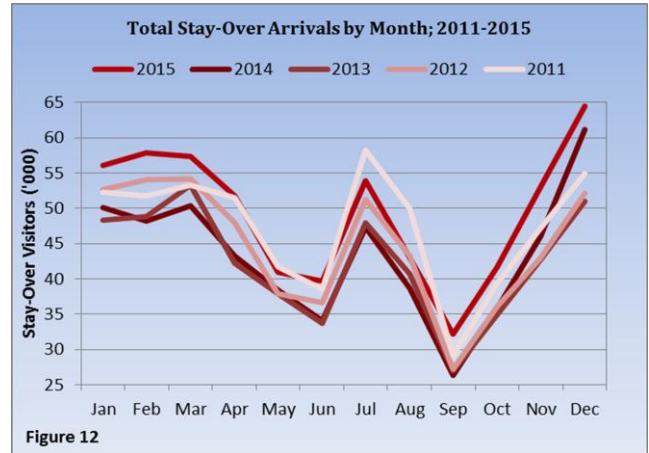
This section presents a concise report on visitor arrival trends for both stay-over and cruise arrivals over the period 2011-2015.

Stay-Over Arrivals

A rebound in the tourism sector of Barbados is clearly indicated by **Figure 11**, which shows that the island has returned to and surpassed levels of tourist arrivals previously achieved in 2011.

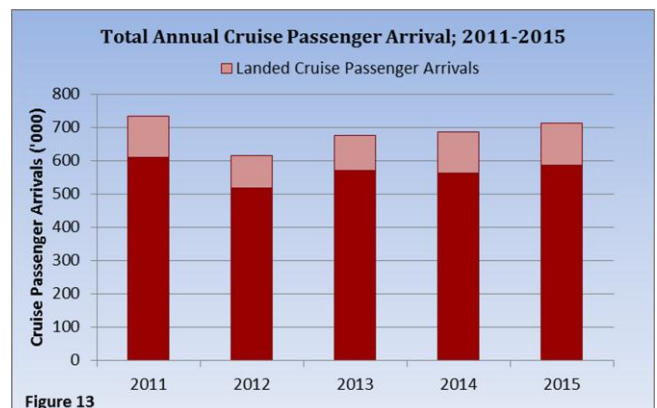


Monthly stay-over arrivals for the year 2015 outperformed 2011-2014 with the exception of the months of May, July and August, which were only led by the year 2011 (**Figure 12**). Over the period, 2015 and 2014 were the only years to record over 60,000 stay-over arrivals in a single month. This was achieved in the month of December for both 2015 (**64,458**) and 2014 (**61,128**).



Cruise Passenger Arrivals

Over the period 2012-2015, marginal to moderate increases were achieved year-over-year among cruise passenger arrivals ranging from **1.4%** for 2014/2013 to **9.6%** for 2013/2012. This level of growth however proved insufficient to move above the total of **732,013** cruise passengers, previously attained in 2011 (**Figure 13**). The proportion of landed passengers remained relatively constant over the period, ranging from **18.4%** in 2013 to **21.6%** in 2014.



Appendix

Table 1

Summary Of Main Indicators

| | | 2014 | 2015 | 2015/2014 Growth (%) |
|----------------------------------|------------------------------|-------------------------|-------------------------|-------------------------|
| Total Vistor Arrivals | | <u>1,204,243</u> | <u>1,303,272</u> | <u>8.2</u> |
| Stay-Over Vistor Arrivals | | <u>519,635</u> | <u>591,872</u> | <u>13.9</u> |
| Sex | Males | 248,123 | 281,516 | 13.5 |
| | Females | 271,505 | 310,353 | 14.3 |
| | <i>Not Stated</i> | 7 | 3 | |
| Age Group | 0-14 Years | 41,174 | 43,071 | 4.6 |
| | 15-44 Years | 210,598 | 244,622 | 16.2 |
| | 45-64 Years | 197,545 | 225,137 | 14.0 |
| | 65 Years and over | 70,315 | 79,040 | 12.4 |
| | <i>Not Stated</i> | 3 | 2 | |
| Nationality Status | Foreign Nationals | 489,630 | 562,894 | 15.0 |
| | Non-Resident Barbadians | 30,005 | 28,978 | -3.4 |
| Visitor Market | U.S.A | 118,510 | 148,067 | 24.9 |
| | Canada | 65,813 | 74,494 | 13.2 |
| | U.K | 186,858 | 214,175 | 14.6 |
| | Germany | 11,992 | 12,338 | 2.9 |
| | Other Europe | 32,744 | 28,514 | -12.9 |
| | Trinidad & Tobago | 27,915 | 29,659 | 6.2 |
| | Other CARICOM | 50,815 | 58,321 | 14.8 |
| | Other Countries | 24,988 | 26,304 | 5.3 |
| Purpose of Visit | Intransit | 9,260 | 9,953 | 7.5 |
| | Study | 4,594 | 4,441 | -3.3 |
| | Health Care | 1,469 | 1,457 | -0.8 |
| | Recreation | 440,473 | 486,344 | 10.4 |
| | <i>Holiday</i> | 395,402 | 439,139 | 11.1 |
| | <i>Visiting Friends etc</i> | 23,174 | 24,561 | 6.0 |
| | <i>Honeymoon/Get Married</i> | 5,843 | 7,037 | 20.4 |
| | <i>Sports</i> | 6,560 | 7,865 | 19.9 |
| | <i>Other Recreation</i> | 9,494 | 7,742 | -18.5 |
| | Business/Conference | 53,951 | 80,549 | 49.3 |
| | Other | 9,888 | 9,128 | -7.7 |
| | Cruise Liner Arrivals | | | |
| | Total Cruise Passengers | <u>684,608</u> | <u>711,400</u> | <u>3.9</u> |
| | Landed Passengers | 121,578 | 124,785 | 2.6 |
| | Cruise Liner Calls | <u>391</u> | <u>395</u> | <u>1.0</u> |

Table 2

Total Stay-Over Arrivals by Month of Arrival

| Year | Month | U.S.A | Canada | U.K | Germany | Other Europe | Trinidad & Tobago | Other CARICOM | Other Countries | ALL Countries |
|----------------------|----------------|---------------|----------------|----------------|---------------|---------------|-------------------|---------------|-----------------|----------------|
| 2015 | January | 10,783 | 10,595 | 20,994 | 1,732 | 3,856 | 1,538 | 4,364 | 2,263 | 56,125 |
| | February | 12,571 | 10,772 | 21,940 | 1,628 | 3,318 | 1,842 | 3,688 | 2,030 | 57,789 |
| | March | 14,097 | 9,564 | 20,768 | 1,850 | 2,597 | 1,995 | 4,443 | 2,071 | 57,385 |
| | April | 13,043 | 6,917 | 19,699 | 691 | 1,835 | 2,368 | 4,849 | 2,314 | 51,716 |
| | Winter | 50,494 | 37,848 | 83,401 | 5,901 | 11,606 | 7,743 | 17,344 | 8,678 | 223,015 |
| | May | 10,748 | 4,334 | 14,285 | 547 | 1,550 | 2,613 | 4,863 | 2,053 | 40,993 |
| | June | 12,518 | 3,302 | 11,977 | 509 | 1,561 | 2,325 | 4,870 | 2,625 | 39,687 |
| | July | 17,627 | 4,190 | 16,244 | 428 | 1,947 | 4,011 | 6,756 | 2,761 | 53,964 |
| | August | 12,422 | 3,399 | 13,128 | 587 | 1,789 | 3,580 | 6,098 | 1,924 | 42,927 |
| | September | 8,026 | 2,483 | 11,707 | 444 | 1,125 | 2,243 | 4,384 | 1,741 | 32,153 |
| | October | 9,520 | 4,600 | 15,968 | 541 | 1,787 | 2,409 | 4,989 | 1,874 | 41,688 |
| | November | 11,461 | 5,880 | 22,591 | 1,625 | 2,714 | 2,254 | 4,471 | 1,991 | 52,987 |
| | December | 15,251 | 8,458 | 24,874 | 1,756 | 4,435 | 2,481 | 4,546 | 2,657 | 64,458 |
| | Summer | 97,573 | 36,646 | 130,774 | 6,437 | 16,908 | 21,916 | 40,977 | 17,626 | 368,857 |
| Total | 148,067 | 74,494 | 214,175 | 12,338 | 28,514 | 29,659 | 58,321 | 26,304 | 591,872 | |
| Year | Month | U.S.A | Canada | U.K | Germany | Other Europe | Trinidad & Tobago | Other CARICOM | Other Countries | ALL Countries |
| 2014 | January | 9,498 | 8,348 | 18,134 | 1,403 | 5,097 | 1,724 | 3,894 | 2,024 | 50,122 |
| | February | 9,883 | 7,942 | 18,525 | 1,264 | 4,323 | 1,452 | 3,181 | 1,573 | 48,143 |
| | March | 9,899 | 7,804 | 19,450 | 1,540 | 3,634 | 2,307 | 3,588 | 2,099 | 50,321 |
| | April | 9,623 | 5,746 | 15,449 | 1,072 | 2,340 | 2,913 | 4,135 | 1,984 | 43,262 |
| | Winter | 38,903 | 29,840 | 71,558 | 5,279 | 15,394 | 8,396 | 14,798 | 7,680 | 191,848 |
| | May | 9,518 | 4,197 | 13,486 | 522 | 1,684 | 2,505 | 4,483 | 2,042 | 38,437 |
| | June | 10,295 | 2,945 | 10,538 | 437 | 1,539 | 2,364 | 4,231 | 1,781 | 34,130 |
| | July | 13,590 | 4,099 | 14,902 | 434 | 1,952 | 3,436 | 6,353 | 2,548 | 47,314 |
| | August | 9,354 | 3,244 | 12,736 | 477 | 1,748 | 3,826 | 5,148 | 2,122 | 38,655 |
| | September | 5,575 | 2,369 | 9,501 | 564 | 1,070 | 1,711 | 3,823 | 1,716 | 26,329 |
| | October | 7,222 | 3,842 | 14,319 | 593 | 1,730 | 1,863 | 4,143 | 2,080 | 35,792 |
| | November | 9,593 | 5,500 | 18,506 | 1,866 | 2,877 | 1,588 | 3,714 | 2,358 | 46,002 |
| | December | 14,460 | 9,777 | 21,312 | 1,820 | 4,750 | 2,226 | 4,122 | 2,661 | 61,128 |
| | Summer | 79,607 | 35,973 | 115,300 | 6,713 | 17,350 | 19,519 | 36,017 | 17,308 | 327,787 |
| Total | 118,510 | 65,813 | 186,858 | 11,992 | 32,744 | 27,915 | 50,815 | 24,988 | 519,635 | |
| Yr/Yr | Month | U.S.A | Canada | U.K | Germany | Other Europe | Trinidad & Tobago | Other CARICOM | Other Countries | ALL Countries |
| 2015/2014 Growth (%) | January | 13.5 | 26.9 | 15.8 | 23.4 | -24.3 | -10.8 | 12.1 | 11.8 | 12.0 |
| | February | 27.2 | 35.6 | 18.4 | 28.8 | -23.2 | 26.9 | 15.9 | 29.1 | 20.0 |
| | March | 42.4 | 22.6 | 6.8 | 20.1 | -28.5 | -13.5 | 23.8 | -1.3 | 14.0 |
| | April | 35.5 | 20.4 | 27.5 | -35.5 | -21.6 | -18.7 | 17.3 | 16.6 | 19.5 |
| | Winter | 29.8 | 26.8 | 16.6 | 11.8 | -24.6 | -7.8 | 17.2 | 13.0 | 16.2 |
| | May | 12.9 | 3.3 | 5.9 | 4.8 | -8.0 | 4.3 | 8.5 | 0.5 | 6.6 |
| | June | 21.6 | 12.1 | 13.7 | 16.5 | 1.4 | -1.6 | 15.1 | 47.4 | 16.3 |
| | July | 29.7 | 2.2 | 9.0 | -1.4 | -0.3 | 16.7 | 6.3 | 8.4 | 14.1 |
| | August | 32.8 | 4.8 | 3.1 | 23.1 | 2.3 | -6.4 | 18.5 | -9.3 | 11.1 |
| | September | 44.0 | 4.8 | 23.2 | -21.3 | 5.1 | 31.1 | 14.7 | 1.5 | 22.1 |
| | October | 31.8 | 19.7 | 11.5 | -8.8 | 3.3 | 29.3 | 20.4 | -9.9 | 16.5 |
| | November | 19.5 | 6.9 | 22.1 | -12.9 | -5.7 | 41.9 | 20.4 | -15.6 | 15.2 |
| | December | 5.5 | -13.5 | 16.7 | -3.5 | -6.6 | 11.5 | 10.3 | -0.2 | 5.4 |
| | Summer | 22.6 | 1.9 | 13.4 | -4.1 | -2.5 | 12.3 | 13.8 | 1.8 | 12.5 |
| Total | 24.9 | 13.2 | 14.6 | 2.9 | -12.9 | 6.2 | 14.8 | 5.3 | 13.9 | |

Table 3

Total Stay-Over Arrivals from CARICOM Market by Country

| CARICOM States | 2014 | 2015 | 2015/2014 Growth (%) |
|------------------------|---------------|---------------|---------------------------------|
| Trinidad & Tobago | 27,915 | 29,659 | 6.2 |
| <u>Other CARICOM</u> | <u>50,815</u> | <u>58,321</u> | <u>14.8</u> |
| Anguilla | 296 | 246 | -16.9 |
| Antigua | 3,922 | 4,687 | 19.5 |
| Bahamas | 957 | 1,222 | 27.7 |
| Belize | 470 | 546 | 16.2 |
| Dominica | 4,069 | 4,930 | 21.2 |
| Grenada | 4,101 | 4,984 | 21.5 |
| Guyana | 9,842 | 11,150 | 13.3 |
| Haiti | 224 | 196 | -12.5 |
| Jamaica | 7,367 | 7,855 | 6.6 |
| Montserrat | 194 | 190 | -2.1 |
| St Kitts & Nevis | 2,780 | 3,063 | 10.2 |
| St Lucia | 7,157 | 8,697 | 21.5 |
| St Vincent & the Gren. | 8,965 | 10,026 | 11.8 |
| Suriname | 471 | 529 | 12.3 |
| Total CARICOM | 78,730 | 87,980 | 11.7 |

Table 4

**Total Stay-Over Arrivals from CARICOM Market
by Month of Arrival**

| Month | 2014 | 2015 | 2015/2014 Growth (%) |
|--------------|---------------|---------------|---------------------------------|
| January | 5,618 | 5,902 | 5.1 |
| February | 4,633 | 5,530 | 19.4 |
| March | 5,895 | 6,438 | 9.2 |
| April | 7,048 | 7,217 | 2.4 |
| May | 6,988 | 7,476 | 7.0 |
| June | 6,595 | 7,195 | 9.1 |
| July | 9,789 | 10,767 | 10.0 |
| August | 8,974 | 9,678 | 7.8 |
| September | 5,534 | 6,627 | 19.8 |
| October | 6,006 | 7,398 | 23.2 |
| November | 5,302 | 6,725 | 26.8 |
| December | 6,348 | 7,027 | 10.7 |
| Total | 78,730 | 87,980 | 11.7 |

Table 5

Average Length of Stay for Stay-Over Arrivals

| | | 2014 | 2015 |
|--|-------------------------|---------------------|---------------------|
| <u>Total Stay-over Arrivals</u> | | <u>11.97</u> | <u>11.19</u> |
| Age Group | 0-14 Years | 12.64 | 12.26 |
| | 15-44 Years | 10.99 | 10.03 |
| | 45-64 Years | 10.72 | 10.12 |
| | 65+ Years | 18.02 | 17.26 |
| Nationality Status | Foreign Nationals | 11.22 | 10.58 |
| | Non-Resident Barbadians | 24.16 | 23.17 |
| Visitor Market | U.S.A | 10.66 | 9.63 |
| | Canada | 13.72 | 12.84 |
| | U.K | 12.33 | 11.67 |
| | Germany | 10.3 | 9.2 |
| | Other Europe | 11.33 | 11.15 |
| | Trinidad & Tobago | 10.33 | 9.75 |
| | Other CARICOM | 14.38 | 13.73 |
| | Other Countries | 9.44 | 8.5 |
| Month | January | 15.2 | 14.06 |
| | February | 11.07 | 10.15 |
| | March | 10.36 | 9.69 |
| | April | 10.31 | 9.56 |
| | May | 10.43 | 9.99 |
| | June | 11.48 | 10.43 |
| | July | 13.25 | 12.47 |
| | August | 12.87 | 12.48 |
| | September | 12.79 | 10.85 |
| | October | 11.3 | 10.4 |
| | November | 11.11 | 10.98 |
| | December | 12.9 | 12.47 |
| Season | Winter | 11.79 | 10.88 |
| | Summer | 12.02 | 11.39 |

Table 6

Total Cruise Passenger Arrivals by Month of Arrival

| Month | 2014 | 2015 | 2015/2014 Growth (%) |
|---------------|----------------|----------------|-------------------------|
| January | 111,474 | 105,907 | -5.0 |
| February | 100,678 | 92,799 | -7.8 |
| March | 90,861 | 90,367 | -0.5 |
| April | 58,673 | 66,919 | 14.1 |
| Winter | 361,686 | 355,992 | -1.6 |
| May | 25,511 | 23,554 | -7.7 |
| June | 18,219 | 24,543 | 34.7 |
| July | 28,059 | 25,247 | -10.0 |
| August | 18,879 | 21,614 | 14.5 |
| September | 21,912 | 23,455 | 7.0 |
| October | 31,827 | 36,169 | 13.6 |
| November | 74,830 | 93,210 | 24.6 |
| December | 103,685 | 107,616 | 3.8 |
| Summer | 322,922 | 355,408 | 10.1 |
| Total | 684,608 | 711,400 | 3.9 |

Table 7

Total Landed Cruise Passenger Arrivals by Month of Arrival

| Month | 2014 | 2015 | 2015/2014 Growth (%) |
|---------------|----------------|----------------|-------------------------|
| January | 27,530 | 27,668 | 0.5 |
| February | 22,811 | 24,518 | 7.5 |
| March | 21,528 | 19,748 | -8.3 |
| April | 5,468 | 3,294 | -39.8 |
| Winter | 77,337 | 75,228 | -2.7 |
| May | 897 | 631 | -29.7 |
| June | 779 | 604 | -22.5 |
| July | 674 | 662 | -1.8 |
| August | 610 | 614 | 0.7 |
| September | 654 | 518 | -20.8 |
| October | 831 | 543 | -34.7 |
| November | 19,482 | 20,772 | 6.6 |
| December | 20,314 | 25,213 | 24.1 |
| Summer | 44,241 | 49,557 | 12.0 |
| Total | 121,578 | 124,785 | 2.6 |

Table 8

Monthly Stay-Over Visitor Arrivals by Year

| Month | 2011 | 2012 | 2013 | 2014 | 2015 | 2011-2015 |
|---------------|----------------|----------------|----------------|----------------|----------------|-----------|
| January | 52,194 | 52,619 | 48,288 | 50,122 | 56,125 | |
| February | 51,793 | 54,056 | 48,870 | 48,143 | 57,789 | |
| March | 53,257 | 54,164 | 53,304 | 50,321 | 57,385 | |
| April | 51,442 | 47,979 | 42,234 | 43,262 | 51,716 | |
| Winter | 208,686 | 208,818 | 192,696 | 191,848 | 223,015 | |
| May | 41,699 | 37,935 | 37,906 | 38,437 | 40,993 | |
| June | 38,490 | 36,656 | 33,691 | 34,130 | 39,687 | |
| July | 58,237 | 51,253 | 47,935 | 47,314 | 53,964 | |
| August | 49,961 | 43,191 | 40,667 | 38,655 | 42,927 | |
| September | 29,144 | 27,230 | 26,970 | 26,329 | 32,153 | |
| October | 39,358 | 36,071 | 34,938 | 35,792 | 41,688 | |
| November | 47,208 | 42,975 | 42,690 | 46,002 | 52,987 | |
| December | 54,941 | 52,174 | 51,027 | 61,128 | 64,458 | |
| Summer | 359,038 | 327,485 | 315,824 | 327,787 | 368,857 | |
| Total | 567,724 | 536,303 | 508,520 | 519,635 | 591,872 | |

Table 9

Annual Stay-Over Arrivals by Purpose of Visit; 2011-2015

| Month | 2011 | 2012 | 2013 | 2014 | 2015 | 2011-2015 |
|------------------------------|----------------|----------------|----------------|----------------|----------------|-----------|
| Intransit | 25,072 | 10,881 | 11,861 | 9,260 | 9,953 | |
| Study | 5,213 | 5,493 | 4,888 | 4,594 | 4,441 | |
| Health Care | 1,595 | 1,482 | 1,489 | 1,469 | 1,457 | |
| Recreation | 464,018 | 451,377 | 427,048 | 440,473 | 486,344 | |
| <i>Holiday</i> | 409,602 | 400,736 | 382,536 | 395,402 | 439,139 | |
| <i>Visiting Friends etc.</i> | 30,762 | 27,915 | 25,125 | 23,174 | 24,561 | |
| <i>Honeymoon/Get Married</i> | 9,497 | 8,612 | 6,810 | 5,843 | 7,037 | |
| <i>Sports</i> | 9,188 | 6,845 | 5,960 | 6,560 | 7,865 | |
| <i>Other Recreation</i> | 4,969 | 7,269 | 6,617 | 9,494 | 7,742 | |
| Business/Conference | 59,026 | 56,382 | 52,867 | 53,951 | 80,549 | |
| Other | 14,196 | 10,768 | 10,361 | 9,888 | 9,128 | |
| Total | 569,120 | 536,383 | 508,514 | 519,635 | 591,872 | |

Table 10

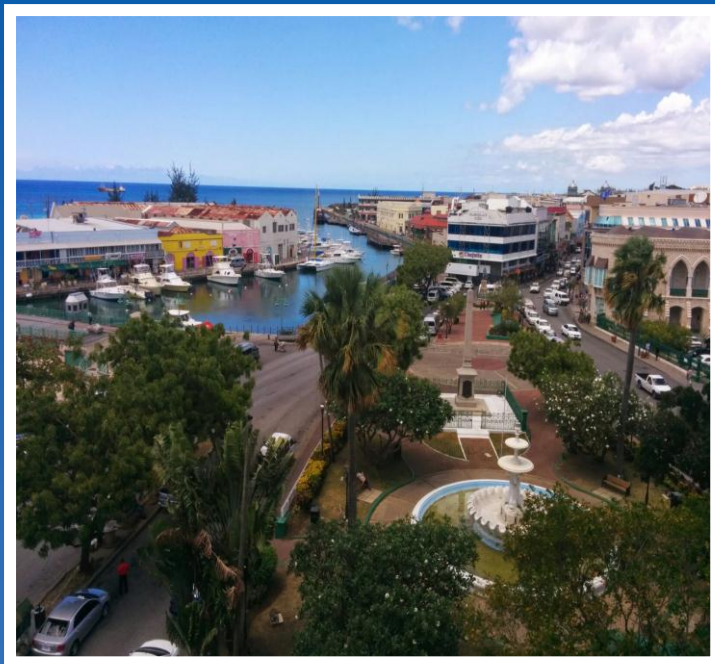
Monthly Total Cruise Passenger Arrivals by Year

| Month | 2011 | 2012 | 2013 | 2014 | 2015 | 2011-2015 |
|---------------|----------------|----------------|----------------|----------------|----------------|-----------|
| January | 84,607 | 81,412 | 93,132 | 111,474 | 105,907 | |
| February | 82,757 | 77,447 | 74,833 | 100,678 | 92,799 | |
| March | 81,081 | 75,956 | 82,926 | 90,861 | 90,367 | |
| April | 90,532 | 51,067 | 45,817 | 58,673 | 66,919 | |
| Winter | 338,977 | 285,882 | 296,708 | 361,686 | 355,992 | |
| May | 16,073 | 16,853 | 19,983 | 25,511 | 23,554 | |
| June | 21,701 | 13,038 | 18,658 | 18,219 | 24,543 | |
| July | 18,056 | 13,256 | 24,868 | 28,059 | 25,247 | |
| August | 22,334 | 15,895 | 21,170 | 18,879 | 21,614 | |
| September | 15,755 | 11,781 | 19,182 | 21,912 | 23,455 | |
| October | 21,557 | 25,726 | 26,433 | 31,827 | 36,169 | |
| November | 71,887 | 60,015 | 63,997 | 74,830 | 93,210 | |
| December | 83,504 | 74,990 | 79,264 | 103,685 | 107,616 | |
| Summer | 270,867 | 231,554 | 273,555 | 322,922 | 355,408 | |
| Total | 609,844 | 517,436 | 570,263 | 684,608 | 711,400 | |

Table 11

Monthly Landed Cruise Passenger Arrivals by Year

| Month | 2011 | 2012 | 2013 | 2014 | 2015 | 2011-2015 |
|---------------|----------------|---------------|----------------|----------------|----------------|-----------|
| January | 24,550 | 24,020 | 19,395 | 27,530 | 27,668 | |
| February | 24,601 | 21,877 | 22,488 | 22,811 | 24,518 | |
| March | 20,824 | 19,446 | 18,475 | 21,528 | 19,748 | |
| April | 7,439 | 4,827 | 3,954 | 5,468 | 3,294 | |
| Winter | 77,414 | 70,170 | 64,312 | 77,337 | 75,228 | |
| May | 1,668 | 598 | 681 | 897 | 631 | |
| June | 809 | 472 | 558 | 779 | 604 | |
| July | 615 | 834 | 749 | 674 | 662 | |
| August | 1,196 | 448 | 646 | 610 | 614 | |
| September | 848 | 494 | 614 | 654 | 518 | |
| October | 1,233 | 641 | 774 | 831 | 543 | |
| November | 16,720 | 9,486 | 16,402 | 19,482 | 20,772 | |
| December | 21,666 | 15,389 | 20,227 | 20,314 | 25,213 | |
| Summer | 44,755 | 28,362 | 40,651 | 44,241 | 49,557 | |
| Total | 122,169 | 98,532 | 104,963 | 121,578 | 124,785 | |



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