

Tourism Supply in the Caribbean Region

Ref: 11200
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A Study for the World Bank

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Report No.: 11200 Type: (MIA)
Title: TOURISM SUPPLY IN THE CARIBBEAN
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NOVEMBER 1974

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**TOURISM SUPPLY
IN THE
CARIBBEAN REGION**

**A Study for the World Bank
by the Shankland Cox Partnership**

November 1974

TOURISM SUPPLY STUDY - CARIBBEAN REGION

INTRODUCTION

This study of the supply of tourism facilities in the Caribbean was commissioned by the World Bank (International Bank for Reconstruction and Development) in early 1973. The Shankland Cox Partnership was appointed to carry out the survey, with Miss Jill Rawson as the project leader.

The field work for the report was carried out during May, June and part of July 1973. The islands visited were Bermuda, The Bahamas, Turks and Caicos Islands, Puerto Rico, U.S. Virgin Islands, British Virgin Islands, St. Kitts-Nevis, Antigua, Dominica, St. Lucia, Barbados, Grenada, St. Vincent, and the Cayman Islands. Approximately four days were spent in each island during which time answers to a basic questionnaire were obtained; information was collected from the government, private agencies and individuals. Data for Jamaica, the Dominican Republic, Trinidad and Tobago, Martinique, Guadeloupe, the Netherlands Antilles and Haiti were obtained through the office of the Shankland Cox Partnership in these islands and/or from material available to the World Bank. The islands listed above constitute 'the Caribbean Region' as defined for purposes of this study.

The data were considered to be sufficiently comprehensive for the World Bank to request that the Consultants formulate some overall conclusions about the past, present and future development of the tourism sector in the Caribbean. The first part of the study contains these comments and conclusions on the sector as a whole; the second part contains the statistical data, island by island, under each research topic.

While every effort has been made to ensure comparability and consistency, weaknesses inherent in the data often thwarted these attempts. Also, only rarely has it been possible to add more recent data to that collected by the Consultants in 1973, so that some of the information may be out of date.

The World Bank considers the study useful primarily as a working document for regional organisations, governments, development agencies and tourist associations in the Caribbean. Therefore, within the context of budget and time constraints, a more polished presentation has been sacrificed in the interests of speedier publication.

While the World Bank commissioned the study and assisted in its organization, responsibility for the views and data contained in the report is that of the Shankland Cox Partnership alone.

signed: Charles Bosel
Shankland Cox

TOURISM SUPPLY STUDY - CARIBBEAN REGION

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TOURISM SUPPLY STUDY - CARIBBEAN REGION

SUMMARY AND CONCLUSIONS

Existing Tourist Accommodation

There were 65,000 rooms in tourist accommodation in the Caribbean in 1972: 48,000 in motels, 3,000 in guest houses and 14,000 in villas and apartments. Annual average growth rates between 1968 and 1972 are estimated at 10.5% for the region. The fastest growth occurred in cottages and apartments, which expanded by an average of 21% per annum. Hotel rooms increased by 8% and guest house rooms by 3.5% per annum over the period. The two outstanding trends in the development of Caribbean tourist accommodation since 1968 have been growth in the amount of self-catering accommodation and the increase in the average size of hotels. A classification indicative of facilities, quality of service, style and size of hotel is needed for the visitor, as well as for the internal organization of the hotel industry in the Caribbean. Hotel ownership in the Caribbean is typically local for small hotels and guest houses, and foreign for large hotels.

Visitors and Visitor Characteristics

The entry and departure cards (E/D cards) issued to all visitors to foreign territories are a most useful source of information about tourists. The standard card used by most Caribbean islands should be modified so that it can be processed easily to provide the maximum amount of relevant information. A recommended format for such cards is included in this report. An estimated 3.5 million stopover visitors travelled to the Caribbean in 1972, compared with an estimated 3.2 million in 1968. Approximately 50% of visitors to the region in 1972 went to The Bahamas and Puerto Rico. The number of stopover visitors has increased at an estimated annual average rate of 8.5% since 1968. Therefore tourist accommodation, which increased at a rate of 10.5% a year in the same period, has been expanding more rapidly than tourist arrivals. (Unfortunately, growth rates in bednights cannot be calculated from the available data.) Annual growth rates were 15.8% in 1969, 1.6% in 1970, 8.3% in 1971 and 9.9% in 1972. By 1972 then the region had recovered from the 1969-70 depression, attributed to slower economic growth in the U.S.A. and competition from other tourist regions, but has not yet recaptured the high growth rates experienced in the 1960s. The high season lasts from mid-December to mid-April. Since 1968, an increase in visitor arrivals in July and August has helped reduce the seasonal imbalance in many islands. The monthly distribution of visitors is uneven but the slackest months almost everywhere are September to November.

Roughly 85% of visitors to the Caribbean are tourists. The region caters mainly to the wealthy, but is attracting an increasingly large proportion of middle-income tourists, particularly on group inclusive tours from North America. Accommodation and transport facilities are being planned, particularly in the Eastern Caribbean, for package tourists from Europe. Over 80% of visitors were from North America in 1972, compared with 5% from Europe and 4% from Central or South America. Given its proximity to the Caribbean, Latin America represents an important tourist generating region for the future. Some 9% of visitors in 1972 were from the Caribbean region itself. Domestic tourism is significant only in Jamaica and Puerto Rico.

Length of stay is decreasing for some islands from the current average of between 5 and 8 nights. Nearly all stopover visitors to the Caribbean arrive by air. Cruise ship passengers are numerous and their number is growing.

Hotel Occupancy Rates

An estimated 70% of stopover visitors use recognised hotels and guest houses. Hotel bed occupancy rates were low in 1972 (below 60% everywhere but Bermuda). Bed occupancy rates have fallen significantly since 1968 when all major resort areas experienced annual rates above 60%. This trend reflects the slower growth of visitor arrivals compared with the more rapid growth of accommodation since 1968.

Evaluation of Tourism Programmes

Excluding Haiti and The Bahamas, for which no information is available, some 7,600 rooms in resort accommodation are presently under construction in the Caribbean. The 6,900 hotel rooms currently under construction will increase existing hotel accommodation in the respective islands by 18%. The 700 rooms under construction in cottages and apartments will increase existing self-catering accommodation by 22.4%. Information about cottage and apartment construction is clearly incomplete and understates the actual total. The average size of new hotels under construction, including extensions, is 130 rooms, which is double the average size of existing hotels.

Construction of some 9,800 rooms in resort accommodation is under serious consideration and 9,100 would be in hotels. However, self-catering accommodation is bound to be significantly underestimated. Projects under less serious consideration include 35,600 new rooms in a number of large scale, tourism complexes designed to receive European package tourists.

Foreign Exchange and Expenditures

Average daily expenditure varies from about \$20 in Haiti to \$70 in the U.S. Virgin Islands. Expenditure per visit varies from about \$180 in Haiti to \$260 in The Bahamas. Accommodation and food is the major item of expenditure, accounting for between 44% and 70% of stopover visitor's expenditures. Hotel guests tend to spend more than cruise ship passengers,

visitors to friends and relatives, or persons occupying self-catering accommodation. Visitors from the U.S.A. and Latin America tend to spend more per day than the average, whereas visitors from Canada and the United Kingdom spend more per visit. Survey material from Jamaica shows that package tourists spend less per visit than do non-package visitors, but, surprisingly, package tourists spend more per day than non-package visitors. Expenditure data are inadequate for testing the hypothesis that visitor expenditure has been declining in recent years. Leakage estimates (defined as the percentage of tourism revenues repatriated in the first round of expenditures by the recipients) are available for a few territories only; in all cases, leakage is equal to less than 50% of total visitor expenditure.

Employment

Direct employment in tourist accommodation in The Bahamas, Barbados, Bermuda, Jamaica and Puerto Rico, which account for two thirds of the Region's tourist accommodation, amounts to approximately 40,000 persons, giving an average employee-per-room ratio of 1.0 - 1.1:1.0. Elsewhere, employee-per-room ratios appear to be slightly lower. Total employment in tourist accommodation for the region is estimated at between 55,000 and 65,000 persons. Employee-per-room ratios are diminishing in some islands, but there is no evidence that this decline is related to increased efficiency. Worker productivity is low compared with that on the U.S. mainland and hotel training in the Caribbean, particularly at the managerial level, requires drastic improvement. Unemployment in the slack season varies from 11% in Puerto Rico to as much as 37% in Barbados.

Wage rates seem to decrease as distance from the U.S. mainland increases. Thus, maids, bellboys and waiters may earn \$50 a week in Bermuda and in the U.S. Virgin Islands, but only \$8 a week in St. Vincent and Dominica. Trade unions have established minimum wage rates in hotels in a number, but not all, islands.

Incentives

All territories except Bermuda have incentive legislation, which gives hotel developers concessions on import duties and taxes. In general, the laws do not authorize governments, sufficient authority to appraise projects and ensure that new construction is in accord with the public interest.

The Social Impact of Tourism

Research is needed into the social impact of tourism. Improved statistics on visitor characteristics, attitudes and behaviour are required. Changes in education systems to meet the requirements of the tourism industry, and the influence of formal and informal education on values and attitudes towards tourism also require study. Indicators of the social consequences of tourism need to be identified, and measured. Policies to reduce any negative social consequences of tourism can only be evolved based on such research.

Transportation and the Construction Industry

Inter-island communication patterns and the construction industry require further study.

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 1. EXISTING TOURIST ACCOMMODATION

1.1 Statistics and Definitions

Existing tourist accommodations were classified as hotels (including apartment hotels), guest houses, cottages or apartments. Hotels providing both rooms and apartments were categorized as apartments. Establishments with fewer than ten bedrooms and self-styled "guest houses" were classified as guest houses. Accommodation is estimated in terms of rooms in some islands and in terms of beds in others. To aid comparison, two beds were assumed for each hotel room. Similarly, apartment and guest house data often show only the number of establishments. Cottages and apartments generally contain between two and nine beds, in one or two bedrooms, so the rather arbitrary assumption was made of an average of four beds per cottage or apartment.

Statistics relating to numbers of hotels and hotel rooms are fairly reliable, although in some islands there are small establishments, probably not recognised by tourist boards, which have accommodation for rent. This is probably also true for guest houses. The data on self-catering accommodation are much less reliable, as all islands contain private accommodation not known to tourist boards. Many islands, including Puerto Rico, do not attempt to estimate the amount of such accommodation. Puerto Rico contains a great deal of condominium development and, while authorities may know how much accommodation exists, they do not know what is available for rent nor specifically, how much is rented by tourists.

1.2 Available Accommodation in 1972

Statistics relating to total accommodation in hotels and guest houses (except for the Netherlands Antilles) are shown in Table 1H. From 1971 data it was assumed that accommodation in the Netherlands Antilles could raise the total of some 47,500 rooms in hotels and guest houses to 51,000, of which 48,000 rooms might be in hotels and 3,000 in guest houses. Information about cottages and apartments in Trinidad and Tobago, Guadeloupe, Martinique and the Netherlands Antilles was not available for 1972. When estimates for these territories are added to the total of some 12,000 rooms in the rest of the area, the number of rooms in cottages and apartments for the region is approximately 14,000 in 1972. Supply data for the whole Caribbean in 1972 are summarized below.

TABLE 1A: TOURIST ACCOMMODATION - 1972

<u>Accommodation</u>	<u>Rooms Number</u>	<u>Beds Number</u>	<u>Distribution Percent</u>
Hotels	48,000	96,000	74.0
Guest houses	3,000	6,000	4.5
Apartment/cottages	14,000	28,000	21.5
Total	65,000	130,000	100.0

1.3 Growth of Accommodation

The annual average growth rate in tourist accommodation from 1968 to 1972 is estimated at about 10.5%. The estimate is crude because it is based on partial data for 1968 and incomplete data for 1972. Hotels have expanded by 8% per annum on average and rooms in cottages and apartments by about 21%. Table 1B shows annual growth rates for different types of accommodation based on data in Tables 1D to 1H.

TABLE 1B: ESTIMATED ANNUAL GROWTH RATES IN TOURIST
ACCOMMODATION (ROOMS) - 1968 to 1972

<u>Year</u>	<u>Hotels</u>	<u>Guest houses</u>	<u>Cottages/apartments</u>
1968-69	6.9	13.3	23.4
1969-70	13.9	5.5	24.7
1970-71	5.1	11.2	7.2
1971-72	5.7	1.4	30.6
Average 1968-72	8.0	3.5	21.0

1.4 Inter Island Comparison

The distribution of accommodation among hotels, guest houses and self-catering units is shown in Table 1D to 1H. Hotels provide the overriding majority of tourist accommodation in Antigua, Dominican Republic and St. Lucia, as well as in the metropolitan centres of The Bahamas and Jamaica, (i.e., Nassau and Kingston). Guest houses account for a significant proportion of tourist accommodation in the less developed islands, such as Dominica, Grenada,

Haiti, St. Kitts and the Turks and Caicos Islands. Barbados and Bermuda, the traditional tourist centres, also have a large proportion of accommodation in guest houses. Elsewhere guest houses have been replaced by hotels or self-catering accommodation. In the less developed islands, where owning and operating tourist accommodation entails greater risk, the family guest house still performs a useful function.

Self-catering accommodation comprises more than one third of all tourist accommodation in the Family Islands of The Bahamas; in Ocho Rios and Port Antonio in Jamaica; in the U.S. and British Virgin Islands, the Cayman Islands and in Montserrat and Grenada, where there are many villas for rent on recent subdivisions. In most Caribbean Islands, self-catering accommodation is provided in cottages or villas. Condominia have been built principally in Puerto Rico and Freeport in The Bahamas and are also developing in Jamaica and Barbados. Antigua recently passed a Condominium Law. Apartment hotels are fairly common in the Caribbean, notably in the U.S. Virgin Islands, Barbados and Jamaica. Bermuda has long provided "cottage colonies", which are similar in concept to the apartment hotel.

Table 1J demonstrates the remarkable growth in the region's hotel accommodation between 1968 and 1972. The fastest growth occurred in the Eastern Islands, and was caused in St. Lucia by the construction of several large, modern hotels, and in Dominica and Grenada by the addition of small hotels to a low 1968 base. High growth rates were also experienced in the Cayman Islands, where a hotel with more than 100 rooms was opened; in the Netherlands Antilles, which added some 1,600 rooms; and in Jamaica, which built 18 hotels containing 2,771 rooms. During the same period, Puerto Rico and Bermuda added almost 1,000 rooms each, and St. Lucia, 800. Slow growth rates are evident in Barbados, Puerto Rico and Antigua. Bermuda, in spite of planning controls, has maintained a fairly high average annual rate of increase of 10.0% per annum.

Growth rates in cottage and apartment accommodation can be calculated only for a few islands. Jamaica's rapid growth in hotel rooms has been accompanied by an even faster rate of increase in self-catering accommodation. The main growth sector in Barbados was cottages and apartments, with an average annual increase of 18.0% for the period 1968-72. Grenada, where there has been a significant amount of real estate development recently, shows the greatest average annual increase in self-catering accommodation, reflecting a growth in villas for rent. The Cayman Islands also experienced fast growth from 1968-72 (18% per annum), while Bermuda and St. Vincent averaged 13% and 14% per annum respectively. The advantage of building additional self-catering accommodation seems to lie in the ready demand for it. However, expenditures of visitors to cottages and apartments are usually lower than those of conventional hotel visitors. Moreover hotels tend to generate more jobs than apartments or cottages. A study to ascertain the merits and demerits of different types of tourist accommodation would be useful.

A characteristic feature of tourist accommodation in the Caribbean is the great number of small hotels (see Table 1K). These are most common in the Eastern Caribbean, where old sugar plantation houses and other old dwellings have been converted into attractive accommodation. Average hotel size is largest in islands with most tourist development, such as Puerto Rico, Bermuda, the established popular resorts of The Bahamas (Nassau and Freeport) and in Ocho Rios in Jamaica. Hotels in Jamaica, the U.S. Virgin Islands and Martinique average 60-70 rooms; an average size that tends to indicate a mixture of large and small hotels. Hotels with fewer than 50 rooms predominate in other islands. The average size of hotels in Haiti, Barbados, and Trinidad and Tobago is small, although the islands contain a substantial number of hotel rooms.

1.5 Hotel Classification

There is no generally accepted hotel classification system prevailing in the Caribbean. Through its hotel association, Antigua has introduced criteria to classify hotel accommodation as "superior," "standard" and "moderate," according to the facilities available, quality of service and size of hotel. The Netherlands Antilles distinguish between luxury hotels, first class hotels, commercial hotels and others; but the classification is not defined. Martinique uses the French '4', '3', '2', and '1' Star hotel classification system. The Statistical Service, Hotel Association, and Tourist Board in Barbados all classify hotels as 'A' or 'B', the only determining factor seems to be bednight charges. The system has been designed solely for internal purposes and is used mainly for statistical analysis and in formulating wage agreements between hotel employers and trade unions. About two years ago the Jamaica Hotel and Tourist Association introduced a hotel guide that rates each hotel with one, two, or three stars according to the quality of its food and service and the facilities offered. The illustrated guide gave the tourist an immediate impression of the main assets of each hotel.

Hotel and tourist representatives in most islands spoke favourably of introducing a hotel classification system. In the small islands evaluation by an external agency was favoured in order to gain the support of local hoteliers, who tend to be highly competitive. Two conflicting objections were raised to the concept of hotel classification. Hoteliers in Bermuda and The Bahamas commented that part of the charm of their islands is the variety of accommodation offered by several different but equally comfortable types of hotel. In contrast, hoteliers in some small Eastern Caribbean islands considered a classification system to be unnecessary because the hotels were quite similar. Adoption of a uniform system within the region would seem to have many advantages. At present, the Caribbean Hotel Association has no plans to introduce any form of classification. However the classification system should be not only standard for all islands, but also related to international standards to provide the foreign visitor with an indication of the type of accommodation available. It should be emphasised however that hotel classification aids the statistician, planner, promoter and hotel employees as well as the visitor.

1.6 Local and Foreign Ownership of Hotels

A necessarily superficial impression, given very limited data (see Table 1M), is that local ownership in the Caribbean is concentrated in small hotels and guest houses. For example, the figures from the Cayman Islands and Antigua indicate a greater proportion of local ownership of entire hotels than of hotel rooms. Information from St. Lucia and Antigua suggests that the average size of locally owned hotels is much smaller than the average for all hotels. All guest houses in Antigua and Barbados are locally owned. The following survey conducted by C. Crocco in Barbados revealed more local ownership of moderate than luxury hotels.

TABLE 1C: OWNERSHIP OF HOTELS IN BARBADOS - 1971

<u>Category of Accommodation</u>	<u>No. of Hotels</u>		<u>Percent Locally Owned</u>
	<u>Locally Owned</u>	<u>Foreign Owned</u>	
Luxury Hotels	3	10	23
Class 'A' Hotels	3	8	27
Class 'B' Hotels	6	5	55
Class 'C' Hotels	2	1	67
Apartment Hotels	20	12	63
Guest houses	10	-	100

The percentage of locally owned hotel beds in Bermuda between 1969 and 1972 was as follows:

1969	-	44.2%
1970	-	46.4%
1971	-	40.8%
1972	-	46.8%

In many Caribbean territories hotel ownership by locals is a sensitive issue. Since local businessmen are unable to provide capital on a large enough scale, the level of foreign ownership seems likely to increase with the tendency to build larger hotels and tourism complexes. Measures to increase local participation in new large-scale tourism projects are required. The problems generally involve management, marketing and ownership. Management and marketing pose the more formidable problems, particularly where large hotels are concerned. Foreign entrepreneurs and especially the large chains are often favoured because they can combine the requisite level of management expertise and financial resources, with a highly experienced and aggressive marketing organisation. Participation by locals in management could be promoted by training, increasing the attractiveness of career structures in the hotel industry, and developing year-round tourism to avoid seasonal unemployment. Marketing of small and/or local hotels is difficult and there is little doubt that large chains enjoy a competitive advantage and economies of scale, by virtue of the world-wide distribution of their outlets. Even a foreign hotelier operating a single hotel experiences difficulties in marketing.

As this is a familiar problem in other services such as retail distribution, the way in which small retailers have tackled their problems could provide answers for the hotel industry. A group of individual hoteliers on different islands might well form themselves into a chain for marketing purposes. This cooperation could be extended in many ways even to bulk buying of furniture and equipment.

Local ownership can be considered in two forms: (a) equity participation by holding common stock in a hotel company. Over time, substantial or majority share holding by local residents could be achieved by institutional reforms of the kind that already have been carried out in relation to other sectors, such as banking and insurance, in a number of the more developed countries in the region. Provided this is sensibly phased, the cooperation of foreign investors would probably be gained, and in many cases such an approach would be welcomed; (b) a more positive form, already occurring on a small localised scale involves the financing, development and management of tourist projects, which requires both initiative on the part of local entrepreneurs and financial support from Governments or local or regional institutions. Clearly, the capability of the entrepreneur to manage and promote the project is a crucial factor in attracting financing.

The development of vacation villages composed of a number of small separately owned accommodation units with centralised, communal facilities is much under discussion. However there is an obvious need for further study of such a project given the complexity of providing and operating centralised facilities. To some extent condominium developments help overcome the problem of predominantly foreign ownership. Some islands have encouraged local participation in the sector by excluding or discouraging foreign investment in small enterprises most likely to attract local capital, e.g., Bermuda does not permit foreigners to establish hotels with fewer than 50 rooms. However the main difficulty seems to be in promoting local involvement in large- rather than small-scale tourist enterprises. In addition to the financial and technical problems, local attitudes towards tourism and risk-taking can act as disincentives to local investment in accommodations in the Caribbean. As one example, the U.S. Virgin Islands contain a high proportion of wealthy local residents, but only 10% of investment in hotels is by Virgin Islanders and is confined to small hotels, guest houses and only two of the many large hotels.

TABLE 1D

Caribbean region - 1968. NUMBER OF ESTABLISHMENTS, ROOMS, BEDS IN RESORT ACCOMMODATION BY TYPE OF ACCOMMODATION AND COUNTRY

	Hotels		Guest Houses		Cottages/Apts		Not Classified		Total	
	Establs	Rooms	Establs	Rooms	Establs	Rooms	Establs	Rooms	Rooms	Beds
Antigua	28	899	8	55	110	NA				
Bahamas			NA							
Barbados	49	1,947	3,746	11	97	176	680	1,528	2,724	5,450
Bermuda	16	2,010	4,019	18	285	570	172	1,350	3,088	6,175
British Virgin Islands	9	188	356	5	31	62	NA			
Cayman Islands	9	216	432	1	7	14	159	318	382	764
Dominica	4	50	100	7	25	50	NIL		75	150
Dominican Republic		1,196	2,392	NIL			NIL		1,196	2,392
Grenada		242	484		50	100	83	164		
Guadeloupe	16	668	1,336	4	31	62			375	748
Haiti				NA						
Jamaica	88	3,764	7,350	27	182	364	261	983	4,930	9,616
Montserrat	4	48	96	1	3	6	NA			
Netherlands Antilles		1,934	3,868							
Puerto Rico	60	8,054	16,108	35	365	730	NA			
St. Kitts				NA						
St. Lucia									286	572
St. Vincent	16	236	441	3	30	42	30	60	326	563
Trinidad & Tobago				NA						
Turks & Caicos Islands				NA						
U.S. Virgin Islands				NA						

TABLE 1E

Caribbean region - 1969.

NUMBER OF ESTABLISHMENTS, ROOMS, BEDS IN RESORT ACCOMMODATION BY TYPE OF ACCOMMODATION AND COUNTRY

	Hotels			Guest Houses			Cottages/Apts			Not Classified			Total	
	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Rooms	Beds
Antigua	28	944	1,888	NA										
Bahamas				NA										
Barbados	48	2,023	3,973	12	113	213	435	777	1,574				3,178	6,290
Bermuda				NA									3,123	6,245
British Virgin Islands	9	188	356	5	31	62	NA							
Cayman Islands	9	216	432	1	7	14	184		368				407	814
Dominica	5	83	165	7	25	50	NA							
Dominican Republic	1,242			2,484									1,242	2,484
Grenada	332			664			65		130	253		506	650	1,300
Haiti							NA							
Jamaica	95	4,352	8,413	29	190	374	358	1,113	2,163				5,655	10,950
Montserrat	4	48	96	2	7	14	NA							
Netherlands Antilles	2,257			4,514										
Puerto Rico	58	8,123	16,246	39	421	842	NA							
St Kitts							NA							
St Lucia				NA			16		32				336	672
St Vincent	19	260	492	5	48	74	NA							
Trinidad & Tobago	32	1,528	3,056	6	143	286	NA							
Turks & Caicos Islands							NA							
U.S. Virgin Islands	67	2,917	5,745	21	191	378	237	373	641	118		239	3,599	7,003

TABLE 1F

Caribbean region - 1970 . NUMBER OF ESTABLISHMENTS, ROOMS, BEDS IN RESORT ACCOMMODATION BY TYPE OF ACCOMMODATION AND COUNTRY

	Hotels			Guest Houses			Cottages/Apts			Not Classified			Total	
	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Rooms	Beds
Antigua	31	1,051	2,102	8	40	80	28	40	80				1,131	2,262
Bahamas	90	9,317	18,634	28	236	472	376	757	1,514				10,310	20,620
Barbados	50	2,103	4,200	12	115	230	827	1,108	2,442		64	128	3,390	7,000
Bermuda							NA						3,420	6,840
British Virgin Islands	10	210	420	6	36	72	28	56	100				302	592
Cayman Islands	9	216	432	1	7	14		217	434				440	880
Dominica	5	90	180	7	25	50	NA							
Dominican Republic		1,442	2,884										1,442	2,884
Grenada		485	970		65	130		250	500				800	1,600
Haiti							NA							
Jamaica	103	5,472	10,760	29	227	406	408	1,327	2,592				7,026	13,758
Martinique		1,030	2,060											
Montserrat	5	58	116	3	13	26	70	140	280				211	422
Netherlands Antilles		2,856	5,712											
Puerto Rico	60	8,529	17,058	40	434	868	NA							
St Kitts							NA							
St Lucia			NA					40	80				560	1,120
St Vincent	21	339	619	5	48	76	NA							
Trinidad & Tobago	32	1,528	3,056	6	143	286	NA							
Turks & Caicos Islands							NA							
U.S. Virgin Islands	61	3,286	6,510	31	408	816	567	746	1,509				4,439	8,835

Caribbean region - 1971.
TABLE 10
NUMBER OF ESTABLISHMENTS, ROOMS, BEDS IN RESORT ACCOMMODATION BY TYPE OF ACCOMMODATION AND COUNTRY

	<u>Hotels</u>			<u>Guest Houses</u>			<u>Cottages/Apts</u>			<u>Not Classified</u>			<u>Total</u>	
	<u>Estabs</u>	<u>Rooms</u>	<u>Beds</u>	<u>Estabs</u>	<u>Rooms</u>	<u>Beds</u>	<u>Estabs</u>	<u>Rooms</u>	<u>Beds</u>	<u>Estabs</u>	<u>Rooms</u>	<u>Beds</u>	<u>Rooms</u>	<u>Beds</u>
Antigua	32	1,027	2,062	8	40	80	30	45	90				1,112	2,232
Bahamas	89	9,228	18,456	27	238	476	477	954	1,908				10,420	20,840
Barbados	49	1,987	4,044	10	92	186	862	906	2,081		445	889	3,430	7,200
Bermuda	20	2,509	5,018	30	256	513	292	1,171	2,343				3,936	7,874
British Virgin Islands	12	267	534	9	50	100	60	120	235				437	869
Cayman Islands	9	239	478	1	7	14		220	441				466	933
Dominica	7	121	242	8	33	65		NA						
Dominican Republic		1,581	3,162										1,581	3,162
Grenada	20	521	1,042	12	78	156		255	550				854	1,748
Haiti	24	775	1,550			NA								
Jamaica	107	6,116	12,099	35	276	501	517	1,730	3,369				8,122	15,969
Montserrat	6	70	140	3	13	26	76	155	310				228	456
Netherlands Antilles		3,409	6,818											
Puerto Rico	64	8,337	16,674	42	484	968		NA						
St Kitts	17	268	533	11	52	101	27	49	101				369	735
St Lucia								40	80		810	1,620	850	1,700
St Vincent	22	349	641	4	44	73								
Trinidad & Tobago	32	1,528	3,056	6	143	286								
Turks & Caicos Islands	2	27	54	3	23	46							50	100
U.S. Virgin Islands	52	2,976	5,960	33	422	850	1,332	1,520	3,100				4,918	9,910

TABLE 1H

Caribbean region

- 1972 .

NUMBER OF ESTABLISHMENTS, ROOMS, BEDS, IN RESORT ACCOMMODATION BY TYPE OF ACCOMMODATION AND COUNTRY

	Hotels			Guest Houses			Cottages/Apts			Not Classified			Total	
	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Estabs	Rooms	Beds	Rooms	Beds
Antigua	32	1,104	2,208	9	43	86	39	55	111				1,202	2,405
Bahamas	105	10,326	20,652	42	320	640	983	1,869	3,738				12,515	25,030
Barbados	44	2,048	4,128	15	133	257	938	1,332	2,816		150	299	3,663	7,500
Bermuda	21	2,943	5,887	28	245	490	283	1,098	2,195				4,286	8,572
British Virgin Islands	12	267	534	9	49	98	86	161	285				477	917
Cayman Islands	12	385	770	2	13	26	-	307	615				705	1,410
Dominica	9	182	364	8	34	67	4	11	22				227	453
Dominican Republic	-	1,641	3,282		Nil			Nil					1,641	3,282
Grenada	19	514	1,028	12	93	186		260	520				867	1,734
Guadeloupe	29	988	1,976	8	53	106		NA					NA	
Haiti	39	1,302	2,604	34	406	812	40	132	264				1,840	3,680
Jamaica	106	6,535	13,120	36	278	487	627	2,164	4,267				8,978	17,874
Martinique	18	1,278	2,556										-	-
Montserrat	6	70	140	3	13	26	81	165	330				248	496
Netherlands Antilles														
Puerto Rico	64	9,001	18,002	39	439	878	1,500	3,000	6,000				12,440	24,880
St. Kitts	19	348	683	12	79	140	30	52	107				479	930
St. Lucia	14	700	NA					63	126		376	2,152	1,139	2,278
St. Vincent	22	344	660	4	44	73	50	100	200				488	933
Trinidad & Tobago	32	1,528	3,056	6	143	286		NA						
Turks & Caicos Islands	2	35	70	4	29	58		Nil					64	128
U.S. Virgin Islands	48	2,637	5,260	33	417	840	1,299	1,459	3,030				4,513	9,130

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TABLE 1J

VOLUME AND GROWTH IN HOTEL ACCOMMODATION, 1968-1972

ISLAND	Number of Rooms		Annual average growth rate (%)
	1968	1972	
The Bahamas		10,326	
Puerto Rico	8,054	9,001	2.5
Jamaica	3,764	6,535	15.0
Netherlands Antilles	1,934	3,500 ^{a/}	16.0
Bermuda	2,010	2,943	10.0
U.S. Virgin Islands		2,637	
Barbados	1,947	2,048	1.0
Dominican Rep.	1,196	1,641	8.0
Trinidad & Tobago		1,528	
Haiti		1,302	
Martinique		1,278	
Antigua	899	1,104	5.0
St. Lucia	200 ^{a/}	1,000 ^{a/}	50.0 ^{a/}
Guadeloupe	668	988	10.0
Grenada	242	514	21.0
Cayman Isles	216	385	15.5
St. Kitts-Nevis		348	
St. Vincent	236	344	10.0
British Virgin Isles	178	267	11.0
Dominica	50	182	38.0
Montserrat	48	70	10.0
Turks & Caicos Isles		35	

VOLUME AND GROWTH IN COTTAGE AND APARTMENT ACCOMMODATION, 1968-1972

ISLAND	Number of Rooms		Annual average growth rate (%)
	1968	1972	
Jamaica	983	2,164	21.5
Barbados	686 ^{a/}	1,332	18.0
Bermuda	675	1,098	13.0
Cayman Islands	159	307	18.0
Grenada	83	260	33.0
St. Vincent	60	100	14.0

^{a/} Estimated

TABLE 1K

Caribbean region 1972

NUMBER OF HOTELS AND ROOMS BY SIZE OF HOTEL AND COUNTRY

	10-24		25-49		50-99		100-199		200-299		300-499		500+		TOTAL.	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
Antigua	16	242	11	382	4	314	1	166							32	1,104
Bahamas	45	649	19	681	11	764	15	2,016	5	1,176	5	2,046	5	2,992	105	10,324
Barbados	20	338	14	498	10	657	4	555							48	2,048
Bermuda	2	32	6	230	3	214	2	288	3	766	4	1,413			20	2,943
British Virgin Islands	8	99	3	102	1	66									12	267
Cayman Islands	8	123	2	77	1	60	1	125							12	385
Dominica	7	110	2	72											9	182
Dominican Republic				N/A												1,641
Grenada	13	191	2	63	1	50	1	186							17	490
Guadeloupe	21	286	2	74	3	207	3	421							29	988
Haiti	18	247	13	452	7	498	1	105							39	1,302
Jamaica	38	633	33	1,117	18	1,229	11	1,395	3	712	1	388	2	1,061	106	6,535
Martinique															18	1,278
Montserrat	6	70													6	70
Netherlands Antilles																
Puerto Rico	8	150	18	707	11	880	13	1,815	4	939	7	2,735	3	1,775	64	9,001
St Kitts	17	251	1	33	1	66									19	350
St Lucia	7	94	3	136	2	100	1	120	1	250					14	700
St Vincent	20	294	2	50											22	344
Trinidad & Tobago	18	269	4	138	7	464	2	215			1	442			32	1,528
Turks & Caicos Islands	2	35													2	35
U.S. Virgin Islands	17	316	14	493	10	725	5	694	2	409					48	2,637

TABLE 1L

PERCENTAGE DISTRIBUTION OF TOURIST BEDS 1972

ISLAND	Hotels	Guest houses	Cotts/ Apts.	Total	Average Hotel Size (Rooms)
Antigua ^{a/}	92	3	5	100	(35)
Bahamas	82	3	15	100	(98)
Nassau	92	2	6	100	(143)
Freeport	88		12	100	(252)
Family Islands	67	9	24	100	(28)
Barbados	55	7 ^{b/}	38	100	(47)
Bermuda	69	6	25	100	(140)
Br. Virgin Islands	58	11	31	100	(22)
Cayman Isles	55	1	44	100	(32)
Dominica	80	15	5	100	(20)
Dom. Republic	100			100	
Grenada	59	11	30	100	(27)
Guadeloupe					(34)
Haiti	71	22	7	100	(33)
Jamaica	73	3	24	100	(62)
Kingston	85	10	5	100	(51)
Montego Bay	79	1	20	100	(60)
Ocho Rios	65	0	35	100	(87)
Port Antonio	54	6	40	100	(39)
Martinique					(71)
Montserrat	28	5	67	100	(12)
Neths. Antilles					
Puerto Rico	72	4	24	100	(141)
St. Kitts	73	15	12	100	(18)
St. Lucia	90 ^{a/}	4 ^{a/}	6	100	
St. Vincent	71	8	21	100	(16)
Trinidad & Tobago	32	6			(48)
Turks & Caicos	55	45		100	(18)
U.S. Virgin Is.	58	9	33	100	(55)

^{a/} Estimate
^{b/} Includes "Not Classified"

TABLE 1M

Caribbean region

LOCAL OWNERSHIP OF TOURIST ACCOMMODATION. ^{b/}

		HOTELS	HOTEL ROOMS	GUEST HOUSES	GUEST HOUSE ROOMS
Antigua	<u>Number</u>	11	201	9	43
	<u>Local Share</u>	34%	18%	100%	100%
Bahamas ^{a/} (Nassau)	<u>Number</u>	3			
	<u>Local Share</u>	10%			
Barbados	<u>Number</u>			10	
	<u>Local Share</u>	49%		100%	
Bermuda	<u>Local Share</u>		47%		
British Virgin Islands					
Cayman Islands	<u>Number</u>	6	97		
	<u>Local Share</u>	50%	25%		
Dominica	<u>Number</u>	5	127		
	<u>Local Share</u>	56%	70%		
Dominican Republic					
Grenada					
Haiti					
Jamaica					
Montserrat	<u>Number</u>	5	60	2	6
	<u>Local Share</u>	83%	86%	66%	46%
Netherlands Antilles					
Puerto Rico					
St Kitts	<u>Number</u>	7.5	124		
	<u>Local Share</u>	40%	36%		
St Lucia	<u>Number</u>	3	91		
	<u>Local Share</u>	NA	less than 10%		
St Vincent	<u>Number</u>	17.5	244		
	<u>Local Share</u>	70%	63%		
Trinidad & Tobago					
Turks & Caicos Islands	<u>Number</u>	6	0	1	10
	<u>Local Share</u>	0%	0%	20%	28%
U.S. Virgin Islands					

^{a/} Local ownership of hotels in Family Islands may be greater.

^{b/} Latest data available.

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 2. VISITORS AND VISITOR CHARACTERISTICS

2.1 Statistics

Statistics relating to visitor arrivals are generally compiled from entry and departure cards. Most islands use a standard international embarkation and disembarkation (E/D) card which may meet the requirements of immigration authorities but is not very useful for the tourism industry. The standard card does not identify tourists directly, although home address indicates whether a passenger is a returning resident or a visitor. Entry and departure cards generally require travellers to give their intended address. In addition the type of accommodation to be used would be of interest.

The major drawback to the standard E/D card is that it ignores length of stay. To produce these statistics, authorities have to match the arrival and departure cards of each traveller, and many islands find this task too laborious. Given the importance of the tourism industry to the Caribbean Islands and the need to learn more about visitor characteristics, immigration authorities and tourist agencies might well gather valuable information with more detailed processing of the E/D cards.

Bermuda and The Bahamas use their own computer punch cards for entry and departure statistics. Obviously however only islands with a significant tourist inflow can justify using such a system. The British Virgin Islands also have amended the format of their E/D card. The departure card is a counterfoil of the arrival card, containing date of arrival and date of departure, thereby facilitating estimates of average length of stay. A similar card is used by the French islands. The Bermuda E/D card requires visitors to state the purpose of their visit. In this way, tourists can be distinguished from business visitors, government officials and returning residents.

A new format for the entry and departure card, which would better meet the islands' data collection needs, is shown below. The visitor questionnaire, to be completed only by outgoing passengers, would be considered separately for analytical purposes.

INCOMING/OUTGOING (delete whichever does not apply)	TO BE COMPLETED BY OUTGOING PASSENGERS ONLY	
INTERNATIONAL E/D CARD	Strictly confidential	For statistical purposes only
1 Mr/Mrs/Miss..... (Please print name in full)	1 What has been the main purpose of your visit? (Tick one box only)	5 Where did you stay in Turks and Caicos?
2 Date of birth..... (Day) (Month) (Year)	Holiday <input type="checkbox"/>	Hotel <input type="checkbox"/>
3 Country of birth.....	Business <input type="checkbox"/>	Guest house <input type="checkbox"/>
4 Nationality.....	Business and pleasure <input type="checkbox"/>	Friends or relatives <input type="checkbox"/>
5 Occupation.....	Visiting friends and relatives <input type="checkbox"/>	Rented apartment or house <input type="checkbox"/>
6 Home address.....	Other <input type="checkbox"/>	Other <input type="checkbox"/>
7 Last port of embarkation (incoming passengers)..... (exclude places called at briefly in transit)	2 Is this your first visit to the Turks and Caicos Islands?	6 How many people are travelling with you?
8 Next port of disembarkation (outgoing passengers)..... (exclude places called at briefly in transit)	Yes <input type="checkbox"/> No <input type="checkbox"/>	0 <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>
9 Address during stay in Turks and Caicos.....	3 How many full days have you spent in Turks and Caicos on this trip?	5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 or more <input type="checkbox"/>
10 Length of stay.....	<input type="checkbox"/>	7 How many of those travelling with you are aged
11 Purpose of visit.....	4 What has been the total cost in U.S. Dollars of your present stay in Turks and Caicos?	under 2 <input type="checkbox"/> 3 - 5 <input type="checkbox"/> 6 - 9 <input type="checkbox"/> 10 - 13 <input type="checkbox"/>
12 Passport number.....	\$0 - 25 <input type="checkbox"/> \$26 - 50 <input type="checkbox"/> \$51 - 100 <input type="checkbox"/> \$101 - 150 <input type="checkbox"/> \$151 - 200 <input type="checkbox"/>	8 Have you visited, or will you be visiting, any other Caribbean Islands on this trip?
13 Place and date of issue.....	\$201 - 250 <input type="checkbox"/> \$251 - 300 <input type="checkbox"/> \$301 - 400 <input type="checkbox"/> \$401 - 500 <input type="checkbox"/> Over \$500 <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
..... (Signature of passenger)	N.B. If you know only the total expenditure of your group please divide the group cost by the number of its members	9 If so, which?
FOR OFFICIAL USE ONLY	 Thank you.

Source: Turks and Caicos Islands Outline Development Plan, Shankland Cox Partnership 1971

Useful information can be gained from periodic airport surveys. Travellers must generally wait some time prior to departure and the completion of a questionnaire would not be a major imposition. A survey of departing rather than arriving tourists is preferable, since they can report on actual experiences. Such surveys can be useful to tourist operators, to publicity and promotion agencies, and to authorities responsible for controlling standards and defining future policies and objectives within the industry. Visitor surveys have been used in The Bahamas, Jamaica, Puerto Rico and Bermuda to obtain information about expenditures and earnings, and can provide additional information about characteristics and behaviour. The Bermuda survey questions visitors about the facilities they used, as well as whether their's is a repeat visit, a package holiday; whether a travel agent was used; what magazines they read most frequently; and what activities they pursued while in the country.

The hotels are another source of visitor information. Monthly returns from hotels provide regular information, with less organization and administration than is necessary for a survey. Among the more developed islands, Barbados and Puerto Rico obtain regular returns to supplement E/D data. Puerto Rico relies heavily on hotel returns because visitors from the U.S.A. and the U.S. Virgin Islands are not required to fill out E/D cards. Smaller islands, such as St. Kitts-Nevis and the British Virgin Islands, request monthly returns from hotels

about guest bednights, average length of stay and country of origin. However, hoteliers and hotel associations may be unco-operative, often simply because they do not have the manpower required to fill in the returns.

The 1963 UN Conference on International Travel and Tourism divided "visitors" into two categories:

- (i) tourists -- visitors who stay at least 25 hours and less than one year in a country. Their purpose of visit might be classified as leisure (recreation, holiday, health, study, religion, sport), business, family, friends or mission;
- (ii) excursionists -- visitors who stay less than 25 hours (including cruise ship passengers).

Statistics have been synthesised in this study so that visitors termed 'tourists' by the UN are called 'stopover visitors' and 'excursionists' are designated 'cruise ship passengers' or 'visitors in transit' as appropriate. The term 'tourist' is used in this report to distinguish stopover visitors arriving for leisure purposes from business, family, friends or mission visitors. In St. Lucia and Grenada, and possibly some other islands, 'visitors' are so defined that they may include expatriates and foreigners resident in those islands. Figures for these islands cannot be adjusted and the difference could well be statistically insignificant. Most islands prepare statistical tables showing the country of origin of visitors. Some islands interpret country of origin as normal country of residence and others process visitors' nationality. The criterion used is stated for each island in this study.

Average length of stay is usually interpreted as an average of the number of 'days' but Bermuda and Jamaica count the average number of 'nights'. Other islands, such as Barbados, which calculates average length of stay from hotel bednight figures, are likely to use 'nights' also. Most islands do not specify their method, so it may be necessary to increase some islands' figures by one day before making comparisons. Information on visitor characteristics can be found in Tables 2E to 2M.

2.2 Annual Visitor Arrivals

Stopover visitors by island, from 1960 to 1972 are shown in Table 2E. Information concerning annual arrivals from 1968 to 1972 is almost complete (see also Part II, Chapter 3) and suggests there were approximately 3,200,000 visitors to the Caribbean islands in 1968 and 4,500,000 visitors in 1972. Table 2A below gives regional totals but excludes Dominica, the Netherlands Antilles, Trinidad and Tobago and the Turks and Caicos Islands, which were unable to provide full data. The regional totals show that arrivals increased at an annual average of 8.5% between 1968 and 1972. The fast growth between 1968 and 1969 slowed in 1970, parallelling the slower growth in the U.S.A. and reductions in trans-Atlantic flight fares, but started to recover in 1971 and 1972.

TABLE 2A: STOPOVER VISITORS TO THE CARIBBEAN - 1968 to 1972

Total Annual Visitor Arrivals	Year	Annual Growth Rate (%)
2,642,535	1968	
3,058,665	1969	15.75
3,106,358	1970	1.56
3,363,573	1971	8.28
3,697,474	1972	9.93

See Table 2G for growth rates for the individual islands.

In 1972, Puerto Rico and The Bahamas each received more than one million visitors, or approximately 50% of total visitors to the Caribbean. Their share of the market was even higher in 1968. Their much slower growth rates than the average for the region are undoubtedly due to the greater volume of tourists involved. Jamaica, Bermuda, and the Netherlands Antilles are estimated to have received between 300,000 and 400,000 visitors each in 1972. Bermuda's below average growth rate may have been due partly to the restraint on growth exercised by the island's Government (see Part II, Chapter 1). Jamaica and the Netherlands Antilles enjoyed fairly high annual averages from 1968 to 1972, i.e., 12% and 11% per annum respectively. The third group of islands, with between 100,000 and 250,000 visitors each in 1972, includes Barbados and the Dominican Republic, which averaged rates of increase of 16% and 22.5% respectively.

In the larger islands there appears to be a correlation between the size of the tourist industry and the rate of growth in visitors between 1968 and 1972. However, islands with fewer than 100,000 visitors per year do not conform to any pattern. This group includes such high growth areas as Haiti, Martinique, the British Virgin Islands, St. Lucia and the Cayman Islands, which appear to be emerging as new tourist destinations. Montserrat and the Turks and Caicos Islands also display high annual average growth rates, but absolute numbers are not remarkable. On the other hand, possibly because they have not yet achieved the take-off stage, islands such as St. Vincent, Montserrat and Dominica, all of which received fewer than 20,000 visitors in 1972, appear to be improving at a slower rate than some of the larger islands like Barbados or Jamaica. Antigua's recent slow growth rate in 1972 has not fulfilled earlier expectations.

2.3 Seasonal Distribution of Visitor Arrivals

Table 2H indicates the quarterly distribution of visitor arrivals; where possible, 1968 is compared with 1971. The traditional Caribbean tourist season lasts from December 15 to April 15, so the majority of visitors arrive during the first quarter of the year. A notable exception is Bermuda, where climatic conditions make spring and summer more important for tourism. Dominica in 1972 and St. Vincent in 1968 received less than 25% of their arrivals between January and March, indicating that traditional winter tourism was not firmly established. Antigua, Grenada, Montserrat, the Cayman Islands and St. Vincent (in 1971) all received more than 30% of their visitors in the first quarter, implying very marked seasonal differences in visitor arrivals.

Some islands have a shorter secondary tourism season in July and August, coinciding with the main summer holiday period in North America, Europe and the Caribbean, and quarterly statistics reflect a sharp increase in arrivals. Besides Bermuda, Dominica, The Bahamas, Jamaica and St. Vincent all received more than 25% of visitors in July, August and September. Recent measures to promote summer tourism to The Bahamas and Jamaica have proved effective. Antigua introduced a summer festival in the 1950s to commemorate the island's emancipation from slavery, but this has not developed as a major attraction. Why St. Vincent and Dominica receive so many summer visitors is less obvious, since both islands draw more from other Caribbean territories than from North America and Europe - possibly West Indians tend to take midsummer holidays on these islands.

Those islands with a large proportion of arrivals in the first quarter seem to have the lowest intake in the second quarter. The greatest variations occur in the fourth quarter. Barbados, Dominica, Haiti, Montserrat and St. Lucia receive more than 25% of their visitors then. The majority of visitors come in December, probably for the Christmas holiday. Other islands receive relatively few visitors in the last quarter, reflecting the seasonal trough in October and November.

Comparison of the 1968 and 1971 figures (Table 2H) suggests that many islands, e.g., Antigua, The Bahamas, Cayman Islands, Haiti and Jamaica -- achieved a more even distribution of visitors in 1971 and in 1968, because of a faster growth rate in summer visitors than in winter arrivals. Barbados and Bermuda, however, show an opposite trend. Nowhere in the Caribbean is business good in the autumn and early winter months. This period is often considered the rainy season, but the Caribbean is pleasant at all times of the year and seasonal weather conditions are often difficult to predict.

2.4 Types of Visitor

Stopover visitors to the Caribbean are usually tourists, but business visitors as a percentage of the total vary from less than 1% to about 30%. Statistics from Barbados show that 98.6% of visitors are tourists and 0.8% private business visitors. The remainder are officials, students, family and friends. Hotels in San Juan have the highest incidence of business visitors in the region. In 1971-72, 20% of visitors were engaged in business and 15% were combining business with leisure activity. Information from Jamaica suggests that between 15% and 20% of air arrivals at the Norman Manley airport, Kingston, are business visitors, while a much smaller number of these enter at Sangster airport, Montego Bay. Impressions from hoteliers in the Cayman Islands suggest that 20% of winter and 50% of summer guests are in the islands on business. Some 10% of visitors to

Bermuda in the spring and summer of 1972 were businessmen. Many of the Eastern Caribbean islands attract more people from other islands than from farther afield and St. Lucia estimates that between 5% and 9% of its visitors are on business.

Motive for travel of Caribbean residents to other islands seems never to have been investigated. Hoteliers in Montserrat comment that about 20% of West Indians are businessmen and the remainder tourists. Many West Indians seem to be visiting family and friends, although some may be reviewing work opportunities. Parties of schoolchildren frequently travel between islands and the number of officials visiting other Caribbean territories is said to be growing mainly because of meetings.

The Caribbean caters mainly to the wealthy North Americans. A survey at the Bermuda airport in 1972 showed that more than 50% of departing passengers had an annual income of \$15,000 or more. All the islands with established tourism industries (Bermuda, The Bahamas, Puerto Rico, Jamaica and the U.S. Virgin Islands) as well as certain other islands (the British Virgin Islands, St. Vincent and the Grenadines, Grenada and Antigua), contain some luxury hotels, which typically offer a relaxing holiday in tranquil, beautiful surroundings. Such hotels often emphasize their remoteness and absence of telephones, air-conditioning and other symbols of modern living. They appeal to the visitor who wants to "get away from it all" and who is likely to return in subsequent years.

Nevertheless, many hoteliers believe that the type of tourist is changing. Visitors are said to be more budget-conscious than previously. Unfortunately, expenditure data are not good enough to test this hypothesis. In The Bahamas there are probably as many affluent visitors today as there were in the past but their vacation habits have changed. Tourists today typically take more and shorter holidays. Decline in expenditure on duty-free goods is frequently cited as an indicator of the change in type of visitor, but changes in U.S. import regulations, increased prices of duty-free items and the increase in world trade (which makes many goods internationally available), are other possible explanations.

The North American middle-income groups are increasingly being attracted to the Caribbean, particularly with the availability of more package holidays. Almost half the guests in commercial accommodation in Bermuda in the spring and summer of 1972 came on a package deal. Similar indications exist in The Bahamas. About 75% of Antigua's winter trade is estimated to come from package tours. Barbadians believe that the growth of package tourism and the subsequent influx of large groups of middle-income tourists have contributed to a loss of more wealthy tourists to neighbouring St. Vincent, the Grenadines and Grenada. Middle-class visitors are believed to concentrate their travel to the Caribbean in summer when hotel rates are cheaper, while upper-class visitors tend to come in winter. Some supporting evidence is shown in Table 2B below. Since the number of summer visitors is increasing faster than winter visitors, the middle-class market can be presumed to be expanding rapidly.

TABLE 2B: INCOME OF VISITORS TO BARBADOS - 1970

Income (in U.S. \$)	Winter Tourists Percent	Summer Tourists Percent
Below \$5,000	8.0	11.7
\$5-10,000	21.1	43.9
\$10-15,000	17.0	20.5
\$15-25,000	19.4	12.9
\$25,000 and above	34.5	11.0
All visitors	100.0	100.0

Source: The Tourist Industry in Barbados - G.V. Doxey, Toronto, 1971

Package tourism from Europe seems an imminent and likely development in the Eastern Caribbean. In St. Lucia, British developers and transport/tourism operators have recently been working together to expand the package holiday market. Similarly, German financiers have invested in St. Lucia and have been looking at Antigua. Club Méditerranée offers visitors from France cheap holidays in the French West Indies. A similar institution, the Club Caribbee, attracts young North Americans to selected hotels in Antigua and Jamaica. Holiday Inns on St. Lucia, Antigua and Grenada also receive package tours.

When making long-term demand forecasts for tourism facilities, information is needed about the number of visitors who will require commercial accommodation and what proportion stay in private homes. Generally, about 70% stay in hotels and guest houses. A survey in The Bahamas demonstrated that 10% of visitors were day-trippers, 20% were staying with friends in rented accommodation which they had arranged privately on boats or private planes, and the remaining 70% were using licenced accommodation. Statistics for Haiti indicate that about 70% of visitors stay in hotels and 30% in private homes. Available data from the Netherlands Antilles suggest that a higher proportion (75-88%) uses hotels, while in Barbados, the proportion is smaller (55%). About three quarters of visitors to Bermuda stay in hotels and guest houses; self-catering rented accommodation absorbs about 20% and private homes the remainder. The only exception seems to be Montserrat, where a large stock of privately owned housing is sold to foreigners. An analysis of the proportional distribution of bednights, made by Transport and Tourism Technicians in 1971, is shown in Table 2C below.

TABLE 2C: DISTRIBUTION OF BEDNIGHTS TO TYPES OF ACCOMMODATION IN MONTSERRAT - 1971

Type of Accommodation	Distribution of Bednights
Hotels	16%
Villas - rented	15%
Villas - owned	50%
Private homes of friends and family	19%
All accommodation	100%

Information is not available on the demographic and social characteristics of visitors to the various islands. However, black North Americans have been visiting the Caribbean in increasing numbers. In Grenada, it was observed that Blacks expressed more interest in West Indian culture than the average visitor and spent more on food and gifts than did other visitors from equivalent income groups. Several Caribbean islands are attempting to attract black Americans, since this group is regarded as a largely untapped demand segment with high travel potential.

2.5 Country of Origin

Visitor arrivals by country of origin for 1968 and 1971 are aggregated for all territories in Table 2D below. ^{1/}

TABLE 2D: VISITOR ARRIVALS BY COUNTRY OF ORIGIN - 1968 and 1971

Country of Origin	1968		1971	
	<u>Visitors Thousands</u>	<u>Percent of Total</u>	<u>Visitors Thousands</u>	<u>Percent of Total</u>
U.S.A.	1,809	78.4	2,159	75.6
Canada	162	7.0	199	7.0
U.K.	69	3.0	73	2.6
Europe	43	1.9	71	2.5
South America	75	3.2	85	3.0
Central America	12	0.5	16	0.6
Caribbean	136	5.9	253	8.9
Total	2,307	100.0	2,856	100.0
Total visitors ^{1/}	3,000,000		4,000,000	

^{1/} The table does not include information from the U.S. Virgin Islands, Dominica, Guadeloupe and the Turks and Caicos Islands, but their inclusion would be unlikely to alter the relative shares significantly. More details are given in Tables 2J and 2K.

The proportions of visitors from Europe, South America and Central America shown in Table 2D are probably understated, since not all islands counted these visitors separately. Furthermore definitions of 'Caribbean' vary from island to island. Some islands include Puerto Rico and the U.S. Virgin Islands in totals for the U.S.A. and, in some instances, only visitors from the CARICOM Community were counted. Nevertheless, the results seem reasonable when compared to the individual figures for each island. The regional totals suggest that the proportional distribution in 1971 was similar to that for 1968, with a small decrease in U.S. and U.K. visitors, offset by an increase in European and Caribbean visitors. Table 2L gives the percentage of U.S. visitors to the different islands in 1971.

If visitors to islands not included in Table 2D are estimated, the proportion of U.S. visitors travelling to the Caribbean would probably rise to over 80%, particularly given the volume of travel to the U.S. Virgin Islands and the high proportion of U.S. visitors to those islands. More than 80% of visitors to Puerto Rico, The Bahamas, Bermuda and Jamaica come from the U.S.A. These territories share two important characteristics: of all Caribbean islands, they are the most established and successful in terms of size of tourism development and they are close to and have very good communication links with the U.S. mainland.

The Cayman Islands, British Virgin Islands and Haiti are slightly less accessible but are relatively close to the mainland; in 1971 between 60% and 80% of their visitors originated in the U.S.A. All three experienced rapid growth rates of between 18.5% and 24% per annum during the period 1968-72 (Table 2F). The relationship between accessibility, i.e., proximity and/or good air access, to the U.S. mainland and the proportion of visitors from that country, is further demonstrated by the fact that the Netherlands Antilles, the Dominican Republic, the Turks and Caicos Islands, and Martinique received 50-60% of their visitors from the U.S.A. In the Leeward and Windward Islands (except Martinique) fewer than 50% of visitor arrivals were from the U.S.A. The largest proportion of U.S. visitors to the Leeward and Windward Islands is found in Antigua, which probably has the best air communications. Since the Eastern Caribbean contains most of the islands as yet undeveloped for tourism, the percentage of visitors from the U.S.A. can be an indicator of the industry's development on a given island.

The pattern of visitor arrivals in the Eastern Caribbean is somewhat different to that of more northern islands. Barbados is an exception, since 30% of visitors originate in Canada, so that nearly two thirds of all visitors are from North America. Barbados is somewhat similar in its level of tourism development (though notably different in character) to the more northerly islands. Grenada and St. Lucia both attract about 26% of their visitors from Canada and the U.K. and these visitors form the nucleus for their growing tourism industries. Thirty-four percent of visitors to Guadeloupe originate in Europe, probably in France. Trinidad attracts visitors from a variety of points of origin, including some 17% from nearby South America. A large proportion of visitors to the Eastern Caribbean comes from other Caribbean islands. St. Kitts, St. Vincent, Dominica and Montserrat draw at least half their visitors from within the region.^{1/}

^{1/} The growth of Caribbean visitors is not undesirable, but does not generate exchange earnings foreign to the region and economic benefits are thus more limited.

In 1971, more Canadian visitors arrived in Barbados than in The Bahamas or in Bermuda - a reversal of the 1968 situation. Antigua, Grenada, Guadeloupe, St. Lucia and Trinidad all attract large numbers of Canadians. A greater proportion of Canadian than U.S. visitors seems to be travelling to the Eastern Caribbean. Furthermore, Canadians constituted 12.5% of the visitors to Haiti in 1971, which is higher than the regional average. U.K. visitors also show a preference for the Eastern Caribbean. Most go to Barbados, followed by The Bahamas, Trinidad, Jamaica and Bermuda. However, visitors from the United Kingdom arrive in significant numbers in St. Lucia, Grenada and Antigua. British visitors generally travel to the CARICOM islands and Bermuda. Similarly, French visitors go to Martinique (14,000 in 1971), Guadeloupe (9,000 in 1971) and Haiti (6,000 in 1971); and approximately 9,000 Dutch went to the Netherlands Antilles in 1971.

Many of the Caribbean islands do not identify South American visitors in their statistics, but they appear to outnumber visitors from the United Kingdom and other Europeans. In 1971 there were 35,000 visitors to Curacao from Venezuela and Colombia, and 24,000 mainly from Venezuela to Trinidad and Tobago. Puerto Rico received 9,000 South American visitors in 1974. The Caribbean is relatively accessible for South and Central America but at present, insufficient emphasis is placed upon realising their undoubtedly great potential as tourist generators for the region.

2.6 Average Length of Stay

Average length of stay estimates vary from about three days for the island of Bonaire in the Netherlands Antilles to 12 days for Grenada. However, most islands average 5-8 days/nights, as indicated in Table 2M. Average length of stay is affected by the following: (i) the size of the island and the availability of things to do and/or places to see; Thus visitors to Aruba stay longer than do those to Bonaire, and visitors to Jamaica longer than those to Bermuda; (ii) the purpose of visit; e.g., in the Cayman Islands and Dominica hotels are used by businessmen, who generally stay 2 or 3 days and by tourists, who stay between 7 and 10 days; (iii) distance from point of origin; e.g., visitors to The Bahamas from the U.K. usually stay 15 or 16 days, Canadians, 8, and residents of the USA, typically 5 or 6 days. Significantly, visitors from California generally stay longer than visitors from Miami; (iv) data from Barbados suggest that visitors in the winter season stayed longer on average than summer visitors; this trend was also observed in The Bahamas, in St. Kitts-Nevis and Jamaica; (v) type of accommodation: there seems to be a slower turnover of guests in private homes than in hotels; visitors to Haiti in 1970 stayed 6.1 days on average in hotels, compared to 8.9 days in private houses. Similar variations were noted in the Netherlands Antilles and in Bermuda (1971 survey). The longer stay in Montserrat and Grenada may be explained by the large numbers of visitors to private homes; and (vi) hotel type: length of stay varies between luxury and standard hotels; guests in luxury hotels in Barbados stay longer on average than those in 'A' and 'B' class hotels.

Because of the decline in the average length of stay in several islands, governments and tourist agencies are concerned by the implications that they must attract larger numbers of visitors in order to maintain the same number of bednights. Several explanations have been offered:

- (i) change in the type of visitor: persons with work commitments, short holidays and limited funds are outnumbering the more affluent, leisured visitors;
- (ii) greater mobility: air fares are becoming comparatively cheaper and services are improving. "Island hopping" is becoming feasible and multi-centre holidays are becoming more popular;
- (iii) higher prices: the cost of living is increasing in tourist-generating countries and in the islands themselves;
- (iv) in Puerto Rico, Jamaica and Bermuda particularly an increasing number of visitors combine business and pleasure, and, typically, make short visits;
- (v) there is an increasing tendency to take two or more short holidays a year.

2.7 Transport Mode

Nearly all stopover visitors to the Caribbean arrive by air and only about 2% by sea. However, the British and U.S. Virgin Islands are exceptions. Statistics are incomplete but more than 50% of visitors to the U.S. Virgin Islands arrive by sea. These numerous small islands in close proximity, are a major centre for boating, sailing and fishing. In addition, ferry and air boat services between Tortola, St. Thomas, St. Croix and Puerto Rico offer attractive and convenient transport. Many visitors to St. Vincent arrive by sea. St. Vincent and the Grenadines have advantages similar to the Virgin Islands for the development of boating activities. The number of sea arrivals partly reflects an expansion of boating and possibly also poor air communication between St. Vincent and Barbados. Small craft travelling in the Eastern Caribbean frequently start out from Antigua, Martinique or one of the northern islands and move southward aided by the trade winds. At present, the number of visitors travelling by boat is small and there seems to be a potential for expansion. Banana boats arriving in St. Lucia and Dominica also carry passengers. Proximity to the U.S. mainland makes it feasible for small craft to travel between Florida and The Bahamas. Thus, some 6% of visitors to The Bahamas are sea arrivals other than cruise passengers. The number and growth of cruise ship visitors to the Caribbean are shown in Table 2N.

TABLE 2E

Caribbean region

ANNUAL STOPOVER VISITOR ARRIVALS

	1960	1965	1968	1969	1970	1971	1972
Antigua	25,380	48,651	55,838	61,262	65,369	67,637	72,328
Bahamas	-	-	818,994	970,325	891,479	960,818	1,036,210
Barbados	35,500	68,400	115,695	134,303	156,417	189,075	210,430
Bermuda	111,287	187,265	267,442	280,987	302,776	319,310	339,782
British Virgin Islands	-	-	22,793	29,513	33,589	38,600	44,800
Cayman Islands	-	6,612	14,160	19,410	22,891	24,354	30,646
Dominica	-	5,355	9,977	-	-	14,708	15,294
Dominican Republic	19,361	27,998	60,230	74,263	67,566	106,468	135,036
Grenada	-	13,850	23,164	29,627	30,436	35,626	37,933
Guadeloupe	-	-	-	18,835	24,612	27,570	27,972
Haiti	-	-	23,051	28,311	33,691	44,933	67,625
Jamaica	-	189,013	258,460	276,929	309,122	359,323	407,806
Martinique	-	15,432	20,666	26,022	35,674	49,330	54,984
Montserrat	-	-	6,215	7,475	8,382	7,270	11,463
Netherlands Antilles	-	73,460	205,771	216,525	268,437	-	-
Puerto Rico ^{a/}	347,425	606,093	910,903	1,067,511	1,088,379	1,095,119	1,172,885
St Kitts	-	-	9,797	11,779	13,472	15,105	16,245
St Lucia	5,210	12,908	22,653	25,382	29,529	33,198	42,399
St Vincent	-	-	12,472	15,569	17,586	17,407	16,902
Trinidad & Tobago	48,296	57,920	91,660	94,510	86,890	111,330	114,550
Turks & Caicos Islands	-	-	-	1,739	2,080	2,742	4,670
U.S. Virgin Islands	-	-	-	-	-	-	-

^{a/} Data refer to twelve months ending June.

TABLE 2F

PERCENT ANNUAL AVERAGE GROWTH OF STOPOVER VISITORS

<u>Island</u>	1960-72	1965-72	1968-72
Antigua	9.5	6.0	6.5
Bahamas			6.0
Barbados	16.0	17.0	16.0
Bermuda	10.0	9.0	6.0
British Virgin Islands			18.5
Cayman Islands		24.5	21.0
Dominican Republic	17.5	25.0	22.5
Dominica		9.0	11.0
Grenada		15.5	13.0
Haiti			31.0
Jamaica	14.5	11.5	12.0
Martinique		20.0	27.5
Montserrat			16.5
Neths. Antilles		22.0	15.0 ^{a/}
Puerto Rico	10.5	10.0	6.0
St. Kitts			13.0
St. Lucia	19.0	18.5	17.0
St. Vincent			8.0
Trinidad & Tobago	7.0	10.0	6.0

^{a/} Estimate

TABLE 20
GROWTH IN STOPOVER VISITORS 1968-72

Country	Annual visitors		Annual average growth rate (%)
	1968	1972	
Puerto Rico	910,903	1,172,885	6.0
Bahamas	818,994	1,036,210	6.0
Jamaica	258,460	407,806	12.0
Bermuda	267,442	339,782	6.0
Netherlands Antilles	205,771	-	15.0
Barbados	115,695	210,430	16.0
US Virgin Islands	-	-	-
Trinidad & Tobago	91,660	114,550	6.0
Dominican Republic	60,230	135,036	22.5
Antigua	55,838	72,328	6.5
Haiti	23,051	67,625	31.0
Martinique	20,666	54,984	27.5
British Virgin Islands	22,793	44,800	18.5
St. Lucia	22,653	42,399	17.0
Grenada	23,164	37,933	13.0
Cayman Islands	14,160	30,646	21.0
Guadeloupe	-	27,972	-
St. Vincent	12,472	16,902	8.0
St. Kitts-Nevis	9,797	16,245	13.5
Dominica	9,977	15,294	11.0
Montserrat	6,215	11,463	16.5
Turks & Caicos Islands	-	4,670	39.0

TABLE 2H
DISTRIBUTION OF VISITOR ARRIVALS
BY QUARTER - 1968 and 1971

	Year	Jan-Mar	Apr-Jun	July-Sept	Oct - Dec
Antigua	1968	33.8	19.8	23.2	23.2
	1971	32.2	20.8	24.3	22.7
Bahamas ^{a/}	1960	31.1	25.3	22.0	21.6
	1968	27.6	24.5	24.9	23.0
	1971	25.2	26.5	26.0	22.3
Barbados	1968	27.6	21.1	25.2	26.1
	1971	29.8	19.3	24.2	26.7
Bermuda	1968	18.5	30.3	29.4	21.8
	1971	16.1	31.5	30.7	21.7
Cayman I.	1968	35.6	22.5	20.1	21.8
	1971 ^{b/}	30.8	19.2	21.2	24.7
Dominica ^{c/}	1972	24.9	20.0	28.8	26.3
Grenada	1972	32.9	19.9	24.6	22.6
Haiti	1968	28.1	23.1	23.4	25.4
	1971	27.3	19.9	26.4	26.4
Jamaica	1968	29.7	22.9	25.6	21.8
	1971	29.5	23.1	26.5	20.9
Montserrat	1970	32.6	19.9	21.0	26.5
St. Lucia	1971	25.1	22.4	25.6	26.9
St. Vincent	1968	20.1	28.1	27.9	23.9
	1971	31.0	23.2	26.5	19.3

a/ Includes cruise passengers.

b/ Monthly data do not add to total in official statistics.

c/ Air arrivals only.

TABLE 2J

Caribbean region

NUMBER OF VISITORS BY COUNTRY OF ORIGIN - 1968 and 1971

	Number of Visitors by Country of Origin - 1971							Other Carib. territories	Number of Visitors by country of Origin - 1968					Other Carib. territories
	USA	Canada	UK	Europe	S.America	C.America	USA		Canada	UK	Europe	S.America	C.America	
Antigua	30,552	6,958	5,506	1,121	1,136	-	21,372	30,296	7,473	4,544	1,025	332	-	11,143
Bahamas ^{a/}	831,100	43,250	11,250	19,050	6,900	-	7,800	712,500	49,150	13,900	9,850	4,100	4,100	5,750
Barbados	68,487	53,690	13,621	-	-	-	38,571	41,287	27,879	11,493	-	-	-	26,148
Bermuda	272,690	29,380	9,260	2,870	-	-	-	221,710	28,880	10,700	2,140	-	-	-
British Virgin Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cayman Islands	19,117	1,785	544	-	23	155	2,453	9,605	748	243	-	51	97	1,943
Dominica	3,458	807	1,247	-	-	-	-	2,272	630	690	-	157	-	5,910
Dominican Republic	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grenada	12,441	4,662	4,875	-	558	-	10,817	9,600	2,859	3,610	-	287	-	5,229
Guadeloupe	7,254	2,692	-	9,358	-	-	2,582	-	-	-	-	-	-	-
Haiti	29,029	5,266	-	6,588	750	2,850	-	15,172	2,067	-	3,195	329	1,956	-
Jamaica	292,460	28,165	9,243	6,422	5,656	-	8,716	201,790	24,526	9,694	5,340	5,324	-	6,001
Martinique	27,144	3,585	-	14,340	-	-	512	8,366	2,183	-	4,911	-	-	546
Montserrat	4,132	1,720	757	-	-	-	10,314	5,888	1,106	492	-	-	-	8,996
Netherlands Antilles	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Curacao	45,958	2,000	1,965	8,582	35,112	-	5,381	43,895	717	717	6,760	35,162	-	4,951
Puerto Rico	472,573	-	-	6,340	9,438	1,443	32,619	458,688	-	-	5,329	6,617	774	24,943
St Kitts	4,023	790	705	-	13	-	9,217	3,525	685	455	-	29	-	4,948
St Lucia	7,666	3,376	5,240	-	801	-	13,426	6,492	2,036	2,907	-	86	-	9,289
St Vincent	5,581	1,245	1,037	-	-	-	7,017	2,878	1,244	1,222	-	-	-	3,706
Trinidad & Tobago	41,530	12,870	11,190	6,290	24,320	7,170	34,590	37,660	11,360	9,400	4,090	22,210	5,560	22,710
Turks & Caicos Islands	1,490	132	249	75	-	-	-	-	-	-	-	-	-	-
U.S. Virgin Islands	-	-	-	-	-	-	-	-	-	-	-	-	-	-

a/ The distribution between South and Central America and other Caribbean territories has been estimated.

Note: Visitors from areas other than those listed are excluded.

TABLE 2K

Caribbean region

PERCENT DISTRIBUTION OF VISITORS BY COUNTRY OF ORIGIN - 1968 and 1971

	% distribution 1971							% distribution 1968						
	USA	Canada	UK	Europe	S.America	C.America	Other Carib. territories	USA	Canada	UK	Europe	S.America	C.America	Other Carib. territories
Antigua	43.2	10.3	8.1	1.7	1.7		31.6	54.4	13.4	8.1	1.8	0.6		20.0
Bahamas	86.5	4.5	1.2	2.0	0.7 ^{a/}	0.5 ^{a/}	0.8 ^{a/}	87.1	6.0	1.7	1.2	0.5 ^{a/}	0.5 ^{a/}	0.7 ^{a/}
Barbados	36.2	28.4	7.2				19.5	35.7	24.1	9.9				22.6
Bermuda	85.4	9.2	2.9	0.9				82.9	10.8	4.0	0.8			
British Virgin Islands														
Cayman Islands	78.5	7.3	2.2		0.1	0.6	10.1	74.6	5.8	1.9		0.4	0.8	15.1
Dominica								22.8	6.3	6.9		1.6		59.2
Dominican Republic														
Grenada	34.9	13.0	13.7		1.6		30.4	41.4	12.3	15.6		1.2		22.6
Guadeloupe	26.3	9.8		33.9			9.4						8.0	
Haiti	64.4	12.5		13.8	1.7	6.0		65.8	9.0		13.9	1.4	8.0	
Jamaica	81.4	7.8	2.6	1.8	1.6		2.4	78.1	9.5	3.8	2.1	2.1		2.3
Martinique	55.0	7.3		29.1			1.0	40.5	10.6		23.8			2.6
Montserrat	22.4	9.8	4.1				55.9	34.5	6.5	2.9				52.8
Netherlands Antilles														
Curacao	42.4	1.9	1.8	7.9	32.3		5.0	43.2	0.7	0.7	6.7	34.6		4.9
Puerto Rico	89.0			1.3	1.9	0.4	6.1	91.1			1.0	1.3	0.2	5.0
St Kitts	26.6	5.2	4.7		0.1		61.0	36.0	7.0	4.6		0.3		50.5
St Lucia	23.1	10.2	15.8		2.4		40.4	28.7	9.0	12.8		0.4		41.0
St Vincent	36.3	8.1	6.7				45.7	28.3	12.2	12.0				36.4
Trinidad & Tobago	29.8	9.2	8.0	4.5	17.4	5.1	24.8	32.6	9.8	8.1	3.5	19.2	4.8	19.6
Turks & Caicos Islands	54.4	4.8	9.1	2.7										
U.S. Virgin Islands														

^{a/} Estimate

TABLE 2L

US VISITORS AS PERCENT OF TOTAL STOPOVER VISITORS BY
DESTINATION IN 1971

Destination	U.S. Visitors as % of Total Stopover Visitors
Puerto Rico	89.0
Bahamas	86.5
Bermuda	85.4
Jamaica	81.4
Cayman Islands	78.5
British Virgin Islands	70.0
Haiti	64.6
Turks and Caicos Islands	54.4
Martinique	55.0
Dominican Republic	50.0
Netherlands Antilles	50.0
Antigua	45.2
St. Vincent	36.3
Grenada	34.9
Barbados	36.2
Trinidad & Tobago	29.8
St. Kitts-Nevis	26.6
Guadeloupe	26.3
St. Lucia	23.1
Montserrat	22.4
Dominica	20.0

TABLE 2M
AVERAGE LENGTH OF STAY BY ISLAND - 1960 to 1972

Island	1960	1965	1968	1969	1970	1971	1972
Bahamas					5.8	6.0	6.2
Barbados*			6.3	6.5		6.4	
Bermuda*	8.1	6.2	6.0	5.9	5.8	5.6	5.5
Br. Virgin Is.							7.2
Dom. Rep.	2.5	3.0	4.0	4.0	4.8	4.8	5.8
Grenada							11.9
Guadeloupe				3.2	4.6	4.7	5.0
Haiti*			7.9	7.9	8.8		
Jamaica*		8.9	8.5	8.5	8.1		
Martinique*			3.3	3.4	4.2	4.9	5.3
Neths. Antilles:							
Curacao	5.5	4.8	4.6	5.4	5.2	5.1	5.5
Aruba	7.2	6.4	6.2	6.5	6.5	6.2	8.2
St. Maarten		7.5	4.8	5.0	4.2	5.0	
Bonaire	2.7	3.5	3.1	3.9	3.6	3.1	
Puerto Rico*	5.2	5.7	6.2	5.7	5.7	5.4	5.4
St. Kitts*							5.1
St. Vincent			5.4	7.9	8.0	8.2	8.1

* number of nights - elsewhere, assume number of days.

TABLE 2N

Caribbean region

CRUISE SHIP PASSENGER ARRIVALS

	1960	1965	1968	1969	1970	1971	1972	1973
Antigua			12,788	25,208	18,705	37,658	63,784	
Bahamas			253,219	337,071	351,865	435,825	407,191	
Barbados		52,664	75,981	80,565	79,635	79,159	100,086	
Bermuda	40,281	50,517	63,937	89,933	86,138	93,637	81,168	
British Virgin Islands								
Cayman Islands								
Dominica		1,542	3,287					
Dominican Republic								
Grenada		15,990	26,500	39,118	41,261	48,652	94,060	
Guadeloupe			38,476	49,969	32,240	21,550	17,589	
Haiti			27,785	23,940	28,613	42,505	92,329	
Jamaica		56,473	94,021	97,377	86,247	66,366	71,430	
Martinique		46,748	75,602	91,665	99,281	118,609	179,355	
Montserrat			910	478	1,821	1,803	1,066	
Netherlands Antilles	61,546	81,361	151,705	182,756	217,716	209,053		
Puerto Rico	42,322	95,970	122,451	136,604	163,771	261,159		
St Kitts			6,696	6,933	5,442	1,722	4,672	
St Lucia	2,858	10,948	23,261	40,541	40,837	42,859	37,267	
St Vincent			18,823	14,323	16,094	12,327	11,418	
Trinidad & Tobago	66,083					79,890	66,390	
Turks & Caicos Islands			Nil					
U.S. Virgin Islands	49,700	109,341	166,117	213,541	251,084	253,873	364,645	

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 3. HOTEL OCCUPANCY RATES

3.1 Average Annual Occupancy Rates

Statistics for hotel occupancy rates since the beginning of 1968 are not everywhere available by month and most islands tended to provide either room or bed occupancy rates. Data from Jamaica and Bermuda relate to all hotels, while Puerto Rico provided information on hotels and guest houses only. The Bahamas, U.S. Virgin Islands and Netherlands Antilles provided statistics for parts of their territories only, i.e., for New Providence and the Family Islands, for St. Croix and for Aruba and Curacao. St. Lucia, Trinidad and Tobago and St. Kitts-Nevis provided information on individual hotels and guest houses, but coverage is less than 100%. Barbados and the British Virgin Islands collect data regularly from bednight surveys, but the response to these is less than 100%. Occupancy rates for Antigua and Montserrat are calculated from occupancy tax returns since taxes are levied on the basis of tourist bednights. For purposes of comparison, it was assumed that estimates for individual units were representative for the island as a whole in St. Lucia and Trinidad and Tobago among others. It was further assumed, on the basis of evidence from Jamaica, that room occupancy rates were about 10% higher than bed occupancy rates on average.

Table 3B which compares average annual bed occupancy rates in 1972, was constructed on the basis of these assumptions. The table shows that Bermuda and the Netherlands Antilles achieved the highest occupancy rates, followed by Puerto Rico and The Bahamas. There seems to be a correlation between bed occupancy rates and visitor arrivals, i.e., the more developed islands have the highest annual occupancy rates and those with the least tourism development, such as St. Kitts-Nevis and Montserrat, have low occupancy rates.

Occupancy rates indicate the utilization by visitors of accommodation available. Thus the relationship between supply and demand for tourist facilities in the Cayman Islands, where bed occupancy rates averaged 45-50% in 1972, can be compared with Antigua, where they were between 20% and 30% even though Antigua received 70,000 visitors and the Cayman Islands only 30,000. Hence visitor arrivals and growth in numbers are relatively poor indicators of the success of a tourism development when unrelated to the supply of accommodation. In this context Table 3C reveals that annual average bed occupancy rates in Jamaica were 63% in 1968 and 45% in 1972, i.e., an overall decline of 30%, whereas in Barbados they averaged 51% in 1968 and were only 6% lower in 1972 when they averaged 48%. During this period both islands enjoyed expansion in terms of annual visitor arrivals. Jamaica received 240,000 long- and short-stay visitors in 1968 and 375,000 visitors in 1972 - an increase of 135,000. Barbados attracted 116,000 visitors in 1968 and 210,000 in 1972, a growth of 94,000. Provisions for expansion were made on both islands but, whereas Jamaica added one bed per 16.3 visitors, accommodations in Barbados grew by only one bed per 46.2 additional visitors. Even allowing for the difference in average length of stay (visitors to Barbados typically spend 6 to 6.5 days compared to 8 to 8.5 days spent by visitors to Jamaica), construction of new accommodation in Jamaica has outstripped that in Barbados and, more important, has exceeded the rate of increase in visitor arrivals. This is reflected in the sharp decline in average occupancy rates for Jamaican hotels compared with those in Barbados (see Table 3C).

The 1972 figures (Table 3D) suggest that Bermuda, the Netherlands Antilles and Puerto Rico are the only Caribbean territories with average annual bed occupancy rates of 60%. This crucial occupancy rate is generally considered to be the average break-even point at which hotels are financially viable. All islands, except the Cayman Islands, experienced falling occupancy rates during the period 1968-1972. The most disappointing year seems to have been 1970, when occupancy rates fell from their 1969 levels in all Caribbean islands for which statistics are available (except Curacao). Jamaica, Trinidad and Tobago, and the U.S. Virgin Islands' average occupancy rates for 1972 were more than 20% below those for 1969. The sharp decline is generally explained in terms of slower economic growth in North America, where most Caribbean tourists originate. The analysis in Table 3A suggests that most islands with significant tourist industries attained average annual occupancy rates above 60% in 1968.

TABLE 3A: ESTIMATED ANNUAL AVERAGE BED OCCUPANCY RATES FOR MAJOR ISLANDS - 1968

Island	Estimated Bed Occupancy Rates Percent	Actual Bed Occupancy Rate Percent
The Bahamas	60-65	
Bermuda	75-80	76.1
Jamaica	60-65	63.0
Netherlands Antilles	65-70	
Puerto Rico	65-70	
Trinidad & Tobago	60+	
U.S. Virgin Islands	60+	

Note: Actual rates are taken from surveys, the estimates are derived by comparing tourist bednights (i.e., tourist arrivals x average length of stay), with the number of beds available annually.

3.2 Monthly Variations in Occupancy Rates

Table 3E shows the standard deviation of monthly occupancy rates from the annual average. Mean variance is compared for most islands for 1972, however, complete data are not available for Puerto Rico, Haiti and the Netherlands Antilles. In general, seasonal fluctuations are greater in the islands that rely primarily on the tourism sector (Bermuda and Antigua) than in islands that have a greater variety of industries and which consequently attract business visitors, conference members, government officials, etc. outside the main tourist season (e.g., Puerto Rico, Trinidad and Tobago). Seasonal fluctuations are also more marked in successful tourist centres like Bermuda and the U.S. Virgin Islands than in Dominica, Haiti or, at an extreme, the Turks and Caicos Islands, where a "tourist season" is scarcely identifiable. Domestic tourism and use of visitor accommodation by local residents can assist in stabilising occupancy rates. In Jamaica domestic tourism helps to reduce seasonal fluctuations in hotel occupancy rates.

An acceptable level of mean variance in the Caribbean region may be impossible to define and identify, but many islands are concerned about the economic and social consequences of seasonal fluctuations and are attempting to offset these (see Part I, Chapter VI). The effectiveness of different measures could be tested by comparison of mean variance values.

TABLE 3B

ESTIMATES OF AVERAGE ANNUAL BED OCCUPANCY RATES - 1972

<u>Island</u>	<u>Bed Occupancy Rates</u>		<u>Accommodation Covered</u>
	<u>Estimated Rate</u>	<u>Actual Rate</u>	
Bermuda		66.6%	Hotels
Netherlands Antilles	55%		Hotels - Curacao & Aruba only
Puerto Rico	50-55%		Hotels & guest houses
The Bahamas	50-55%		Hotels - New Providence & Family Islands only
Cayman Islands			Hotels
Barbados	45-50%	48.3%	Hotels & guest houses
U.S. Virgin Islands			Hotels
Jamaica		45.3%	Hotels
Trinidad & Tobago	40-45%		Hotels
British Virgin Islands	30-40%		Hotels & guest houses
St. Lucia		28.7%	Hotels & guest houses
Dominica	20-30%	23.8%	Hotels & guest houses
St. Vincent			Hotels & guest houses
Antigua		22.0%	Hotels
Montserrat		19.3%	Hotels & guest houses
St. Kitts-Nevis	Less than 20%		Hotels & guest houses

Note: The occupancy rate in Haiti in 1971 was estimated at 18.0%

TABLE 30

HOTEL OCCUPANCY RATES ANNUAL AVERAGE 1968 - 1972

Caribbean region

	Occupancy rates (Beds/Rooms)					Annual % change in occupancy rate				Total change 1968-72	Bed/room occupancy statistics
	1968	1969	1970	1971	1972	1968-9	1969-70	1970-1	1971-2		
Antigua	28.4	30.1	25.4	23.0	22.0	+ 6.0	-18.5	-10.4	- 4.5	-29.1	Beds
Bahamas (New Providence and Family Islands only)				58.3	58.5				+ 0.3		Rooms
Barbados	51.2	52.6	45.9	47.8	48.3	+ 2.7	-14.6	+ 4.1	+ 1.0	- 6.0	Beds
Bermuda	76.1	75.0	73.1	73.3	66.6	- 1.5	- 2.6	+ 0.3	-10.1	-14.3	Beds
British Virgin Islands											
Cayman Islands			36.4	39.1	50.0			+ 7.4	+27.9		Beds
Dominica					23.8						
Dominican Republic											
Grenada											
Haiti				17.8							
Jamaica	66.8 63.0	62.1 58.7	50.1 46.2	51.5 46.3	48.9 45.3	- 7.6 - 7.3	-24.0 -27.1	+ 2.8 + 0.2	- 5.3 - 2.2	-36.6 -39.1	Rooms Beds
Montserrat	26.1	26.7	23.4	25.1	19.3	+ 2.3	-14.1	+ 7.3	-30.1	-35.2	Beds
NETHERLANDS ANTILLES											
Aruba	72.0	70.8	66.3	69.7		- 1.7	- 6.8	+ 5.1			Rooms
Curacao	72.4	55.1	60.5	54.8		-31.4	+ 9.8	-10.4			Rooms
Puerto Rico	74.9	68.8	66.7	62.9		- 8.9	-3.1	- 6.0			Rooms
St Kitts											
St Lucia					28.7						
St Vincent											
Trinidad & Tobago		73.2	57.0	56.3	47.8		-28.4	- 1.2	-17.8		Rooms
Turks & Caicos Islands											
U.S. Virgin Islands		62.5	50.2	48.9	52.7		-24.5	- 2.7	+ 7.8		Rooms

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TABLE 3D

Caribbean region

HOTEL OCCUPANCY RATES BY MONTH 1972 - BED/ROOM OCCUPANCY RATES

	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual Average	Standard Deviation	Notes
Antigua	13.1	27.5	70.5	25.0	21.0	18.8	12.0	12.5	2.4	18.2	12.5	26.5	22.0	+16.3	All hotels (beds)
Bahamas	47.5	70.4	76.2	65.7	NA	NA	NA	66.8	38.0	42.5	57.7	56.3	58.5	+11.6 New Providence) +15.3 Family Islands)	hotels (rooms)
Barbados	48.6	75.4	60.0	50.8	32.3	24.3	43.4	48.6	31.1	43.0	58.4	58.4	49.3	+13.7	Hotels and guest houses (beds)
Bermuda	33.8	57.2	79.6	91.3	88.5	80.8	75.7	81.6	57.5	69.4	50.8	35.1	66.6	+18.8	All hotels (beds)
British Virgin Islands													54.1	+7.2*	Hotels and guest houses (rooms)
Cayman Islands	58.2	70.6	71.5	56.5	39.5	35.7	40.1	44.6	21.0	34.1	48.1	63.1	50.0	+15.1	Hotels (beds)
Dominica	32.3	46.0	28.7	26.9	17.8	15.8	23.3	28.4	15.6	16.2	20.3	17.5	23.8	+8.6	Hotels and guest houses (beds)
Dominican Republic															
Grenada															
Haiti															
Jamaica	57.5 51.1	74.0 66.2	59.7 57.1	54.2 48.5	34.9 32.3	37.1 34.4	55.3 46.1	59.0 53.3	30.2 28.9	27.4 30.9	49.5 46.2	56.3 51.0	49.2 45.3	+11.1	All hotels (rooms) All hotels (beds)
Montserrat	7.4	24.1	43.9	46.3	25.6	11.0	9.4	30.2	11.5	8.8	6.0	7.3	19.3	+13.9	All hotels and guest houses (beds)
Netherlands Antilles	66.4	78.7	65.4	60.5	50.5										Hotels in Curacao and Aruba (rooms)
Puerto Rico	66.5	78.4	72.8	72.7	59.6	55.2	NA	NA	NA	NA	NA	NA	NA		Hotels and guest houses (rooms)
St Kitts															
St Lucia	27.8	69.6	47.5	31.3	18.3	8.6	23.3	25.4	12.6	18.3	22.7	36.5	28.7	+15.9	Hotels and guest houses (beds)
St Vincent															
Trinidad & Tobago	60.1	57.2	55.2	48.6	46.5	35.9	44.2	52.2	45.3	44.8	51.6	45.6	47.8	+6.7	Hotels (rooms)
Turks & Caicos Islands															
U.S. Virgin Islands	57.7	80.7	72.6	64.1	47.7	43.8	52.1	56.2	31.2	30.9	47.4	48.9	52.7	+14.2	Hotels in St Croix (rooms)

TABLE 3E
MEAN VARIANCE IN MONTHLY OCCUPANCY RATES

Bermuda	±18.8
Antigua	±16.3
St. Lucia	±15.9
The Bahamas	
Family Islands	±15.3
New Providence	±11.6
Cayman Islands	±15.1
U.S. Virgin Islands	±14.2
Montserrat	±13.9
Barbados	±13.7
Netherlands Antilles ^{a/}	±11.2
Jamaica	±11.1
Dominica	± 8.6
Haiti ^{b/}	± 7.6
Puerto Rico ^{c/}	± 7.2
Trinidad and Tobago	± 6.7

Notes: a/ 1971
 b/ 1970
 c/ 1971/72 fiscal year ends June.

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 4. EVALUATION OF TOURISM PROGRAMMES

4.1 Methodology

Few planning or tourism authorities have shown concern about the relationship between growth of tourism facilities and growth in demand. Yet information about trends in both supply and demand is essential for controlling or promoting the growth of the industry. The approach outlined here and illustrated later in this Chapter, is simple and fairly obvious, although reliable results would be possible only with a more thorough analysis than this short study allows.

The actual amount of accommodation available in a given year has been increased by the amount under construction and by that planned for construction within a selected time period. By assuming an occupancy rate that ensures the viability of the operation, the minimum number of bednights that need to be sold can be estimated. This is then related to projected visitor arrivals and average lengths of stay, i.e. bednights, to determine the extent of any under-supply or whether additional visitors are needed to occupy fully the existing and planned supply at the predetermined rate.

This methodology is suitable for most of the Caribbean, but Jamaica and Puerto Rico are building numerous self-catering units that are not included in the calculation. Allowance has also to be made for domestic tourism in these two islands, which could offset - at least to some extent - increases in accommodation capacity. The importance and growing attractiveness of self-catering accommodation in Jamaica is indicated by the bednight figures in Table 4A:

TABLE 4A: DISTRIBUTION OF BEDNIGHTS TO HOTELS IN JAMAICA - 1968 to 1972

Item	1968	1969	1970	1971	1972
Thousands of bednights sold in hotels	1,459	1,494	1,574	1,814	1,968
Stopover visitors	258,460	276,929	309,122	359,323	407,806
Average length of stay (nights)	8.5	8.5	8.1	8.1	8.0
Thousands of bednights - all visitors	2,197	2,354	2,504	2,911	3,262
% of total visitor bednights spent in hotels	66.4	63.5	62.9	62.3	60.3

Given the growth of self-catering accommodation throughout the area, better collection and analysis of data about this type of accommodation is required. This simple method of predicting occupancy rates could be refined and used more widely in tourism planning in the region. An important first step consists of developing more consistent and reliable information about all the components of a tourism programme. The material contained in this report should also be revised and periodically updated, using simple and continuous data collection techniques to illustrate the changes over time in supply of and demand for tourism facilities.

4.2 Statistics

Tourist Boards and planning authorities in the various islands were able to provide information about hotels and guest houses under construction. There was often, however, a problem in defining the base year data, i.e., the total accommodation existing in May/June 1973. Although some islands have updated figures, others could provide only data from rates sheets published in November 1972; still others gave estimates of tourist accommodation at December 31, 1972; and Puerto Rico had no figures later than June 1972. The chapter dealing with existing accommodation uses December 1972 figures as a base, but best estimates for mid-1973 are given here, recognising that the figures for the islands may not be strictly comparable. As in the previous chapter, information relating to cottages and apartments under construction and at the planning stage is incomplete.

Information about tourism projects under consideration was obtained almost entirely from government agencies responsible for tourism, town and country planning, land development and similar programmes. The UNDP physical planning team in the Caribbean, contractors, property agents and existing hoteliers who were planning extensions to their own properties also contributed data. A distinction was drawn between projects under serious consideration and those that seemed less assured. The former were defined as plans that were imminent, in receipt of planning approval or with firm government support and plans that seemed to have financial backing. Projects that are less assured are either long-term, not yet in receipt of planning approval, or those uncertain of financial support. The distinction is somewhat arbitrary and based on impressions gained at one point in time. The data are shown in Tables at the end of this Chapter.

4.3 Tourist Accommodation under Construction

In 1973 some 7,621 tourist rooms were under construction in the Caribbean - excluding The Bahamas and Haiti, for which no data are available. The 6,909 new hotel rooms constitute an 18% increment to existing resources. The 698 rooms under construction in cottages and apartments would add 22.4% to existing self-catering accommodation in the islands.

The greatest number of hotel rooms (some 2,140) are under construction in Jamaica, representing a 31% growth in the existing stock. Puerto Rico follows, with 1,452 hotel rooms, which will increase existing stock by 16%. Two of Puerto Rico's new hotels will provide a total of 962 rooms. In St. Vincent, a new

100-room hotel and four smaller hotels will increase existing facilities by 50%; in the Turks and Caicos Islands, 32 additional hotel rooms are equivalent to a 90% increase in hotel accommodation. Guadeloupe, which is adding 453 rooms, Antigua which is adding 422 rooms and the Dominican Republic, with 678 new hotel rooms, are all expanding their hotel accommodation by more than 35%. At the other extreme, the British Virgin Islands, Montserrat and St. Lucia reported no hotel construction underway, while in St. Kitts-Nevis, Grenada and Dominica construction activity was confined to minor extensions to existing establishments.

An estimated 300 rooms in cottages and apartments were under construction in Barbados in 1973. Grenada was adding 139 rooms in self-catering units, equal to more than 50% of existing accommodation in that category. Additional villas and apartments are likely to be constructed on all the islands, but, unfortunately, data are scarce. With the exception of Bermuda, where a building freeze has been imposed and possibly the Caymans, the other islands are anxious to promote construction of new tourism facilities.

In 1972 and 1973 average hotel size in the Caribbean was about 65 rooms. Of the rooms under construction, 4,693 will be located in 36 hotels, which indicates an average hotel size of 130 rooms. However, the size of net hotels is almost certainly larger because extensions to existing hotels are included. Twenty seven percent of the new hotel rooms will be in five hotels, each having more than 300 rooms.

4.4 Tourist Accommodation under Consideration

A number of proposals for construction of tourist accommodation are under consideration or in the planning stage. Time did not permit a detailed study of the feasibility of these proposals or of their construction schedules. The proposals have been divided into two groups - those that seem reasonably realistic in relation to the relative size of the island's industry or its past performance (Table 4C) and those deemed less likely to be implemented, if only because they seemed to have no firm commitment from developers and financiers (Table 4D). As pointed out earlier, the division is rather arbitrary and should be so regarded in the absence of a detailed investigation into each proposal and its context. The only purpose of this analysis is to demonstrate one technique for matching growth prospects with the volume of accommodation likely to be available at a particular future time. The time period selected covers the years from 1972 to 1976.

With these limitations in mind, it can be estimated that 10,850 rooms in tourist accommodation stand a reasonable chance of being constructed over the four-year period, of which some 9,050 are likely to be hotel rooms. The remaining rooms are planned for cottages and apartments, a large proportion of which could be in condominium units. Puerto Rico, which is planning to add 2,150 rooms, will build 2,000 in condominium hotels. Antigua has ambitious plans for an estimated 11,000 new hotel rooms, but it was assumed somewhat arbitrarily, that 2,000 additional rooms represented a feasible target for implementation. Despite the current large building programme, the Jamaican Tourist Board reports plans for an additional 1,474 hotel rooms. The ten-year development plan for Haiti recommends 1,070 rooms in eight hotels. Barbados is planning a major expansion of some 1,375 rooms, approximately one third of which will be condominiums.

Less realistic projects would provide another 38,400 new rooms. Approximately half of these are planned for the Dominican Republic, in the period 1976-81 and are dependent for their success upon the development of package-deal tourism to a new resort area in the Caribbean. The Five Islands and Long Island schemes in Antigua would contribute 10,000 tourist rooms in mixed accommodation complexes, if implementation is realised. Other large-scale schemes which have been similarly classified are Rodney Bay and Vieux Fort in St. Lucia, with a capacity for some 3,500 tourist rooms; Frigate Bay in St. Kitts with 2,000 rooms; and the Dominica projects of 1,300 rooms. Completion of these schemes within the projected time frame seems unlikely, although some could well succeed. In the absence of indications of firm commitments by developers, high probability ratings were not given these projects at the time of the Mission's visit.

4.5 Projected Arrivals and Length of Stay

Long-term projections of visitor arrivals are usually inaccurate because so many factors are difficult to predict. Short-term projections over three or four years can be more reliable, particularly on those islands with a well established tourism base. However, even short-term projections can provide misleading results in special cases. For example, in a country embarking for the first time on a major tourism programme, growth in the early stages can be astronomical in relation to past trends. The terms of reference and the time available did not permit a thorough analysis of the potential growth in visitor arrivals in each island. However, to illustrate the technique used, short-term trend projections were made for the period 1972 to 1976. These projections could understate the growth possibilities in some places and overstate them in others.

In many cases, information on length of stay was not available and arbitrary estimates had to be made. Accuracy is especially important here because length of stay is traditionally short in the Caribbean and, in some cases, an additional day can mean a 25% error. Again, on islands with undeveloped tourism industries, averages tend to be largely influenced by the short-stay business visitor. In such places, the development of a tourism industry should result in a lengthening of the visit.

4.6 Application of Method

In Table 4E the supply of accommodation in 1976 is expressed as available bednights (Column 5) by applying an average bed occupancy rate of 50% to both existing accommodation and that presently under construction or in a firm planning stage. A 50% occupancy rate was adopted rather than the 60% normally regarded as the rate for viable operation because (i) new hotels require two or three years to attain high occupancy levels; and (ii) the total includes self-catering facilities, which often operate at lower occupancy rates than hotels.

Demand in 1976 is expressed in Column 11 as visitor days in tourist accommodation. The projection was obtained by applying the average growth rate from 1968 to 1972 to 1972 stopover visitors and then multiplying by average length of stay. This figure was then reduced by 20% to allow for visitors staying with friends, on boats or in other forms of accommodation not normally included in statistics. The reduction also allows for the undoubted understatement of the availability of self-catering facilities on many islands. The exercise has many flaws and should therefore merely be considered indicative of the situation in 1976 if present demand trends are unchanged and if the current level of accommodation is changed only by the addition of projects at the construction stage in mid-1973.

The relationship between supply and demand is shown in Columns 13 and 14, by indicating the additional number of visitors or rooms required to satisfy actual supply growth or potential demand growth, using in both cases a bed occupancy rate of 50%. In practise, of course, there is a great deal of flexibility in the occupancy rate, which could be adjusted to an over- or under-supply situation. In this way, judgements may be made as to whether projected supply and demand are in equilibrium. A reasonable balance might be considered to exist if (i) the additional visitors required to meet available bednights amounted to less than about 10% of projected arrivals, on the assumption that minor changes in lengths of stay, occupancy rates or annual growth would eliminate the difference, or (ii) the demand for additional accommodation was less than about 20% of the expected total and average occupancy rates could rise by this amount to absorb the extra demand. The tentative nature of conclusions drawn from the analysis cannot be emphasised too strongly, because of the superficial nature of the analysis and the lack of precise data. The results are particularly suspect for island with relatively undeveloped tourism industries.

Caribbean region

NUMBER OF ESTABLISHMENTS AND ROOMS UNDER CONSTRUCTION BY SIZE OF HOTEL (Number of Rooms) - 1973

TABLE 13

	Hotels 0 - 99		Hotels 100 - 299		Hotels 300 +		All Hotels		Guest Houses	Rooms	Cottages/ Apts	Rooms	Total Rooms
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms					
Antigua	3	122			1	300	4	422				44	466
Bahamas													
Barbados								100			150	300	400
Bermuda			1	200			1	200					200
British Virgin Islands							NIL				30	60	60
Cayman Islands	2	73					2	73			1	60	133
Dominica	2	18					2	18			1	2	20
Dominican Republic								678					678
Grenada	2	11					2	11				139	150
Guadeloupe	2	73		380			4	453					
Haiti						NA							
Jamaica								2,140					
Martinique	1	11			1	307	2	318					
Montserrat				NIL				NIL			NA		
Netherlands Antilles	1	20	1	200			2	220					220
Puerto Rico	1	90	2	400	2	962	5	1,452			NA		
St Kitts		10						10			20	40	50
St Lucia								NIL			20	40	40
St Vincent	4	94	1	100			5	194	1	8			202
Trinidad & Tobago	1	35	1	253			2	288			NA		
Turks & Caicos Islands	4	32					4	32	1	6	2	13	51
U.S. Virgin Islands					1	300	1	300			NA		

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TABLE LD

Caribbean region

NUMBER OF ESTABLISHMENTS AND ROOMS PLANNED BUT LESS CERTAIN OF CONSTRUCTION IN 1973

Size of hotels	Hotels 0 - 99	Rooms	Hotels 100 - 299	Rooms	Hotels 300 +	Rooms	Hotels All	Rooms	Guest Houses	Rooms	Cottages/ Apt	Rooms	Total Establs Rooms
Antigua			1	200	1	1,000		9,000					9,000
Bahamas													
Barbados							6	NA					
Bermuda								NIL					
British Virgin Islands	1	10	1	100			2	110			200	400	510
Cayman Islands	2	30	1	200			3	230					230
Dominica	1	30	3	300			4	330			400	1,000	1,330
Dominican Republic								18,325					18,325
Grenada		150	2	350				500					500
Haiti								NA					
Jamaica								NA					
Montserrat	1	15					1	15	1	8			23
Netherlands Antilles													300
Puerto Rico													1,500
St Kitts	4	241	4	500			8	741			650	1,300	2,041
St Lucia			1	125		3,300	2	3,425			24	48	3,473
St Vincent	2	38			1	350	3	388	1	8			396
Trinidad & Tobago	3	155	3	470			6	625					625
Turks & Caicos Islands	6	145					6	145				25	170
U.S. Virgin Islands								NA					

TABLE 4E

Caribbean region

IMPLICATIONS OF TOURISM DEVELOPMENT PROJECTS UNDER CONSTRUCTION OR UNDER SERIOUS CONSIDERATION

Rooms	By year	1.	2.	3.	4.	5.	6.	7.	8.	9.	10.	11.	12.	13.	14.	Notes
Antigua	1973	1,256	466	2,000	3,722	1,358,530	72,328	6.5	93,000	5	468,000	372,000	986,530	197,300		
Bahamas	1972	12,313	N.A.	N.A.	-	-	1,036,210	6.0	1,308,200	6	7,849,200	6,279,400			(4,668)	1. Existing Accommodation.
Barbados	1973	3,328	400	1,375	5,303	1,936,325	210,430	16.0	381,000	6	2,286,000	1,828,800	107,325	17,900		2. Under Construction
Bermuda	1973	4,487	200	200	4,857	1,772,605	339,782	6.0	429,000	5	2,145,000	1,716,000	56,805	11,400		3. Under serious consideration
British Virgin Islands	1973	307	60	382	949	346,385	44,800	18.5	88,300	6	529,800	423,800			212	4. Existing & proposed Accommodation
Cayman Islands	1973	708	133	128	966	352,590	30,646	21.0	65,700	6	394,200	315,400	37,190	6,200		5. Annual bednights available assuming 30% occupancy rate.
Dominica	1973	246	20	0	266	97,090	15,294	11.0	23,600	4	94,400	75,500	21,590	5,400		6. Annual stopover visitor arrivals 1972
Dominican Republic	1973	1,806	678	0	3,484	906,660	135,036	22.5	304,000	7	2,128,000	1,702,400			2,180	7. Annual average growth rate 1968-72
Grenada	1973	924	150	0	1,074	388,360	57,933	13.0	63,000	10	630,000	504,000			317	8. Estimated annual visitor arrivals 1976
Guadeloupe	1973	(1,100)	453	1,050	2,603 ^{a/}	950,095	27,972	14.0	47,200	5	236,000	188,800	761,295	182,300		9. Projected average length of stay (nights)
Haiti	1972	1,846	N.A.	1,070	2,910 ^{a/}	1,062,150	67,625	31.0	159,900	8	1,279,200	1,023,400	38,750	4,800		10. Estimated total visitor days 1976
Jamaica	1972	7,407	2,140	1,474	11,021	4,022,665	407,806	12.0	641,700	8	5,133,600	4,106,900			231	11. Estimated total visitor days in tourist accommodation in 1976
Martinique	1973	(1,300)	318	251	1,869 ^{a/}	798,255	84,984	27.5	145,300	5	726,500	581,200	217,055	43,400		12. Spare capacity bednights in 1976
Montserrat	1973	254	0	38	292	106,580	11,463	16.5	21,100	10	211,000	168,800			170	13. Additional annual visitors required by 1976
Netherlands Antilles	1972	(3,600)	220	400	4,220 ^{a/}	1,540,300	(360,000)	11.0	546,500	5	2,732,500	2,186,000			1,769	14. Additional rooms required in 1976
Puerto Rico	1972	12,440	1,432	2,150	16,042	5,855,330	1,172,885	6.0	1,345,900	5	6,729,500	5,383,600	471,730	94,300		
St Kitts	1972	181	80	270	801	291,635	16,245	13.0	27,000	5	138,000	108,000	183,685	36,700		
St Lucia	1973	1,674	40	0	1,514	552,610	42,399	17.0	79,500	5	397,500	303,600	249,010	49,800		
St Vincent	1973	528	202	70	800	292,000	16,902	8.0	23,000	7	161,000	126,800	163,200	23,300		
Trinidad & Tobago	1972	(1,600)	288	270	1,158	787,670	114,550	(6.0)	144,600	6	867,700	694,200	93,470	15,600		
Turks & Caicos Islands	1973	80	51	47	178	64,970	4,670	39.0	17,400	4	69,600	55,700	9,270	2,300		
U.S. Virgin Islands	1974 ^{a/}	4,835	300	N.A.	5,135 ^{a/}	1,881,575										

a/ Estimate

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 5. FOREIGN EXCHANGE AND EXPENDITURES

5.1 Total Foreign Exchange Revenues

Estimates of total annual foreign exchange earnings from tourism are shown in Table 5B. There are some gaps, mainly among the small British islands. Lack of time prevented an analysis of the national accounting procedures of all islands included in this survey. Frequently total foreign exchange revenues seem to be calculated from estimates of per capita visitor expenditure. Estimates are likely to be more accurate for islands such as The Bahamas, Bermuda and Puerto Rico, where tourism authorities conduct sample surveys of visitors than for territories such as St. Lucia and the British Virgin Islands, where estimates of spending by various types of visitor are aggregated to give total revenue figures. The U.S. Virgin Islands identify tourist-orientated sectors in the economy and calculate foreign exchange revenue generated from tourism as a proportion of GDP. The drawback to this method is that while some tourist-orientated sectors like hotels are easily recognisable, other sectors such as distribution or transport derive revenue from local as well as visitor consumption.

5.2 Per Capita Expenditure

Data in Table 5C showing per capita expenditure of different types of tourist, vary in their reliability. The Bahamas, Bermuda and Puerto Rico conduct regular sample surveys of departing visitors at the airports or at hotels to obtain expenditure estimates. The surveys are subject to sampling errors and inaccuracies resulting from visitors failing to record their expenditure in detail, or from their reluctance (conscious or subconscious) to state accurately how much they have spent. Nevertheless, this type of survey, conducted frequently during the summer and winter seasons, remains the best source of visitor expenditure information. Consultants have carried out sample surveys in Barbados and St. Vincent to establish expenditure estimates at particular times. The Central Planning Unit in Jamaica conducted throughout 1970 sample surveys of passengers departing from the airports as part of a comprehensive study of the economic impact of tourist expenditure in the country. Elsewhere in the Caribbean, estimates are simply informed guesses based on knowledge of local prices and the experiences of neighbouring islands. Comparison of data collected from various islands can be misleading for many reasons including that the surveys were carried out at different times.

Available data suggest that daily visitor expenditure is highest in Grenada and Martinique, but as no empirical data were received from either of these islands, the estimates may simply be inaccurate. Daily expenditure by visitors to the U.S. Virgin Islands, Bermuda and The Bahamas seems to be higher than visitor expenditure in Jamaica or St. Vincent. Expenditures do, to some extent, reflect local prices and wages, but there are other influencing factors.

Expenditure by visitors to the U.S. Virgin Islands is particularly high, probably because duty-free shopping facilities are one of the islands' major attractions. In contrast, St. Vincent offers limited opportunities for spending other than on accommodation, food and transport; while islands such as The Bahamas and Bermuda induce considerable expenditure on entertainment, sports and restaurant services.

Daily expenditure figures for Jamaica seem low perhaps because they are based on a 1970 survey, but a more recent survey by the Jamaica Tourist Board indicates little increase in average expenditure in 1972. One explanation may be the increase in supply of lower-priced self-catering accommodation, combined with an increase in group travel, on which hotels offer discounts. Furthermore, visitors stay eight days on average in Jamaica, compared with five or six days in The Bahamas and Bermuda and, as the Central Planning Unit survey demonstrates, daily expenditure tends to decrease with longer average stays.

5.3 Expenditure Patterns of Different Types of Visitors

Statistics from Bermuda and Jamaica suggest that stopover visitors spend more per day than do cruise-ship visitors, probably because the latter do not pay for board or meals. For similar reasons, hotel guests spend more per day than do other visitors staying with friends, in self-catering accommodation or in guest houses. (This pattern is also largely accounted for by the differences in rates among the various types of accommodation.) Data from Jamaica indicate only slight variations in total expenditure between visitors staying in hotels and those in other types of accommodation, because non-hotel guests tend to stay for longer periods. Information from the British Virgin Islands and St. Vincent reveals that people who charter yachts tend to spend more per day than do hotel guests.

Visitor expenditure in winter is generally higher than in summer because of higher accommodation rates. The Jamaican survey indicated that winter visitors spend an average of US\$ 107 on items other than accommodation, compared with \$100 spent by summer visitors. Summer visitors therefore seem to be only slightly more budget conscious than winter visitors about all items of expenditure other than accommodation rates.^{1/} Vacationers in Puerto Rico and Jamaica seem to spend more per day than business visitors. A number of other variations in expenditure were indicated in the Jamaican survey, for which there is no comparable material from other countries in the region. Among these are indications (Table 5A) that persons on package holidays and on long visits spend less than non-package or short-stay visitors. Repeat visitors appear to spend less per day than first-time visitors, but the former stay longer and spend more per visit. Visitors from the U.S.A. and Central or South America tend to spend more per day on average, but visitors from Canada and the United Kingdom spend more per visit. Unfortunately, the statistics do not indicate the level of expenditure of Caribbean visitors, which was found to be quite low in St. Vincent. Besides the obvious factor of lower personal incomes, Caribbean visitors are more likely to stay with

^{1/} Such rates are often quoted MAP in the Caribbean, i.e., modified American plan, meaning room, breakfast and either lunch or dinner.

friends than in tourist accommodation and are less likely to purchase souvenirs.

The Jamaican survey found that visitors to Kingston, the capital city, spent less per day and per visit than did visitors to the resort areas of Jamaica. This may reflect a different pattern of expenditure of tourist and business visitors. In Jamaica, visitors to Ocho Rios and Port Antonio tend to spend less per day than visitors to the more urban resort area of Montego Bay. However, those in the quieter areas tend to stay longer and spend more per visit than visitors to Montego Bay. The Jamaican survey discussed the relative influence of certain variables on visitor expenditure; and equations which expressed the relationship between the variables and level of expenditure were derived by using regression analysis. Five variables were selected which could be easily measured and therefore utilised in making forecasts of expenditure:

- length of stay
- season of year
- country of origin
- purpose of visit
- airport of departure/area of stay

TABLE 5A: JAMAICA - LEVEL OF EXPENDITURE, 1970 ANNUAL AVERAGE
(in U.S.\$)

	Average expenditure per capita	Average expenditure per guest night	Average length of stay
All visitors	203.60	25.44	8.00
Repeat	221.73	24.27	9.14
First-Time	194.98	26.12	7.47
0-2 nights	66.08	40.41	1.64
3-7 "	173.53	32.59	5.33
8-14 "	263.34	24.98	10.54
15-21 "	325.07	17.98	18.07
23-30 "	456.42	16.43	27.79
31+ "	709.38	9.63	75.70
U.S.A.	204.96	26.96	7.60
Canada	241.51	21.14	11.43
U.K.	230.43	18.83	12.24
Europe	190.97	17.52	10.90
C/S America	157.27	25.38	6.20
Other	129.68	18.17	7.14
Montego Bay	215.52	30.96	7.00
Kingston	140.16	22.75	6.16
Ocho Rios	226.62	28.29	8.01
Port Antonio	216.33	26.98	8.02
Package	207.04	30.20	6.86
Non-package	245.69	27.54	8.92

The study concluded that, with qualifications, season of visit, length of stay and country of origin are all important influences on the level of expenditure of tourists; that the airport of departure is an important factor in the measurement of this level of expenditure, and that the purpose of visit could be an important factor for some groups of tourists. On the other hand, the five factors in combination or separately, are by no means sufficient to explain all the variation in expenditure for tourists as a whole, or sub-populations of tourists.

5.4 Category of Expenditure

As shown in Tables 5D and 5E, many islands provided estimates of the proportion of total visitor spending on accommodation and food. Expenditure on accommodation and food seems to account for more than 70% of the total in St. Vincent compared with 44% in The Bahamas and Barbados. Visitors to Jamaica, Puerto Rico and the U.S. Virgin Islands spend about 60% of their total outlay on food and accommodation. Part of the difference in the accommodation expenditures between these islands and Barbados and The Bahamas may be due to variations in hotel rates. Casinos in The Bahamas are a major source of revenue, but visitors to Puerto Rico also spend considerable amounts on gambling and other forms of entertainment.

More detailed statistics from Jamaica, The Bahamas and Puerto Rico give expenditure patterns for different types of visitor. Cruise-ship passengers spend nearly all their money on transport, shopping and entertainment, whereas accommodation is the major item for stopover visitors. Winter visitors to Jamaica spend more on accommodation than do summer visitors, but less on every other item. Package tourists to Jamaica spend proportionately more on accommodation and shopping than do non-package visitors; non-scheduled air charter passengers to The Bahamas spend less on accommodation than do scheduled passengers. Thus, charter and package tourists may be quite different types of visitor. Travellers to Jamaica from North America and the U.K. spend proportionately more on accommodation than do South and Central American, European and other visitors. South and Central American and other visitors spend proportionately more on food and beverages outside hotels - including evening entertainment. Visitors from South and Central America and the U.S.A. who tend to spend more per day than all other nationalities, also spend the most on shopping. Puerto Rican data, which show the change in expenditure on different items over time, do not indicate any different pattern.

5.5 Leakage

Leakage is the extent to which the recipients lose revenue from tourism in the first round of expenditure. Estimates of the leakage associated with each tourist dollar have been made for some islands.

Island	Leakage of US\$1.00 tourist expenditure (in cents)	Source
Bartados	0.42	G. Doxey, 1970
Bermuda	0.30	Cambridge Research Inst. Mass. 1971
Cayman Islands	0.30	Not known
Puerto Rico	0.21	Economic Associates, Puerto Rico
Jamaica	0.34	Central Planning Unit, Jamaica, 1970
St. Vincent	0.50	First class hotels
	0.35 - 0.40	Other accommodation (Llewellyn-Davis 1972)

The above figures indicate leakages of between 21 and 45 cents on average, but it is not known whether this small group of territories is typical of the region.

TABLE 5B

Caribbean region

Estimated gross foreign exchange revenue from Tourism US\$

	1960	1965	1968	1969	1970	1971	1972	Source
Antigua			13,863,000	15,005,500	15,624,800			Ministry of Trade, Industry and Commerce
Bahamas			180,394,000	238,451,000	232,839,000	277,686,000	285,844,000	Annual visitor arrival reports - Ministry of Tourism
Barbados		13,050,000	26,950,000	28,800,000	31,750,000	38,630,000	45,000,000	Source: Doxey Report - Government Statistical Service
Bermuda			26,117,000	27,083,000	72,800,000	97,400,000	100,000,000	Tourist Dept.
British Virgin Islands							4,417,716	Govt. Statistics Dept - from estimates of daily expenditure per visitor
Cayman Islands			2,200,000	3,000,000				Tourist Board - based on estimated expenditure per visit.
Dominica							113,000	Dominica Tourist Board
Dominican Republic	3,000,000	3,300,000	13,000,000	17,700,000	16,400,000	21,400,000		
Grenada		1,684,600	8,128,600	11,630,000	10,699,800	12,846,000	12,190,400	Grenada Tourist Board
Guadeloupe								
Haiti				3,800,000	6,600,000	9,100,000		"Developpement du Tourisme en Haiti" -OAS
Jamaica		26,907,400	86,224,600	61,968,000	63,315,300	72,224,000	85,625,600	Jamaica Tourist Board - Assume J\$1.00 = US\$ 1.2572
Martinique							17,300,000	Estimate from average expenditure per day - IERD mission report
Montserrat					1,480,000			TTT - Tourist Development Plan 1971
Netherlands Antilles							72,230,000	NAF 233m. - In data received from IERD.
Puerto Rico	88,100,000	119,378,000	201,660,000	233,994,000	235,422,000	234,715,000	258,942,000	"Selected Statistics of Tourism Industry" - Tourism Development Co.
St Kitts			N.A.					
St Lucia			1,906,140	3,414,700	2,774,800	3,675,700	4,267,400	St. Lucia Tourist Board - estimated from daily expenditure estimates
St Vincent			N.A.					
Trinidad & Tobago	7,600,000	48,580,000	16,900,000	17,780,000	21,600,000	32,900,000		Central Statistical Office
Turks & Caicos Islands			N.A.					
U.S. Virgin Islands		84,014,882	100,894,803	112,368,245	100,480,079	91,130,670	108,715,650	Dept. of Commerce, Division of Trade and Industry

* Assume US\$1.00 = E.C.\$2.00

Caribbean region

TABLE 50
PER CAPITA EXPENDITURE FOR DIFFERENT TYPES OF TOURISTS

Territory & Year of Data	Daily Expenditure per Capita						Per Capita Expenditure per Visit			Expenditure For		Daily Expenditure & Purpose of Visit				
	1.	2.	3.	4.	5.	6.	7.	8.	9.	10.	11.	12.	13.	14.	15.	
Antigua	N. A.															
Bahamas 1972	41.82						258.03	45.00							Annual sample survey	
Barbados 1970										55.00	49.00			42C	Survey by Consultants(Doxy)	
Bermuda 1971	45.83	29.00						87.00						30C	Regular sample Survey	
British Virgin Islands 1972				40.00	6.00	50.00 (boat charterers)	36.00 (non-hotel)	200.00 (hotels)							No survey estimate	
Cayman Islands														30C	Not known - suspect estimate	
Dominica	N. A.															
Dominican Republic 1972	35.00														Impalm estimate	
Grenada 1972	50.00	20.00													Tourist Board estimate	
Guadeloupe	20.70															
Haiti 1971	18.00			30.00	8.00	12.00 (day visits)	173.00								OAS estimates	
Jamaica 1970	25.40	19.00		28.10	8.50	15.00-17.00 (cottage & guest house)	203.60	58.00 (standard)		27.60	23.50	26.80	23.90	34C	Sample survey (Central Unit)	
Montserrat 1971				27.00	12.00	22.00 (rented houses)				29.00	26.00				Estimate (TTI)	
Martinique 1972	47.00														Estimate	
Netherlands Antilles 1967		27.00		45.00	11.60										Estimate	
Puerto Rico 1971-72				47.00 -			165.00 (non-hotel)					49.00	43.00	21C	Annual sample survey	
St Kitts				53.00			287.00 -									
							320.00 (hotels)									
St Lucia 1972	25.00	10.00				6.00 (yachts)									Estimate (Tourist Board)	
St Vincent 1972			20.00	27.00	6.00	28.00 (yachts)				27.50 (hotels)	22.00 (hotels)				50C-1st Class hotels. Sample survey	
Trinidad & Tobago 1967												18.00	48.50		65-80C-yachts. Not known	
Turks & Caicos Islands 1972	30.00														Estimate	
U.S. Virgin Islands 1964-65			70.00					250.00							Sample Survey (1964-65)	

KEY
 1. Stopover
 2. Cruise
 3. Visitors
 4. Hotel Guests
 5. Non-hotel Guests
 6. Other
 7. Stopover
 8. Cruise
 9. All Visitors
 10. Winter)Stopover by
 11. Summer)Season (Daily)
 12. Tourism
 13. Business
 14. Leakage associated with \$1.00 expenditure
 15. Reliability of data

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TABLE 5D

ITEMS OF EXPENDITURE BY TYPE OF VISITOR AND ISLAND % Distribution

	Accommodation	Food and Beverage outside hotel	Transport		Shopping		Entertainment	Gratuities	Miscellaneous	Total
			Local	Inter-Island	In	Other				
Bahamas										
Air 1949	38.2	17.1						2.5	32.2	100.0
1972	43.9	15.6	5.4	1.6	9.9	3.7	11.7	4.9	3.2	100.0
Cruise		8.0	15.4	0.2	26.8	10.0	32.7	3.3	3.6	100.0
US Air Schedule	49.5	14.7	4.0	1.0	9.1	2.8	11.3	5.2	2.4	100.0
Non-Schedule Air Charter	32.7	17.4	8.2	2.9	11.5	5.5	12.6	4.2	5.0	100.0
Barbados - 1970										
Winter	47.0	20.0	7.0				14.0	8.0	4.0	100.0
Summer	38.0	24.0	6.0				16.0	11.0	3.0	100.0
Jamaica - 1970										
Stopover	57.9	9.2	8.5		11.9	6.5		4.7	0.9	100.0
Cruise (one stop)		6.9	27.0		27.9	30.4		2.9	4.9	100.0
Non package	57.8	9.3	9.1		11.7	6.5		4.7	0.9	100.0
Package	59.4	8.1	6.6		13.7	6.5		5.2	0.5	100.0
Winter	63.3	6.8	8.1		9.5	7.0		4.4	0.9	100.0
Summer	52.2	11.7	9.9		14.4	6.0		5.1	0.7	100.0
U. S. A	58.0	8.6	8.7		12.7	6.3		4.8	0.9	100.0
Canada	60.8	10.7	9.8		6.2	7.5		4.4	0.7	100.0
U. K.	65.0	10.0	10.0		8.8	5.1		4.4	0.7	100.0
Europe	54.7	10.2	11.6		3.8	7.8		4.4	2.5	100.0
C/S America	47.6	14.5	9.7		15.8	8.3		3.9	0.2	100.0
Other	48.2	14.6	12.1		8.2	10.0		3.8	1.1	100.0

STOPOVER VISITOR EXPENDITURE BY ISLAND, PERCENTAGE DISTRIBUTION

<u>ISLAND</u>	Accommodation and Food	Shopping	Entertainment	Other	Total
Bermuda	67.6			32.4	100
Puerto Rico					
1960	62	11	19	8	100
1965	65	9	22	4	100
1968	68	9	18	5	100
1972	61	10	23	6	100
St. Vincent					
Winter	78.2			21.8	100
Summer	72.1			26.3	100
U.S. Virgin Islands	63.2			36.8	100

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 6. EMPLOYMENT

6.1 Available Statistics

Few islands are able to provide employment figures for tourist accommodation. Measurement of indirect employment in the tourism industry is problematic in all islands. The reasons for the paucity of data are essentially: (a) the use by census and by labour force surveys of the standard industrial classification, which does not distinguish hotels or even tourism from "services"; (b) the preoccupation of labour departments with such traditional employers as agriculture and government (see annual reports from St. Kitts and Antigua) or, as on the Turks and Caicos Islands and the British Virgin Islands, with unemployment figures, rather than with total numbers or sectoral distribution of the labour force; (c) the relative autonomy of the hotel sector in most Caribbean islands in recruiting and firing staff, and the reluctance of managers to inform the government about the details of hotel operations.

The following broad estimates of total employment in hotel and tourist accommodation may be made for the five most developed islands. More information is contained in Table 6C.

Direct Employment in Tourist Accommodation, 1973

<u>Island</u>	<u>Numbers</u>
The Bahamas	10,000 - 11,000
Puerto Rico (hotels only)	9,500
Jamaica	9,500
Bermuda	4,500
Barbados	4,500

6.2 Employees per Room

Employee-per-room ratios measure the level of labour intensity associated with the hotel industry and provide an indication of the expected effect of a given amount of hotel construction on the demand for labour. Several factors seem relevant to these ratios:

- a) category of tourist accommodation: Hotel, guest house, cottage, apartment;
- b) quality of hotel: luxury, first-class, etc.;
- c) size of hotel;
- d) occupancy rate and distribution of guests throughout the year;
- e) worker productivity and management efficiency: the proportion of trained staff to hotel guests;
- f) pressure from government and trade unions to increase job opportunities.

It is not yet possible to say which factors are most important in the context of the Caribbean or how they change over time. In the case of a) and c) further detailed work is required to determine the thresholds and where the economies of scale etc. begin to operate. The absence of complete employment statistics means that employee-per-room ratios are often calculated from sample surveys and that ratios may relate to either total accommodation, to hotels and guest houses, or to hotels only. Therefore, it is difficult to distinguish whether variations in ratios are the result of statistical discrepancies among different islands or of differences in organisation and productivity in hotels. Available information is shown in Table 6D.

Statistics are most reliable for the more developed islands, such as The Bahamas, Bermuda, Jamaica and Puerto Rico. These islands appear to have similar employee-per-room ratios ranging from 1:1 to 1.2:1.0. Annual figures for Bermuda and Puerto Rico from 1968-72 suggest a declining trend, which might be caused by a decrease in occupancy rates or, alternatively, by higher levels of productivity as the industry established itself. Table 6A shows that in 1968-72 a 12% decline in hotel occupancy rates in Bermuda was accompanied by a 9% drop in employee-per-room ratios, while 16% fall in hotel occupancy rates in Puerto Rico was matched by a 12% decline in employee-per-room ratios in 1968-71.

TABLE 6A: EMPLOYMENT RATIOS & OCCUPANCY RATES

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
<u>Bermuda</u>					
Annual average occupancy rate - percent	76.1	75.0	73.1	73.3	66.6
Number of employees per room	1.19	1.18	1.16	1.14	1.08
<u>Puerto Rico</u>					
Annual average occupancy rate - percent	74.9	68.8	66.7	62.9	
Number of employees per room	1.14	1.14	1.05	1.00	

Enquiries made in a number of islands indicate that productivity has not increased in recent years. There seems to be little mobility within the hotel industry. Hotels do not offer career opportunities and are not attracting young people with sufficient basic education to learn specialised techniques or to gain promotion to hotel management positions. Generally training schools provide elementary training for maids, waiters and barmen only.

Hence, a large proportion of workers lack the incentive and/or the education, or both, to improve their performance with the result that employee-per-room ratios reflect only small increases in efficiency over time.

Barbados was identified as an island with highly developed tourism facilities for which reliable statistics are available. It differs from The Bahamas, Bermuda, Jamaica and Puerto Rico in that it has much higher employee-per-room ratios: Barbados' ratio of 1.30:1.00 in the off season rises to 1.83:1.00 in the peak season. A notable feature of Barbados' hotel industry is the small size of hotels and guest house establishments. In 1973, their average size was 33 rooms, compared with 67 rooms for Bermuda, 48 rooms for Jamaica (1972 figure) and 94 for Puerto Rico. Furthermore, no hotel on Barbados has more than 200 rooms. One implication might be that hotels with more rooms can exercise economies of scale in centralised services such as accounting, reception, kitchen services and maintenance, and that they can consequently support lower employee-per-room ratios than can medium-sized hotels.

The British Virgin Islands have above average employee-per-room ratios. Employment in hotels is strongly affected here by the presence of one medium-sized luxury hotel, which employs more than 50% of total hotel employees on the island. Table 6B indicates that luxury hotels generally employ more staff per accommodation unit than do standard hotels.

TABLE 6B: EMPLOYEE/ROOM RATIOS BY HOTEL CATEGORY

Antigua		Barbados		Netherlands Antilles	
<u>Hotel type</u>	<u>Employees per room</u>	<u>Hotel type</u>	<u>Employees per room</u>	<u>Hotel type</u>	<u>Employees per room</u>
Superior	1.43	Luxury	1.77	Luxury	1.41
Standard	1.18	'A' class	1.44	First class	1.32
Moderate	0.45	'B' class	0.81	Commercial	0.43
		'C' class	0.30		
		Apartment hotels	0.64		
		Guest houses	0.50		

There are several reasons for the higher employment rates in luxury hotels: (i) luxury hotels offer many facilities such as shops, entertainment and sports (golf, tennis, snorkelling, sailing etc.) and grounds, beaches and shopping areas need to be managed and maintained in addition to the hotel and which enable guests to have a complete holiday within the hotel complex; (ii) these

hotels generally offer higher standards of service; a luxury hotel is less likely to be permitted slow service and disorganisation caused by staff shortage than is a standard hotel; (iii) statistics from Barbados and the Netherlands Antilles suggest that luxury hotels have higher occupancy rates than standard hotels, as is the case in the British Virgin Islands. The relationship between high occupancy rates and high employee-per-room ratios is illustrated by the seasonal fluctuations in employment. Thus, it seems reasonable to conclude that luxury hotels, many of which have effective marketing and promotional methods, usually secure above average occupancy rates and can therefore provide more employment per room.

It is generally assumed that employee-per-room ratios will vary with the type of accommodation: conventional hotels employ more persons per unit of accommodation than do villas or apartments. The information collected in this study is not adequate to formulate conclusions as to typical employee-per-room ratios for different types of accommodation. For example, employee-per-room ratios for guest houses range from 0.41:1.00 in Grenada to 1.71:1.00 in Montserrat. It was anticipated that guest house ratios would be lower than hotel ratios, but in the British Virgin Islands and Montserrat this was not the case. Employee-per-room ratios in self-catering accommodation are available for only three islands: in Grenada, the ratio for cottages and apartments was calculated at 0.29:1.00; in Barbados, for apartment hotels it was 0.64:1.00; and in Jamaica a 1969 survey by the Central Planning Unit suggested typical ratios of 0.72 workers per cottage, i.e., 0.24 - 0.36:100 employees per room.

Employee-per-room ratios in some islands (St. Vincent, Dominican Republic, Cayman Islands, Turks and Caicos Islands, St. Kitts-Nevis and Grenada) are low, i.e., below 1:1. These islands mainly contain small hotels in which the owner-manager performs a number of functions himself in order to make the operation viable. Annual average occupancy rates are often below 30% and with the possible exception of the Cayman Islands and Grenada, these islands have barely developed their tourism industries and are unable to rely on a seasonal increase in occupancy rates to generate additional employment. Except in the Dominican Republic, average hotel size is small and centralised facilities are minimal. Hotels can therefore be run by few persons. A special feature of the Cayman Islands is that nearly full employment prevails and hotels must compete for scarce labour with other economic sectors. The absence of Montserrat and Dominica from the above category suggests that the statistical base requires improvement before the contribution of different causal factors to employee-per-room ratios in different islands can be assessed.

6.3 Seasonal Differences in Employment

Differences in employment throughout the year are measured by ratios of peak-to-slack season employment in hotel and tourist accommodation. In most instances, employment figures for the peak and slackest months are compared:

Country	Ratio of peak season to slack season employment	% not employed in slack season
Barbados	1.59:1.00	37
Montserrat	1.51:1.00	33
Jamaica	1.45:1.00	31
Antigua	1.45:1.00	31
St. Vincent	1.29:1.00	23
St. Kitts-Nevis	1.28:1.00	22
U.S. Virgin Islands	1.21:1.00	17
Puerto Rico	1.12:1.00	11
Netherlands Antilles	1.12:1.00	11

Puerto Rican hotels accommodate large numbers of local residents in the slack season and thus maintain reasonably high rates of occupancy throughout the year. In addition, Puerto Rico's economy is more diversified than that of other islands, and the island receives a substantial number of commercial and convention visitors throughout the year. Hence, employment in Puerto Rico's hotels is less cyclical than in the other islands. The U.S. Virgin Islands also display small variations in employment between the peak and off seasons. This may partly be explained by the local labour laws, which require hotels to retain their staff and adopt a rotational system of lay-offs.

Hotels close down for a number of weeks in the summer in many islands, notably in Antigua. Various measures have been devised to reduce hardship caused by the problem of seasonal unemployment. Many hoteliers prefer to employ all their staff on short-time or lay them off in rotation for a short period, rather than to fire them outright when the season ends. One hotel in the British Virgin Islands which closes for three months each year retains its entire staff on full pay, but few hoteliers can afford such generosity.

Many islands have promoted a policy of reduced tariffs in the summer season to attract North American visitors from middle and low income groups, who could not afford to visit the Caribbean in the winter peak season. Jamaica offers additional reductions to residents who wish to use hotels in the summer season. Resort areas of Jamaica have had some success in attracting weekend and holiday visitors from urban Kingston. A different approach is adopted by The Bahamas, which has established an annual festival similar to 'carnival' in the Eastern Caribbean, to boost its summer trade. Perhaps the most sophisticated techniques are used by Bermuda, where almost all visitors to hotels make advance bookings. The Tourist Board and hotel industry co-ordinate to project occupancy rates one or two months in advance and to identify likely slack periods. Promotion and advertising in North America are then stepped up to secure high and uniform hotel occupancy rates throughout the year. Phasing of cruise ships to coincide with a reduction in air passenger arrivals, which is also practised in Bermuda, has the effect of stabilising demand for labour arising indirectly out of tourism development.

6.4 Foreign Workers

Statistical information on foreigners working in hotels is sparse, although legislation in many islands requires that a certain proportion of local residents be employed in hotels that are in receipt of incentives. Clearly, governments do not always check whether hotels are complying with the law. The following table is based on scattered information that generally relates to 1972.

<u>Island</u>	<u>Foreign Workers as % of Total Employees</u>
Bermuda	42
British Virgin Islands	15-40
Cayman Islands	less than 10
St. Lucia	5
The Bahamas	3
Jamaica	2
Dominica	1

There appear to be few foreign workers in the hotel industry in most islands. Bermuda, which has a small resident population, a fully-fledged tourism industry and a high wage structure, is an exception, with 42% of the work force foreign in 1972. The large numbers of foreign workers in the British Virgin Islands arise partly from the presence of a large expatriate community and because the islands have attracted investors and hotel operators from the United States and Scandinavia, who have become managers in the hotel industry. The British Virgin Islands also attract workers from the Eastern Caribbean, particularly from the neighbouring islands of St. Kitts-Nevis, because wage rates are higher on average and because the British Virgin Islands are close to the U.S. Virgin Islands and Puerto Rico, to which many Eastern Caribbean islanders hope to gain admission.

Both The Bahamas and Jamaica strictly enforce regulations and work permit systems that prevent foreigners from gaining employment. The Bahamas has deliberately reduced the proportion of expatriates from 18% to 3% in the last six years. Nevertheless, where expatriates remain in The Bahamas, they seem to hold management and executive positions in the hotel and tourism industry. Statistics for St. Lucia and Dominica indicate that foreign workers are insignificant in their hotel industries. The statistics may, however, conceal the extent to which West Indian labour moves between the islands. An analysis of foreign workers in all sectors of the economy in the British Virgin Islands indicated that Caribbean Islanders were highly mobile and likely to work or live in a number of different islands during their lifetimes. The economic structure of the islands is characterised by industries with seasonal fluctuations and by high unemployment, both of which induce labour mobility, particularly among the unskilled.

6.5 Earnings

Wage statistics vary: some islands provide information on minimum agreed pay rates and others on typical earnings. Islands giving minimum wage rates are indicated by an asterisk in Tables 6E to 6H. The only measure of the difference between minimum agreed rates and average earnings is given for the U.S. Virgin Islands where average earnings are 14% higher than the agreed minimum rates. The difference appears to be less in most eastern Caribbean islands, where hotels are more likely to pay the minimum rates. Wages are often supplemented by tips in the hotel industry. Distance from the U.S. mainland seems to affect wage levels and wages are lower in the eastern Caribbean than in the northern islands. Workers seem to be most highly paid in the U.S. Virgin Islands and Bermuda, where minimum wage rates, exclusive of tips, for the lowest paid category of worker (maids, bellboys and waiters) are about \$50 per week. Wages in Puerto Rico are likely to be similar. Minimum wage rates agreed locally in the Virgin Islands are lower on average than those specified by the U.S. Federal authorities for the hotel industry, but lower paid workers are reported to have higher minimum wage rates than their colleagues on the U.S. mainland. Minimum wage rates for The Bahamas are also high. Pay differentials seem to be greater between, for example, waiters and headwaiters or cooks and headcooks, than in Bermuda. Hence, minimum rates for supervisory staff seem to be higher in The Bahamas than in Bermuda. Minimum wage rates for lower paid staff (maids, bellboys and waiters) in The Bahamas are about \$30 to \$40 per week.

Wage rates for hotels in the Eastern Caribbean are generally expressed in Eastern Caribbean dollars. Wages expressed below in US\$ have been converted at a rate of EC\$2.00 = US\$1.00. Data from St. Vincent and Dominica reveal that minimum weekly wage rates for the lowest paid workers may be as little as \$8.00 in 1973. Typical weekly wages for one hotel in St. Lucia show that maids, bellboys and gardeners earn \$8.00 or \$8.50 per week, but earnings in a larger, more modern hotel in St. Lucia are between 50% and 100% higher, indicating how hotel development can induce wage increases in the smaller islands. This is particularly noticeable in the British Virgin Islands, where one luxury hotel employs more than 50% of the territory's hotel workers and pays relatively higher wages than other hotels. Minimum wage rates for hotel workers in Antigua and Barbados, which have the largest tourism industries in the English-speaking islands of the Eastern Caribbean, are higher than those in the smaller islands. Minimum weekly wages for maids in Antigua are \$13.70 and in Barbados are \$15.00. Typical weekly earnings in Trinidad are marginally higher than in the small islands of the Eastern Caribbean.

Information from Jamaica is sketchy and rather outdated. In 1970, typical earnings for maids, bartenders and waiters were similar to those in Trinidad and Tobago, although workers in supervisory positions such as headwaiters, headbarmen and headcooks could earn higher wages than those paid in the Eastern Caribbean. Clearly, wages will vary according to the style and size of hotel, since the responsibilities attached to each position/occupation will vary. Jamaica has a wide range of hotel categories, with some quite large units. Therefore, the

industry's occupational structure is broad, with many responsible well-paid jobs, in addition to those in guest houses and small hotels. The British Virgin Islands seem to offer wages midway between those of The Bahamas and U.S. Virgin Islands, and those of the Eastern Caribbean and there is considerable variation between wages paid at the two or three luxury hotels and at smaller hotels and guest houses. Figures from two hotels in the Cayman Islands suggest that wages here are similar to those prevailing in the British Virgin Islands, with maids and waiters paid at least \$20 per week. Wages in the Turks and Caicos Islands are comparable to those paid in the Eastern Caribbean, in spite of close proximity to The Bahamas, where wages are high. Since there is a sizeable community of Haitian immigrants in the Turks and Caicos Islands, wages here are likely to be higher than in Haiti.

There is no identifiable trend in hotel wage increases in the Caribbean region as a whole. Hoteliers in the Cayman Islands stated that wages had risen by between 50% and 100% since 1970. Wages in a sample of five hotels in Trinidad rose by 35-55% in the same period. On the other hand, wages in Montserrat are reported to have remained fairly stable since 1970 and in Barbados only one change in minimum wage rates occurred between 1970 and 1973, giving workers an increase of 6-10%. Minimum rates of pay in Antigua rose by 17% between 1970 and 1973 and in Bermuda, where new rates were being negotiated in 1973, by 8-16%.

A service charge is added to guest bills in nearly all hotels in the Caribbean, which increases from 10% to 15% in islands with higher wage rates such as Puerto Rico, the U.S. Virgin Islands and The Bahamas. The general practise seems to be to distribute the whole of the service charge to staff under a points system that rewards seniority, special responsibility and other achievements. Kitchen, dining-room and bedroom staff were generally the main beneficiaries of tips, although a survey of earnings in the British Virgin Islands indicated that office staff could also benefit. Statistics from the U.S. Virgin Islands indicate that gratuities constitute 21% of earnings by hotel workers. In Puerto Rico tips could comprise as much as 30% of total pay and in The Bahamas earnings are increased by \$10-15 per week - (some 20-40%).

6.6 Unionisation

The extent to which hotel workers are unionised and the character and power of the trade unions vary from island to island. Unions have established minimum wage rates for hotel workers in Antigua, The Bahamas, Barbados, Bermuda, Dominica, Grenada, St. Lucia, St. Vincent and the U.S. Virgin Islands. In only one or two hotels in Dominica, St. Lucia and St. Vincent are there wage agreements between management and workers. Hotel workers in the British Virgin Islands are beginning to organise a trade union. The Bahamas and Bermuda, following British traditions, have trade unions representing the hotel and catering workers alone. Most islands however have only one or two non-specialised workers' unions. Open disputes between unions and employers are rare, but strikes have occurred in some islands, which have resulted in the temporary closure of hotels.

TABLE 6C

DIRECT EMPLOYMENT IN TOURIST ACCOMMODATION

	1968	1969	Total Employment		1972	1973	Ratio of peak season to off- season employ- ment.	Employment and employee per room ratios				Comments
			1970	1971				Hotels - 10-49	no. of rooms 50-99	100-199	200+	
<u>Antigua</u> employed			1,247	828			1.45/1.00	99	389			Total figures relate to hotels and guest houses only. All ratios calculated from sample of 9 hotels in 1973
rooms			1,067	1,144				132	259			
empl./room			1.17	0.72				0.75	1.50			
<u>Bahamas</u>												Estimated 10-11,000 employed in tourist accommodation. Employee per room ratios average 1.10 - 1.15, with no change over the last 3 years
<u>Barbados</u> employed			4,069				1.59/1.00					
rooms			2,218									
empl./room			1.83									Rentable Units not defined. Crocco Survey Dec. '71 Empl./ room. Luxury 1.77 Apt. hotels 0.64 'A' Class 1.44 G. Houses 0.50 'B' Class 0.81 Total 1.30 'C' Class 2.3 (too small sample) 1970 total - Census - hotels and guest houses.
<u>Bermuda</u> employed	3,375	3,472	3,609	3,875	3,775	4,316						Hotel Assoc. figs - nos. of beds ÷ 2 to give empl./room estimates. All tourist accommodation.
rooms	2,830	2,941	3,119	3,398	3,492	3,792						
empl./room	1.19	1.18	1.16	1.14	1.08	1.14						
<u>British Virgin Islands</u> employed				371				151	191		29	Elkan & Morley report 1971 - Hotels and Guest-houses.
rooms				248				152	66		20	
empl./room				1.50				0.99	2.89		1.45	
<u>Cayman Islands</u> employed					260			158		102		Sept. 1972 figs. from Tourist Board. Total 385 rooms . . . returns from some hotels not rec'd. Relate to Sept. which is low season when empl./room ratios are lowest.
rooms					321			196		125		
empl./room					0.81			0.81		0.82		

Table 6C (contd)

	1968	1969	Total Employed		1972	1973	Ratio of peak season to off-season employment.	Employment and employee per room ratios and type of accommodation					Comments
			1970	1971				Hotels - no. of rooms				Guest Houses	
								10-49	50-99	100-199	200+		
<u>Dominica</u>													
Employed					162			135				8	
Rooms					136			79				7	
Employed/room ratios					1.19			1.71				1.14	
<u>Dominican Republic</u>													
Employed					1,670								
Rooms					1,739								
Employed/room ratios					0.96								
<u>Granada</u>													
Employed						370		155	110			42	63
Rooms						766		260	186			103	217
Employed/room ratios						0.48		0.60	0.59			0.41	0.29
<u>Haiti</u>													
Employed					900								
Rooms					775								
Employed/room ratios					1.16								
<u>Jamaica</u>													
Employed	(6,302)				9,396	9,585	1.35/1.00*						
Rooms	()				8,128	9,065	1.54/1.00						
Employed/room ratios	(1.92)				1.16	1.05		1.6 ⁺	2.0 ⁺	2.08 ⁺		0.64 ⁺	0.72 ⁺ per cottage
<u>Montserrat</u>													
Employed						146	1.51/1.00	117				29	
Rooms						110		93				17	
Employed/room ratios						1.33		1.26				1.71	
<u>Netherlands Antilles</u>													
Employed					1,390		1.12/1.00						
Rooms					962								
Employed/room ratios					1.44								

Information for 4 hotels and one guest house only available - 1973

Infratur and SCP Survey Hotel Information.

Min. of Housing. Personal memory of one officer. may be unreliable.

Employee per bed ratio quoted 0.4 at present time, and expected to rise to 0.8 or even 1.5. Figure of 1.2 adopted for 10 year plan i.e. 0.6 persons per room.

Tourist Board - All tourist accommodation peak/off season ratios given for JHTA hotels 1967 and 1968. * JHTA hotels only (4,929 was total tourist accom. in 1968). + Central Planning Unit 1969.

All data from survey by members Calgary Uni. 1973. Persons per room ratios use peak season employ. figs. Hotels and Guest Houses.

Dept. of Economic Development
Employee per room ratios
luxury hotels 1.41
1st class 1.32
Commercial 0.43
Hotels only

Table 6C (contd)

	1968	1969	Total Employed		1972	1973	Ratio of peak season to off-season employment.	Employment and employee per room ratios and type of accommodation				Comments	
			1970	1971				Hotels - no. of rooms					Guest Houses
								10-49	50-99	100-199	200+		
<u>Puerto Rico</u>													
Employed	9,166	9,245	8,979	8,309	9,268	1.12/1.00							Hotels only included. June each year figures. Tourism Development Co. - selected statistics.
Rooms	8,054	8,123	8,529	8,337	8,779								
Employed/room ratios	1.14	1.14	1.05	1.00	1.06								
<u>St. Kitts</u>													
Employed				144		1.28/1.00							Source Annual Report - Dept. of Labour 1971. Employment in hotels, excluding guest houses - 1971. Also excludes Anguilla.
Rooms				224									
Employed/room ratios				0.64									
<u>St. Lucia</u>													
Employed					1,198	1,600 (896)	1.79/1.00	200(90)	250(156)	650(400)	500(250)		1972 - Total employed in Hotel Assoc. hotels - not guest houses. Labour Office - May 1973 figures being the off-season (shown in brackets) Figures for 8 large hotels only. Labour Office gained estimates of peak employment from hotels which seem too high.
Rooms					N. A.	821 (821)		79(79)	138(135)	354(354)	250(250)		
Employed/room ratios						1.95 (1.09)		2.53 (1.14)	1.81 (1.13)	1.84 (1.13)	2.00 (1.00)		
<u>St. Vincent</u>													
Employed						207	1.29/1.00	207					Labour Dept. Data - from survey of 13 hotels - no guest houses. 1973 Jan. & June. Good data.
Rooms						211		211					
Employed/room ratios						0.98		0.98					
<u>Turks & Caicos</u>													
Employed				40									Source Shankland Cox Studies 1971
Rooms				50									
Employed/room ratios				0.80									
<u>Trinidad and Tobago</u>													No information
<u>U. S. Virgin Islands</u>													
Employed			1,301	1,244		1.21/1.00		68	379	462	340		Sample of 14 hotels in St. Thomas & St. Croix. Reported in US Dept. of Labour, Wage & Hour Division "Hotels, Restaurants and Laundries in the V. I." 1971.
Rooms			1,232	1,438				80	348	601	409		
Employed/room ratios			1.06	0.87				0.79	1.09	0.77	0.83		

TABLE 6D

CARIBBEAN REGION EMPLOYEE-PER-ROOM RATIOS

Island	Type of Accommodation	Ratio per room	Date/Year of calculation
Barbados	Hotels & g. houses	1.30-1.83	Dec. 1971/April 1970
British Virgin Islands	Hotels & g. houses	1.50	April 1971
Neths. Antilles	Hotels	1.29-1.44	Slack/peak 1972
Montserrat	Hotels & g. houses	1.33	Peak 1972/3
St Lucia	Hotels	1.09-1.95	Slack/peak 1973
Dominica	Hotels	1.19	1972
Bahamas	Hotels & g. houses	1.10-1.15	1973
Bermuda	All accommodation	1.08-1.19	1968-1973
Jamaica	All accommodation	1.05-1.16	1971-1972
Puerto Rico	Hotels	1.00-1.14	1968-1972
USVI	Hotels	1.06-0.87	1970, 1971
Antigua	Hotels & g. houses	0.72-1.25	1970, 1971
Haiti	Hotels	0.80 - 1.16	1971
St Vincent	Hotels	0.77-0.98	June, Jan. 1973
Dominican Republic	Hotels	0.96	1972
Cayman Islands	Hotels	0.81	1972
Turks & Caicos Islands	Hotels & g. houses	0.80	1971
St Kitts	Hotels	0.64	1971
Grenada	All accommodation	0.48	1973

TABLE 6E

Caribbean region

WAGE RATES - WEEKLY EARNINGS US\$ - 1961

	OFFICE		DINING ROOM		BAR	BEDROOMS		KITCHEN		SERVICES		OUTSIDE			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Antigua *	39.51	28.22	16.93 - 28.22	19.76	11.29 - 14.11	22.58	18.06	28.22	11.29	43.33	19.76	19.76 - 11.29	19.76	11.29	18.06
Bahamas															
Barbados															
Bermuda *		64.00	55.00 - 75.00	65.28	41.52	78.64	68.08	78.00	41.52	85.00	85.00	63.00	72.00	41.52	65.00
British Virgin Islands															
Cayman Islands															
Dominica															
Dominican Republic															
Grenada															
Haiti															
Jamaica				34.00	10.00 +	34.00 +	10.00 +	17.00 - 33.00	10.00 - 21.00	52.00				22.00	
Montserrat															
Netherlands Antilles															
Puerto Rico															
St Kitts															
St Lucia															
St Vincent															
Trinidad & Tobago			20.00 - 26.00		11.00 - 13.00		13.50 - 26.50		10.00 - 13.00		17.50 - 29.00	10.50 - 19.50			
Turks & Caicos Islands															
U.S. Virgin Islands *		70.00	64.00		51.00		57.00	68.00	53.00	88.00	66.00	51.00 - 55.00	62.00	51.00	51.00

KEY: 1. Office Manager
2. Receptionist
3. Other Clerks, Typists

4. Head Waiter
5. Waiter/Waitress
6. Head Bartender

7. Bartender
8. Housekeeper
9. Maid

10. Head Cook
11. Cook
12. Seamstress, Laundress

13. Watchman, Driver
14. Bellboy, Yardboy
15. Gardener

Note: Islands giving minimum wage rates are marked with an asterisk; others give typical earnings (see 6.5 in text.)

TABLE 6F

Caribbean region

WAGE RATES - WEEKLY EARNINGS US\$ - 1971

	OFFICE		DINING ROOM		BAR	BEDROOMS		KITCHEN		SERVICES		OUTSIDE			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Antigua*	39.51	28.22	16.93 - 28.22	19.76	11.29 - 14.11	22.58	18.06	28.22	11.29	43.33	19.76	19.76 - 11.29	19.76	11.29	18.06
Bahamas															
Barbados*			20.00 - 22.00	24.00 - 26.00	16.00 - 22.00		19.00 - 26.00		14.00 - 16.00		16.50 - 22.00	13.00 - 14.00	21.00	14.00 - 16.00	
Bermuda*		67.60	58.60 - 78.60	68.88	45.12	82.24	71.68	81.60	45.12	90.40	90.40	66.60	70.06 - 81.60	45.12	68.60
British Virgin Islands															
Cayman Islands															
Dominica															
Dominican Republic															
Grenada															
Haiti															
Jamaica															
Montserrat				15.00 - 25.00	7.50 +	25.00	20.00		8.50		15.00	18.00		12.50	15.00
Netherlands Antilles															
Puerto Rico															
St Kitts*		25.00			7.00 - 11.00			7.50 - 10.00	20.00 - 25.00	12.50 - 17.50	7.50 - 10.00				7.00 - 12.00
St Lucia															
St Vincent															
Trinidad & Tobago			22.50 - 26.50		13.00 - 14.00		15.50 - 27.50		11.50 - 14.00		19.00 - 30.00	12.50 - 20.00			
Turks & Caicos Islands															
U.S. Virgin Islands		70.00	64.00		51.00		57.00	68.00	53.00	88.00	66.00	51.00 - 55.00	62.00	51.00	51.00

KEY: 1. Office Manager
2. Receptionist
3. Other Clerks, Typist

4. Head Waiter
5. Waiter/Waitress
6. Head Bartender

7. Bartender
8. Housekeeper
9. Maid

10. Head Cook
11. Cook
12. Seamstress, Laundress

13. Watchman, Driver
14. Bellboy, Yardboy
15. Gardener

Note: Islands giving minimum wage rates are marked with an asterisk; others give typical earnings (see 6.5 in text)

TABLE 66

Caribbean region

WAGE RATES - WEEKLY EARNINGS US\$ - 1972

	OFFICE		DINING ROOM		BAR	BEDROOMS		KITCHEN		SERVICES			OUTSIDE		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Antigua*	43.46	31.04	19.47 - 31.04	22.72	12.98	25.96	20.77	31.04	12.98	46.56	22.72	16.23 - 22.72	22.72	12.98	22.72
Bahamas*		74.00	50.00 - 65.00	90.00	38.00	65.00	63.00	80.00	42.00	110.00	82.00	50.00 - 60.00	63.50	31.00	80.00
Barbados*			22.00	26.00 - 27.00	17.00 - 22.00	20.00 - 27.00	17.00 - 22.00		15.00 - 17.00		17.50 - 22.00	14.00 - 15.00	19.50 - 22.00	15.00 - 17.00	
Bermuda*		71.20	62.20 - 82.20	72.48	48.72	85.84	75.28	85.20	48.72	95.80	95.80	70.20	81.20	48.72	72.20
British Virgin Islands	59.00 - 165.00	70.00				31.25 - 50.00			17.50 - 39.10	50.00 - 160.00	25.00 - 69.00	26.00 - 62.00			43.75 - 59.80
Cayman Islands															
Dominica*		20.00		13.00	11.50	22.00	12.50	11.00	9.00	37.50	19.00	9.00	17.50	8.00	10.00
Dominican Republic															
Grenada															
Haiti															
Jamaica															
Montserrat															
Netherlands Antilles															
Puerto Rico															
St Kitts															
St Lucia															
St Vincent															
Trinidad & Tobago*			22.50 - 32.00		14.00 - 19.00		17.00 - 27.50		12.00 - 18.00		20.00 - 30.00	13.00 - 25.00			
Turks & Caicos Islands															
U.S. Virgin Islands															

KEY: 1. Office Manager
2. Receptionist
3. Other Clerks, Typist

4. Head Waiter
5. Waiter/Waitress
6. Head Bartender

7. Bartender
8. Housekeeper
9. Maid

10. Head Cook
11. Cook
12. Seamstress, Laundress

13. Watchman, Driver
14. Bellboy, Yardboy
15. Gardener

Note: Islands giving minimum wage rates are marked with an asterisk; other give typical earnings (see 6.5 in text)

Caribbean region

TABLE 6H
WAGE RATES - WEEKLY EARNINGS US\$ - 1973

	OFFICE		DINING ROOM		BAR	BEDROOMS			KITCHEN		SERVICES		OUTSIDE		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Antigua*	46.06	32.90	20.64- 32.90	24.08	13.76	27.52	13.76	32.90	13.76	49.36	24.06	17.20 - 24.08	24.08	13.76	24.08
Bahamas*	-	74.00	50.00 - 65.00	90.00	38.00	65.00	63.00	80.00	42.00	110.00	82.00	50.00 - 60.00	63.50	31.00	80.00
Barbados*	--	-	22.00	26.00 - 27.00	17.00 - 22.00	20.00 - 27.00	17.00 - 22.00	-	15.00 - 17.00	-	17.50 - 22.00	14.00 - 15.00	19.50 - 22.00	15.00 - 17.00	-
Bermuda*	-	71.20	62.20 - 82.20	72.48	48.72	85.84	75.28	85.20	48.72	95.80	70.20	81.20	48.72	72.20	
British Virgin Islands															
Cayman Islands	-	-	-	-	20.00 - 44.00	80.00	60.00	-	20.00 - 37.00	60.00 - 70.00	35.00 - 40.00	-	-	-	-
Dominica*	-	20.00	-	13.00	11.50	22.00	12.50	11.00	9.00	37.50	19.00	9.00	17.50	8.00	10.00
Dominican Republic															
Grenada															
Haiti															
Jamaica															
Montserrat															
Netherlands Antilles															
Puerto Rico															
St Kitts															
St Lucia		15.00 - 30.00	10.00 - 45.00			20.00 - 30.00	13.50 - 20.00	50.00	8.50 - 15.00	25.00 - 50.00	11.00 - 40.00	9.00 - 20.00		8.00 - 17.50	8.50 - 17.50
St Vincent*					16.50		15.00		11.00		25.00			9.00	
Trinidad & Tobago			22.50 - 34.00		14.00 21.00		17.00 - 28.00		12.00 - 20.00		20.00 - 30.00	13.00 - 27.00			
Turks & Caicos Islands															
U.S. Virgin Islands															

KEY: 1. Office Manager
2. Receptionist
3. Other Clerks, Typist

4. Head Waiter
5. Waiter/Waitress
6. Head Bartender

7. Bartender
8. Housekeeper
9. Maid

10. Head Cook
11. Cook
12. Seamstress, Laundress

13. Watchman, Driver
14. Bellboy, Yardboy
15. Gardener

Note: Islands giving minimum wage rates are marked with an asterisk; others give typical earnings (see 6.5 in text)

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 7. INCENTIVES

7.1 Incentive Legislation

With the notable exception of Bermuda, all the islands in this survey offer incentives for investment in hotels. The most common form of legislation is a Hotel Aids Act, generally introduced in the 1950s, granting duty-free entry of building materials and equipment for hotel construction and operation to approved licence holders, as well as exemption from income, property and profits taxes for prolonged periods, usually about ten years. Incentive legislation enables governments to be selective about the hotels they wish to encourage and to lay down conditions about the planning, development and operation of the industry in return for financial concessions. However, most legislation does not restrain or direct hotel development as much as it might. Most legislation stipulates that duty-free imports must be used specifically in the construction or operation of the hotel and may not be disposed of without permission from the customs authorities. Developers are usually required to make an inventory of imported goods and to permit government inspectors access to their premises. Also, governments usually reserve the right to withdraw licences for concessions from developers who make fraudulent claims or misuse the materials. Some islands produce schedules of materials that may be imported duty-free.

Most Caribbean islands grant concessions only to hotels or establishments with ten or more bedrooms, catering to tourists. The British Virgin Islands, Turks and Caicos Islands, Montserrat and the U.S. Virgin Islands give incentives to smaller establishments. The Bahamas offers no incentives to small hotels in the already highly developed islands of New Providence and Freeport, and St. Kitts-Nevis offers more attractive incentives to large hotels than to small ones. Legislation in some of the islands requires that hotels contain a minimum number of bedrooms and provide centralised dining and eating facilities. Jamaica, St. Lucia and St. Vincent make such specifications. The Cayman Islands and Grenada do not define "hotels" in this way, but in implementing their laws, both territories have refused concessions to apartment and condominium-type accommodation. Both argue that the law was originally conceived to promote employment, which is generally higher in a conventional hotel than in an apartment block; therefore, they say, the spirit of the law requires that self-catering accommodation be excluded. Jamaica, in spite of high unemployment problems, has encouraged self-catering tourist accommodation, probably because these establishments attract an increasing number of visitors. The Cottage Incentive Act in 1971 granted similar benefits to cottages as to hotels.

Montserrat is the only island in the survey with a fairly old incentive ordinance not supplemented by a law giving benefits specifically to the hotel industry. The Montserrat Development Incentives Act may be used by any company that wishes to establish or expand an enterprise, provided that the company meets the financial, employment and time conditions specified in the Act. The Montserrat ordinance grants a comparatively short tax holiday of seven years and imposes more stringent conditions than do most ordinances. For example, Montserrat requires development companies to state when their construction activities and productive operations will start, the amount of capital they hope to expend in the concessionary period, how many persons they will employ and what provision will be made for housing them. In addition, the Montserrat Development Incentives Act allows an element of public participation not provided elsewhere even in the most recent hotel incentives legislation. Prospective developers must twice publish an outline of their schemes in the Island's newspaper, at a fortnightly interval, to enable the public to make objections to the Minister.

A number of islands have incentive legislation relating to "pioneer industries" or "development enterprises" in addition to hotel legislation. In general, the concessions to other economic sectors are similar to those granted the hotel industry, although in St. Kitts-Nevis, pioneer industries receive only a five-year tax holiday, equivalent to that given to small hotels. In Grenada, development companies receive a seven-year holiday, whereas hotels are entitled to ten years. "Development Incentives" and "Pioneer Industries" laws, i.e., those applying to investments other than in tourism generally contain restrictions similar to those imposed by the Montserrat legislation. These conditions could be applied to hotels to give governments greater power in relating hotel growth to national objectives. For example, speculative investments would be reduced if hotel incentive legislation required promoters to meet specific timetables for commencement of construction and operation of the hotel. St. Vincent already allows for a two-year provisional licence, granting concessions on customs duties to developers at the construction stage. When construction is complete, developers are granted a ten-year licence exempting them from taxation. Jamaica, the Turks and Caicos Islands, and the Dominican Republic insist that enterprises comply with a time schedule, but their laws have all been drafted recently.

Legislation of Antigua, The Bahamas, British Virgin Islands, Grenada, St. Kitts, St. Lucia, the Turks and Caicos Islands and the U.S. Virgin Islands provides that priority in jobs be given to local residents. The U.S. Virgin Islands' requirements are the strictest in insisting that all additional employment be given to local residents and if any posts are created which cannot be filled by islanders, immigrants are permitted to enter for three months to train local personnel. The Pioneer Industries legislation of St. Kitts-Nevis and Grenada, relating to other economic sectors, requires enterprises to submit returns of the number and of the normal place of residence of their staff. It would seem advisable to insist on similar returns from the hotel sector so that governments can assess their economic benefits. Montserrat and the Turks and Caicos Islands request licence applicants to state what provisions will be made for staff housing. This is essential in the small islands, where construction industries are small and can be quickly utilised to capacity. Hotel incentive legislation should also require developers to comply with overall physical plans of the islands and to produce detailed plans and architectural drawings of their schemes. Many laws state that applications must be accompanied by plans, drawings and reports, or, more vaguely, by whatever forms and documents the government may

prescribe. Too often, physical planning authorities, both government and UN sponsored, are not consulted when hotel development proposals are received, and consequently hotel location is not related to overall planning strategies.

The Dominica Development and Planning Corporation Act of 1972, and the Dominican Republic's "Promotion and Incentives for Tourism Development" Law of 1971 integrate incentive legislation with physical planning controls. The Dominica Development and Planning Corporation is the body solely responsible for planning. The Corporation may acquire, manage and dispose of land whether within or outside any designated area, may engage in any activity designed to promote the development of any designated area and may secure the proper development of such areas. At the same time, the Corporation may grant exemption from income tax and remission of customs duties within designated areas. The Dominican Republic's law is the most comprehensive piece of legislation governing hotel encouragement in the Caribbean. Its objective is to promote tourism development consistent with national goals and policies and to achieve the coordination of the private and public sectors. The law allows the Executive power to declare the entire national territory a tourist zone until such time as tourist zones can be demarcated according to environmental planning criteria. Developers are required to submit architects' plans with preliminary engineering details, prepared either by or through local professionals and only for areas within the tourist zones. The Executive may also grant exemption from customs duties and a ten-year holiday from income, construction, company licence and domestic purchase taxes.

Many hotel projects in the Caribbean do not materialise because the development companies are not financially sound. The new law for the Dominican Republic requires applicants to submit an economic feasibility study and projected cash flow document prepared by or through a reputable Dominican firm. The Jamaica Hotels Incentives law of 1968 requires that the Minister be satisfied that a project will be successful in respect of the manner in which it will be operated, availability of finances and the economic effects of its operations. These provisions could be introduced in most Caribbean islands. Pioneer industries and development incentives laws normally demand evidence of financial viability, but the hotel aids laws are generally far more relaxed.

The Dominican Republic legislation offers incentives for the development of all kinds of tourism facilities, not simply hotels, i.e., for: "Hotels, motels, inns, condominia, condo-hotels, apartment hotels, floating hotels, aquaminiums, restaurants, bars, and places for the sale of typical food; discotheques, nightclubs and other places of evening entertainment; sports clubs, country clubs, educational centres orientated towards tourism, recreational centres which include shops; shows, concerts and festivals; sea, land, or air transportation facilities destined for tourists or necessary for the development of tourism enterprises and which consequently can be classified as establishments available for tourism, and any other projects approved by the Directorate of Tourism Development." This could usefully be adopted in islands where large-scale tourism growth is envisaged. St. Lucia, Antigua and St. Kitts all have plans for tourism complexes involving more than the construction of conventional hotels.

Most Caribbean islands seem to have been so anxious to attract investors in the hotel sector that they have granted concessions for prolonged periods without questioning the suitability of location, economic viability, phasing, employment effects, design standards, infrastructure requirements, appropriateness of type or size of hotel to be built. Some exceptional cases do exist where hotels have forfeited their concessionary privileges or where applications have been refused. However, most hotels in the Caribbean seem to have been built with assistance from incentives legislation. Bermuda alone has never introduced legislation granting general concessions to hotels. Bermuda has been highly successful in attracting hotel development over a number of years, which casts doubt on the wisdom of other Caribbean islands, in giving rather indiscriminate assistance to developers and investors who might have been attracted to the region in any event and thus could have contributed more to the local economy through taxation.

7.2 Number of Hotel Beds Receiving Assistance

The number of beds receiving assistance under incentive legislation since its inception in each island is shown in Table 7A. The annual totals are shown below.

Number of Beds Receiving Assistance under Incentives Law

<u>To 1960</u>	<u>1960-65</u>	<u>1966-68</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
1564	1980	6402	4386	2730	4102	4908	724
			<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
Beds with assistance			9516	13902	16630	20734	25642
Total hotel beds			23871	27138	33521	36147	37865
% built with assistance			39.9	51.2	49.6	57.4	67.7

The table indicates that the proportion of beds built or proposed for construction under incentive legislation has increased more rapidly since 1968.

7.3 Recommendations

An investigation into the feasibility of adjusting existing incentive legislation in its different forms is recommended. The benefits and disadvantages to the territories of different types of incentives require analysis. The study should examine such alternatives as non-pecuniary incentives, e.g., concessions on work permits and alien landholding regulations.

TABLE 7A

Caribbean region

NUMBER OF BEDS IN RESORT ACCOMMODATION WITH ASSISTANCE UNDER INCENTIVE LEGISLATION

	1960 Estabs	Beds	1961 - 1965 Estabs	Beds	1966 - 1968 Estabs	Beds	1969 Estabs	Beds	1970 Estabs	Beds	1971 Estabs	Beds	1972 Estabs	Beds	1973 Estabs	Beds
Antigua	9	564	10	632	8	176	-	-	-	-	1	48	-	-	-	-
Bahamas																
Barbados	7 3	484 NA	11 8	280 NA	17 5	932 NA	19 -	1,006 -	7 2	504 NA	2 2	NA NA	1 3	32 NA	1	NA
Bermuda																
British Virgin Islands	2	52	1	NA	13 5	418 NA	4 2	196 NA	10	692	1	40	2	68		
Cayman Islands	7	312	3	152	3	250	3	74	-	-0	3	192	2	286	-	0
Dominica	-	-	3	118	-	-	1	40	2	72	1	14	2	120	-	0
Dominican Republic					NIL											
Grenada	1	66	2	72	3	84	2	108	1	40	2	400	2	64		
Haiti																
Jamaica				NA		3,812		1,520		484		1,518		3,874		
Montserrat			2	84	1	20					1	24				
Netherlands Antilles				366		428		630		76		0		88		
Puerto Rico																
St Kitts	-	-	3	98	2	60	-	-	1	44	2	64	3	236	1	160
St Lucia							NA		3	688	1	750	1	100	2	532
St Vincent	3	86	6	178	2	48	-	-	5	130	5	174	1	40	-	-
Trinidad & Tobago				NA												
Turks & Caicos Islands						NA					1	12	-	-	2	32
U.S. Virgin Islands				NA	2	174	5	812	0	0	4	866	0	0	0	0

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 8. THE SOCIAL IMPACT OF TOURISM

The social impact of tourism on developing societies has, until recently, attracted much less attention than the economic and financial effects. Few studies of social consequences exist, and the development of a methodology is still at an early stage. Considerable research is needed, preferably hand-in-hand with economic studies, because the social and economic consequences of tourism development frequently are closely integrated. Social development is not necessarily subordinate to economic growth, rather it can be planned and executed to seek identifiable, tangible and worthwhile social objectives. Moreover, such planned social development can be achieved by analysing and assessing the effects of economic development (such as tourism) before and during its realisation.

That the social impact of tourism is only now being seriously considered is surprising, because tourism is essentially concerned with the movement of, and contact between, people in different geographical locations. Seen in sociological terms, tourism involves:

- (i) social relations between people who would not normally meet;
- (ii) the confrontation of different cultures, ethnic groups, life styles, (possibly) languages, and levels of prosperity, etc.;
- (iii) the behaviour of people released from many of the social (and economic) constraints of everyday life. This phenomenon is enhanced because much tourism publicity is based on the idea of "getting away from it all";
- (iv) the behaviour of the host population, which has to reconcile economic gains and benefits with the costs of living with strangers (outsiders).

The degree and nature of the impact also should be measured against the way development of tourism is perceived. Attitudes may vary from outright hostility to the view that for many developing countries tourism offers the only realistic form of major economic advancement. The argument that tourism can be launched more quickly and effectively than other forms of economic development is countered by the view that tourism is subject to changes in fashion and, therefore, to changes in demand. Tourism may be regarded as a serious threat to local culture, social institutions and standards of craftsmanship and native art, or it may be seen as an opportunity for broadening social and cultural horizons. In short, the problem of attitudes and values needs to be studied.

A further problem arises from the serious deficiencies that now exist in the collection and analysis of statistical data. Most, if not all, Caribbean islands rely on the entry/departure card to provide basic data on visitors. Information thus obtained is often inaccurate and incomplete because of the different varieties of cards and the serious weaknesses in storing, handling and processing them. Improved E/D cards and new methods of data handling and pro-

cessing are needed to provide accurate, basic and quantitative data on tourism. Standardisation is also needed to make inter-island comparisons and regional/sub-regional aggregation possible.

Tourism development studies should include investigations of attitudes and values, and the collection of useful "social indicators." Relatively straightforward and limited sample surveys can be used to provide data and, if repeated at appropriate intervals, to monitor the degree of social impact. For example, development of tourism is sometimes alleged to bring about increases in crime, juvenile delinquency and social problems. Surveys conducted with the co-operation of local agencies could test this hypothesis. However, some aspects of social impact may require in-depth, intensive studies by sociologists and social anthropologists over a relatively long time period. As part of developing a methodology, an attempt should be made to identify those aspects of social impact that can be measured by limited surveys, and those requiring more prolonged study.

Tourism development normally requires the training of artisans and craftsmen for an expanded construction industry, technical training for hotel staff and basic training for service occupations such as typing, shorthand and book-keeping. This may in turn necessitate a general improvement in the basic educational level of the society. In certain situations, other forms of education may be very important, e.g., language training in the predominantly Spanish-speaking areas of the Caribbean, where English may not be widely used. Formal education of course may have a profound influence upon the attitudes and values of the young towards any form of economic development, including tourism and educational systems are not always appropriate to economic circumstances in all islands. Formal education is usually confined to the young, but formal and informal education of the adult population, through summer schools, different kinds of voluntary associations, and the like, is also important. The development of a flourishing structure of voluntary associations may serve to ameliorate any problems inherent in social and cultural contact in major tourism development. In addition, voluntary associations may serve as a vehicle to promote the participation of members of the host population in the development of tourism.

The most difficult and sensitive aspects of the social impact of tourism are, of course, political and race relations, with the two often interrelated. Although a serious evaluation has not yet been attempted, some assessment might now be possible from the growing body of sociological material on race relations in the Caribbean and elsewhere. Demographic rather than racial consequences could pose the most serious problems for economic and social development in the Caribbean. All tourism studies should include a demographic analysis of population growth and migration, in the context of tourism densities and of the social and economic costs of importing labour. Tourism development normally causes strains on social services, including housing and health, which should also be carefully costed.

Reference has been made to monitoring social impact. The benefits of establishing 'baselines' at an early stage in tourism planning, that can later be revised periodically, cannot be over-emphasized. Determining how such baselines can be established will require a great deal of empirical analysis. An immediate need is for accurate data on tourist numbers, consumption, travel patterns, length of stay, etc., since the degree and nature of the social impact of tourism will vary according to these and other characteristics.

Interaction of different political and cultural experiences on the economic structure has shaped the social environment of each island and therefore the impact of tourism is different in each. This impact is likely to be greater in these relatively distinct, small societies than it would be in a community with a large, dense, heterogeneous population. The social impact of tourism is not confined to the actual arrival of visitors. Often the long gestation period of planning, construction and promotion formulates attitudes to and generates aspirations about the sector. Tourism itself seems unlikely to initiate problems of social development, but it may exacerbate existing conditions, and planners and administrators have the responsibility and the opportunity to avoid the worst consequences of tourism development through sensitive planning.

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 9. TRANSPORTATION

It has not been possible to carry out a comprehensive inventory of transport facilities and services, but an attempt has been made to present a balanced view of the transport situation in the region. The following considerations represent the collective experience of members of Shankland Cox, who lived, worked and travelled in the Caribbean between 1967 and 1973.

9.1 General Introduction

Almost all international tourists travel by air from the main tourist generating areas to Caribbean resorts. The main exceptions are the sea transport routes from Florida to The Bahamas and the cruise ships plying the routes from the eastern seaboard of the U.S.A. to a number of Caribbean countries. Intra-regional tourists also rely heavily on air transport for access but, in some cases, such as travel between Puerto Rico and the Virgin Islands, sea transport is well established and offers regular services. Some shipping companies offer limited facilities for inter-island travel, especially in the Eastern Caribbean. Internal transport generally takes place by road, although sea transport is important in the Virgin Islands, The Bahamas and the group of islands around St. Martin. Domestic air services are developing in Jamaica, Dominican Republic, Haiti and the Turks and Caicos Islands and are already well developed in Puerto Rico, The Bahamas and the Virgin Islands.

9.2 International Air Transport

The development of air transport in the Caribbean has been associated with the growth of the tourism industry. The level of development achieved by the air transport industry probably owes more to tourism than to any other single factor. One exception is, for example, the growth of PRINAIR in Puerto Rico which has been related more to business requirements than to tourism. The early pioneers in tourism - Puerto Rico, The Bahamas, the Virgin Islands and Jamaica - have expanded facilities over a long period of time and generally in conjunction with the technical development of aircraft. These countries began their tourism development when aircraft construction was comparatively cheap and there was therefore no need for a single massive investment of a speculative nature. Similarly, the international airlines have grown gradually and their long established ground stations in the pioneer countries have not required any abnormal speculative investment. The airlines are controlled mainly by external companies or corporations and their main field of operations is also outside the Caribbean region. The decisions by which airlines purchase aircraft, establish ground stations and schedule services are, therefore, only slightly influenced by Caribbean considerations.

The location of the Caribbean vis-a-vis the main tourist generating areas influences the choice of aircraft that can be operated. Generally, most airlines use long range jets, such as the Boeing 707 and DC-8. Medium range jets such as the DC-9, BAC and Boeing 727 can be used only between the western and northern parts of the Caribbean and destinations in the United States. Long range aircraft are expensive to operate and generally are economical only if they carry reasonably full loads on long journeys. The highly speculative cost of providing expensive ground facilities for these aircraft must be paid by the countries concerned, and a single massive investment is generally required to build the long runways and strong taxi-strips and aprons. Antigua and St. Lucia are fortunate in that their airport facilities have been developed from old World War II airstrips. An island with mountainous terrain like Dominica would have great difficulty in finding a site that could be developed at a reasonable cost. Where the volume of air traffic is small, airlines are often reluctant to open up new ground stations on a speculative basis considering the present level of tourism and the costs of operating a new station.

Air carriers between the U.S., the main air traffic generating market for the Caribbean, currently are closely controlled by Civil Aeronautics Board (CAB) regulations. These regulations tend to favour the scheduled airlines and the low-cost charter group travel which is characteristic of western Europe has not yet developed. Consequently transport to the Caribbean is fairly expensive, so that it represents a major part of the total cost of a visitor's holiday. Domestic U.S. rates apply on travel to Puerto Rico and the Virgin Islands which are part of the United States and the considerably cheaper flights there from the U.S. mainland afford corresponding marketing advantages over other islands.

9.3 Intra-regional Air Transport

Intra-regional air transport is operated partly by international, partly by regional, and partly by local air carriers. Many airline schedules evolved as a result of now archaic political relationships that have ceased to have any significance in terms of current air travel patterns. The airlines experience acute problems in using available types of aircraft for short haul, low density routes. The financial problems of the airlines make it difficult for them to operate new services or improve their flight schedules. Furthermore the ground facilities provided for intra-regional travel, which vary from country to country, consist of facilities for medium haul jet aircraft, for medium haul prop jet aircraft and for small aircraft. Since at least three categories of aircraft are required to provide service to all countries in the region, the provision of a flexible and integrated service becomes difficult.

9.4 Sea Transport

Sea transport is not significant as a mode of transport for international or intra-regional tourists, except locally in The Bahamas and Virgin Islands where sea transport may be considered almost as much a part of the vacation as a mode of transport. For the most part in the Caribbean air travel is quicker, more convenient and comfortable.

9.5 Local Transport

The journey from point of entry to the accommodation is generally by road although, as outlined before, sea transport and domestic air services are important in certain areas. Generally, there is no shortage of transport facilities such as hire cars and taxis, but main roads are often well below the safety levels to which tourists are accustomed in their own countries.

9.6 Alternative Modes of Transport

The air transport industry is so well established that it is difficult to consider any other form of transport that would have significant appeal to international and intra-regional tourists or businessmen. At the local level, much time and money are being spent to create a road network. In many Caribbean countries priority is being given to improving roads between airports and tourist areas. Additional expenditure on such other transport modes as hovercraft or hydrofoils, which are not as flexible as road transport, are often difficult to justify. However, there could be a place for additional or alternative forms of transport in specific locations.

Conclusions

There is an urgent need for the preparation and adoption of a regional air transport strategy. This strategy could take into account the needs of each country in terms of its tourism policies and general accessibility, the viability of commercial aircraft operations; the costs and benefits of providing expensive airports; the regulations governing the licencing of flights, and the pricing of tickets; and the savings to be gained by making better use of existing transport infrastructure. Such a plan could be used as a framework within which governments, airlines, international funding agencies and private entrepreneurs could plan their investments and operations and should be flexible enough to accommodate changes in individual strategies.

PART I: THE REGIONAL PERSPECTIVE

CHAPTER 10. THE CONSTRUCTION INDUSTRY

Table 10A indicates average construction costs for different islands per unit of accommodation in hotels, villas and apartments. In some cases, building costs were estimated in dollars per square foot and cost per room was assessed on the rather arbitrary estimate of 500 square feet per room. Estimates varied according to the category of the building under construction, so separate figures are given for luxury and regular hotel accommodation. The need for a study of the construction industry in the Caribbean is evident in many reports on the Region. The main problems are high costs, limited capacity and productivity, and the absence of training programs. High costs result partly because most building materials are imported and the potential for import substitution and therefore reduction of transport expenditure should be investigated. The trend towards building large hotels and holiday villages has already been noted, so that it is essential to increase the capacity of local construction industries.

TABLE 10A

AVERAGE CONSTRUCTION COSTS IN U.S.\$ FOR

Caribbean region

ONE ROOM BY TYPE OF TOURIST ACCOMMODATION

ISLAND	1973	Hotel Room	Hotel room + central facilities	Hotel room + central facilities + furnishings (luxury)	(regular)	Villa room	Apartment	Change to cost since 1970
Antigua				42,500	35,000	25,000		
Bahamas					35,000	30,000	30,000-35,000	22.5%
Barbados				25,000	15,000-17,500		12-14,000 30-35,000	60%
Bermuda		12,000-15,000	24,000-30,000	35,000	27,500			
British Virgin Islands			18,600		21,600		39,500	20-25%
Cayman Islands		9,500 - 11,000	14,500	15,000	35,000		35,000	60%
Dominica				18,250	8,000-12,500	11,000 22,500		25-50%
Dominican Republic				-				
Grenada				-				
Guadeloupe				30-37,000 17-26,000	9-13,000			
Haiti				-				
Jamaica					21,600	4,000	4,000-6,000	
Martinique				28-37,000 17-20,000	9-13,000			
Montserrat					8,500			Fluctuation; no marked increase
Netherlands Antilles				21,700	5,000			
Puerto Rico			35,000		40,000			20%
St Kitts					22,500-27,500			
St Lucia				12,500	7,500	8,500	5,000-6,000	55%
St Vincent					7,000-8,000			
Trinidad & Tobago				20,000-37,500	5,000-7,500	15,000		
Turks & Caicos Islands					10,000 - 13,500			30%
U.S. Virgin Islands					-			

TOURISM SUPPLY STUDY - CARIBBEAN REGION

RECOMMENDATIONS FOR FURTHER STUDY AND POSSIBLE PROJECTS

Recommendations for further study are outlined briefly in this section. Their purpose is to identify information not now available and needed for effective planning.

1. The format of entry and departure cards needs revision and methods for simpler and more effective processing of tourism statistics should be devised; the information contained in this report requires periodic updating, preferably through standardised questionnaires and returns rather than through personal visits.
2. A standard hotel classification for the region should be drawn up.
3. Demand studies that include the following should be begun:
 - a. identification of geographical areas to which promotion should be directed and the type of tourist markets with most potential;
 - b. factors affecting average length of stay and level of tourist expenditure;
 - c. appraisal of facilities provided in the Caribbean in relation to demand;
 - d. evaluation of visitor impressions and of the image of tourist destinations in generating countries.
4. Study of tourism promotion techniques, sources of funds and of a regional promotional authority related to a regional tourism plan.
5. Study of the benefits and costs to a territory of different types and sizes of tourist accommodation, i.e., hotels, cottages, apartments, guest houses; the study should examine the implications of differences in direct and indirect employment, in accommodation revenues and total tourist expenditure associated with each type. The study could examine the financial and economic costs and benefits entailed in the operations of small and large hotels and their appropriateness to market demand, to local investment, entrepreneurial, manpower and natural resources.
6. Study of legislation that grants concessions to the hotel industry, examination of alternative incentive systems.

7. Economic linkage studies, in particular, studies of agricultural production, quality control and packaging and marketing techniques.
8. Regional manpower study for the tourism industry, recommendations on training policies and institutions.
9. Study of the construction industry concentrating on
 - a. costs and methods to reduce them;
 - b. capacity of the construction industry;
 - c. use of foreign labour resources;
 - d. levels of productivity and training requirements.
10. Transport communications study.
11. In-depth sociological and socio-anthropological studies of one or more islands with a developing tourism industry, over a period of years, to investigate the social impact of tourism.

As a result of these studies national tourism development plans could be drawn up - ideally for all islands and integrated into an overall regional policy, that incorporates plans for physical, economic, social and administrative development of the industry. Immediate action plans may be needed for those islands where rapid growth may lead to deterioration in environmental standards.

PART II: THE INDIVIDUAL ISLANDS

CHAPTER 1. EXISTING TOURIST ACCOMMODATION

ANTIGUA

Statistics

The Antigua Tourist Board keeps annual records of the numbers of hotel beds. Information about guest houses and cottages is incomplete. Rates sheets are available for 1972 and 1973 only.

Quantity of Accommodation and Past Trends

1973 data (Table 1.1) suggest that Antigua (and Barbuda) contains some 2,527 visitor beds in 1,256 rooms. Most resort beds, some 2,330 or 92%, are available in 32 hotels. In addition there are nine guest houses and 39 cottages catering to tourists. Available evidence indicates that the number of cottages increased from 28 in 1970 to 39 in 1973. The number of guest houses has changed by only one, from eight in 1968 to nine in 1973, with a decline in the number of rooms from 55 in 1968 to 43 at present.

Apartment accommodation is available to tourists in Antigua only through private sub-letting arrangements. Previous governments have opposed condominium development on the grounds that other, more conventional types of accommodation would generate more employment opportunities. The present government adopts the view that there is potential for large scale package holiday tourism similar to that occurring in Europe and is therefore formulating a condominium law. This implies that an increase in apartment accommodation could occur in the future.

Hotel accommodation (Table 1.2) has remained fairly static since 1970, only one hotel, the Atlantic Beach, was added in 1971. Renovations and extensions have been made at a number of hotels, notably the Marmora Beach, Hawksbill and C.B.C., where management has changed to the international chains (Holiday Inn, Club Caribee and Halcyon).

An increase of 146% in the number of hotels since 1960 was accompanied by a 270% expansion in the number of rooms, implying an increase in the average size of hotels. Nevertheless, average size (equivalent to 36 rooms in 1973) remains small. Sixteen of 32 hotels contained fewer than 24 rooms in 1973. Holiday Inn and Halcyon Cove are the only hotels with 100 or more rooms.

Table 1.1

ANTIGUA - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Rooms	Beds
1960	13	313	626											
1965	24	780	1,560											
1968	28	679	1,798	8	55	110								
1969	28	944	1,888											
1970	31	1,051	2,102	8	40	80	28	40	80				1,131	2,262
1971	32	1,027	2,062	8	40	80	30	45	90				1,112	2,292
1972	32	1,104	2,208											
1973	32	1,158	2,330	9	43	86	39	55	111				1,256	2,527

Source: Antigua Tourist Board
Rates Sheets 1972/1973

Table 1.2

ANTIGUA - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL		
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	
1960																			
1965																			
1968																			
1969																			
1970																			
1971	16	242	11	392	4	293	1	150									32	1,077	
1972 *	16	242	11	382	4	314	1	166									32	1,104	
1973	16	247	10	371	4	336	2	204									32	1,158	

* 1972 interpolated from 1971 and 1973 figures.

Source: Rates Sheets 1972/1973

THE BAHAMAS

Statistics

Statistical data are collected and analyzed by the Tourist Board within the Ministry of Tourism. The Tourist Board publishes an annual report indicating trends in visitor arrivals and the number of rooms available up to 1973. Rates sheets describe summer and winter accommodation available between 1970 and 1973. Annual totals compiled from the rates sheets do not exactly coincide with the figures published in the Tourist Board's reports. In particular, 1973 figures (which are available for the summer season only) are relatively low, probably because some visitor rooms close down in the summer. Rates sheets include all licensed accommodation but could exclude some resort accommodation in condominiums and privately owned villas. There are few condominium units outside Freeport, Grand Bahama.

Quantity of Accommodation and Past Trends

Nassau, New Providence, and Freeport, Grand Bahama, are the two largest resorts with a concentration of facilities. The Family Islands are considered collectively as the third area, although the islands are scattered and individualistic. Collectively, The Bahamas contain more tourist accommodation than any Caribbean territory except Puerto Rico. In 1972 there were an estimated 12,515 rooms or 24,182 tourist beds (Table 1.4).

Nassau contained 10,306 bedspaces for visitors in 1972, or 41% of The Bahamas total (Table 1.5). Of these beds, 92% or 9,430 were in 33 hotels, and 6%, or 662, were in apartments and cottages. Information about growth of accommodation since 1960 is incomplete. The Tourist Board's annual figures, which come from the rates sheets, suggest that hotel accommodation in New Providence increased 163% from 1,900 rooms in 1960 to 5,005 in 1972 (Table 1.3). The rates sheets, which give the only breakdown for the different categories, indicate little change in the accommodation available since 1970, with a small increase in hotel spaces and a slight decline in numbers of guest-house, apartment and cottage spaces. Examination of the size distribution of hotels (Table 1.9) shows that a large proportion of hotel rooms (57% in 1972) are in hotels with 300 or more rooms. About one third of the hotels have fewer than 50 rooms, comprising only 6% of all hotel rooms.

In Grand Bahama there were 9,162 bedspaces in 1972, representing 37% of accommodation in the islands (Table 1.6). Additional bedspaces in condominium units cannot be quantified. Licensed apartments and villas comprise 12% of Grand Bahama's accommodation; hotel bedspaces, 88%. Most of the self-catering accommodation is provided in apartments. From 1960 to 1973, the number of hotel rooms increased 1,074%. This massive increase from a relatively small base of 325 rooms in 1960 reflects the rapid development in all economic sectors in Freeport. Growth in hotel accommodation between 1970 and 1972, from 7,010 beds to 8,054 beds, was substantial, although there was no change in the total number of hotels. Hotels in Grand Bahama

are typically large; only two had fewer than 100 rooms in 1972 (Table 1.10). Average hotel size in Grand Bahama is 252 rooms, compared with 143 rooms in New Providence (Table 1.4) and 27 in the Family Islands (Table 1.11).

The Family Islands, consisting of Abaco, Andros, Berry Islands, Bimini, Cat Island, Crooked Island, Eleuthera Harbour Island, Spanish Wells, The Exumas, Imagua, Long Island and Salvador, had 4,714 beds in 1972 (Table 1.7). Comparing summer rates sheets for 1973 with winter 1972, the Family Islands showed greater seasonal differences in the amount of bedspaces available than did New Providence and Grand Bahama. Hotels in the Family Islands account for 59% of available tourist accommodation. Guest houses with 6% of the total, and apartments/villas with 35%, are much more significant here than in the two other resort areas. The number of hotels in the Family Islands grew by 440% between 1960 and 1972. This implies that hotels have expanded more rapidly here than in Nassau, but not as rapidly as in Grand Bahama. There has been a marginal increase in the number of hotel rooms since 1970, whereas guest house beds have doubled and self-catering units have increased by 270%. All hotels in the Family Islands have fewer than 200 rooms each (Table 1.11). Of the 50 hotels containing 54% of the total rooms, 45 have fewer than 50 rooms each.

Table 1.3

THE BAHAMAS - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	THE BAHAMAS			NEW PROVIDENCE			GRAND BAHAMA			FAMILY ISLANDS			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960		2,570			1,900			325			345				
1965		5,360			2,142			2,180			1,038				
1968		8,286			3,867			2,849			1,570				
1969		9,503			4,370			3,620			1,513				
1970		9,387			3,909			N. A.			N. A.				
1971		10,847			5,097			3,884			1,266				
1972	165	11,227	21,530	47	5,005	9,188	17	4,136	8,164	101	2,086	4,178			
1973															

Table 1.4

THE BAHAMAS - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified			Total			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960															
1965															
1968															
1969															
1970	90	9,317	18,634	28	236	472	376	757	1,514				10,310	20,620	
1971	89	9,228	18,456	27	238	476	477	954	1,908				10,420	20,840	
1972	105	10,326	20,652	42	320	640	983	1,869	2,890				12,515	24,782	
1973	96	9,706	19,412*	33	241	482	893	1,786	3,572				11,733	23,466	

* Summer rates . . . all 1973 figures may be underestimates.

Source: Rates Sheets

Table 1.5

NEW PROVIDENCE - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified			Total			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960															
1965															
1968															
1969															
1970	31	4,408	8,816	12	139	278	226	452	904				4,996	9,998	
1971	28	4,568	9,136	12	139	278	206	412	824				5,119	10,238	
1972	33	4,715	9,430	8	107	214	235	331	662				5,153	10,306	
1973	32	4,556	9,112*	8	96	192	237	474	948				5,126	10,252	

Source: Rates Sheets

* Summer rates. . all 1973 figures may be underestimates.

Table 1.6
 GRAND BAHAMA - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year

Year	Hotels		Guest houses		Cottages and Apartments		Unclassified		Total	
	Establishments	Rooms	Establishments	Rooms	Establishments	Rooms	Establishments	Rooms	Rooms	Beds
1960		325								
1965										
1968										
1969										
1970	16	3,505							3,505	7,010
1971	14	3,394							3,394	6,788
1972	16	4,027			277	554		1,108	4,581	9,162
1973	14	3,815			266	532		1,064	4,347	8,694

Source: Rates Sheets 1972/1973

Table 1.7
FAMILY ISLANDS - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year

	Hotels		Guest houses		Cottages and Apartments		Unclassified		Total	
	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Rooms	Beds
1960									--	
1965										
1968										
1969										
1970	43	1,404	16	97	150	305	610		1,806	3,612
1971	47	1,266	15	99	271	542	1,084		1,907	3,814
1972	56	1,584	34	213	471	984	1,120		2,781	4,714
1973	50	1,335	25	145	380	760	1,560		2,260	4,520

Sources: Rates Sheets

Table 1.8 .

THE BAHAMAS - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970	32	508	17	584	14	902	14	1855	4	970	5	2,081	4	2,417			90	9,317
1971	34	502	17	582	12	765	12	1,655	5	1,120	5	2,153	4	2,451			89	9,228
1972	45	649	19	681	11	764	15	2,018	5	1,176	5	2,046	5	2,992			105	10,326
1973	42	619	14	478	11	815	16	2,149	3	741	6	2,457	4	2,447			96	9,706

Source: Rates Sheets 1972/1973

Table 1.9
 NEW PROVIDENCE - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970	4	79	5	178	9	538	5	610	3	720	3	1,260	2	1,003			31	4,408
1971	6	100	2	76	6	357	5	610	3	720	4	1,668	2	1,037			28	4,568
1972	8	133	4	147	8	516	4	510	3	725	4	1,646	2	1,038			33	4,715
1973	8	134	3	103	7	465	6	772	2	490	5	2,057	1	535			32	4,556 *

* Summer rates, some closures

Source: Rates Sheets 1972/1973

Table 1.10
 GRAND BAHAMA - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970	2	29	3	106			6	885	1	250	2	821	2	1414			16	3,505
1971	1	10	1	40			7	1,045	2	400	1	485	2	1414			14	3,394
1972	1	20	1	40			8	1,162	2	451	1	400	3	1,954			16	4,027
1973					1	98	8	1,154	1	251	1	400	3	1,912			14	3,815

Source: Rates Sheets 1972/1973

Table 1.11
 FAMILY ISLANDS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

Size of hotel (rooms)	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL		
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	
1960																			
1965																			
1968																			
1969																			
1970	26	400	9	300	5	344	3	360									43	1,404	
1971	27	392	14	466	6	408	-	-									47	1,266	
1972	36	496	14	494	3	248	3	346									56	1,584	
1973	34	485	11	375	3	252	2	223									50	1,335	

Source: Rates Sheets 1972/1973

BARBADOS

Statistics

The Barbados Tourist Board is the main source for data relating to existing tourist accommodation. The distribution of total beds is given in rates sheets issued by the Tourist Board. Most do not agree with the Tourist Board's official estimates of accommodation. Tourist Board personnel comment that rates sheets should not be used to derive total accommodation figures because establishments containing as much as 10% of the total stock elect not to advertise through the Board. Small hotels, guest houses and self-catering units would seem more likely than larger hotels to be excluded from the sheets. The 1971 report, "The Tourist Industry in Barbados" by G. V. Doxey and Associates, classifies accommodation by type and estimates larger numbers for hotel and guest house beds than is indicated by the rates sheets (Table 1.13). It seems probable that the Tourist Board never has succeeded in counting all tourist accommodation in any of the categories; Tables 1.12 and 1.14, which were compiled from the rates sheets, should be read with this qualification in mind.

Quantity of Accommodation and Past Trends

Official estimates by the Barbados Tourist Board (Table 1.12) indicate 7,500 beds available in 1972, of which 4,128 or 55% were in hotels and 2,816 or 37.5% in apartments. This indicates a significant level of self-catering accommodation. Apartments are more numerous than cottages, reflecting the relatively high density of development along the south and southwest coasts of the Island.

Guest houses, which provided the same number of guest rooms in 1971 as in 1960, have grown in the last two years. In 1973, 17 guest houses provided 322 beds, compared with 10 providing 186 beds two years earlier.

The information about cottage accommodation is limited, but it appears that there has been no substantial growth since 1970, while apartments have grown from 485 to 766 in the three years 1969 to 1972. The Condominium Law recently passed in Barbados has stimulated construction of three apartment blocks containing 238 units; these were available for occupancy during the autumn of 1973 and the beginning of 1974. Most of the units have been sold already, indicating a ready demand for this type of accommodation.

There were 49 hotels in Barbados in both 1968 and 1973. There have been some fluctuations in the intervening years, but the number of tourist beds increased steadily from 3,746 in 1968 to 4,203 in 1973. None of the hotels in Barbados contains more than 200 rooms (Table 1.13). In 1972, 70% had fewer than 50 rooms, accounting for 40% of total hotel accommodation. The general pattern in the Caribbean has been for islands with the same level of tourism development as Barbados to have added one or more large hotels recently. The structure of the industry in Barbados, reflected in terms of hotel size, contrasts with Bermuda and the U.S. Virgin Islands, which had 2,900 and 2,600 hotel rooms respectively in 1972.

Hoteliers in Barbados report increasing difficulties in covering their operating costs, a view that gains sympathy from some sections of government. It would seem worthwhile to investigate whether their claim can be substantiated and if so, whether the difficulty is related to the management problems associated with a preponderance of small hotels, or to the tariff structure and the increasing number of package tourists.

Table 1.12

BARBADOS - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960	29	795	1,672	13	92	184									
1965	35	1,015	1,879	13	104	177						1,194			3,250
1968	49	1,947	3,746	11	97	176				686	1,528		2,724	5,450	
1969	48	2,023	3,973	12	113	213	485	777	1,574	265	530		3,178	6,290	
1970	50	2,103	4,200	12	115	230	827	1,108	2,442	64	128		3,390	7,000	
1971	49	1,987	4,044	10	92	186	862	906	2,081	445	889		3,430	7,200	
1972	44	2,048	4,128	15	133	257	938	1,332	2,816	150	299		3,663	7,500	
1973	49	2,010	4,203	17	168	322	850								

Source: Rates Sheets

Table 1.13
 BARBADOS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960	18	345	9	277	1	53	1	120									29	795
1965	20	305	8	254	6	344	1	112									35	1,015
1968	24	419	11	377	9	533	5	618									49	1,947
1969	22	357	11	370	9	569	6	727									48	2,023
1970	23	376	13	463	8	519	6	745									50	2,103
1971	20	311	10	396	7	429	5	635						7	216		49	1,987
1972	20	338	14	498	10	657	4	555									48	2,048
1973	21	331	14	473	10	648	4	558									49	2,010

Source: Rates Sheets 1972/1973

BERMUDA

Statistics

Statistics relating to the number of hotel beds available in Bermuda normally include two figures, the first indicating actual beds and the second capacity for bedspaces permitted under the licensing regulations. In this study only licensed hotels have been counted, and number of beds means existing beds; therefore, minimum estimates are given for hotel and guesthouse accommodation.

Quantity of Accommodation and Past Trends

Bermuda has 8,914 resort beds in 4,457 rooms. Of the beds, 6,787 or 76% are located in hotels (Table 1.14). About half of the other visitor beds are provided in cottages or apartments. Guest houses and so-called "cottage colonies" supply the remaining 12% of visitor accommodation. Cottage colonies consist of cottage units with facilities for preparing beverages and light meals, which generally are grouped around their own beach-pool and central facilities, including dining room, lounge and bar.

Total tourist accommodation in Bermuda doubled between 1960 and 1973. There is no information available about the composition of accommodation prior to 1968. Since 1968, when there were 18 guest houses with 570 beds, the number has increased to 26 with a decline in the number of beds to 449. Cottage colonies also had fewer beds in 1973 than in 1968, although the average size of a colony has increased: in 1968, 735 beds were available in 18 colonies, whereas in 1973 there were 590 beds available in seven colonies.

The fastest growth in tourist accommodation occurred in self-catering cottages and apartments, a trend observed in other islands. Cottages and apartments now comprise 12% of tourist accommodation.

The greatest increment, however, has occurred in the hotel sector. Some 2,768 hotel beds were added between 1968 and 1973. This growth contrasts sharply with Barbados and the U.S. Virgin Islands, where the number of hotel beds remained fairly static. (These countries are chosen for comparison because their accommodation stocks are similar in size to those of Bermuda).

Hotel Standards

Bermuda is the only island included in the study that has a law prescribing standards for hotel accommodation. The Hotels (Licensing and Control) Act of 1969 established regulations for "the operation and maintenance of hotels in a safe, hygienic and sanitary manner and condition, for the amenities to be provided and maintained and generally for the maintenance of standards in the operation of hotels for the protection and promotion of the tourist industry and in particular, but without prejudice to the generality of the foregoing -

- a) Regulating the number of persons who may be accommodated as guests in a hotel and in any room thereof;
- b) Prescribing standards of equipment for the sanitation of hotels, standards for the preparation and serving of food and drink in hotels and standards for the ventilation of hotels;
- c) For the medical examination of hotel employees, for restricting and controlling the employment in hotels of persons suffering from disease or infection or who have been in contact with persons suffering from disease or infection and for prescribing standards of personal cleanliness to be observed by hotel employees;
- d) Prescribing standards for the maintenance of the exteriors and interiors of hotels and the roads, pathways and grounds thereof;
- e) Prescribing the precautions to be taken against the outbreak or spread of fire in hotels and for the protection of persons therefrom;
- f) Prescribing the furnishings and fixtures to be provided in bedrooms and other rooms provided for the use of guests, and the standards to be maintained in connection therewith;
- g) Prescribing the manner in which any application may be made to the Member and the forms therefore;
- h) Prescribing the form of any licence or exemption granted by the Member or any notice given by the Member;
- i) For the keeping of registers and log-books by operators in relation to the operation of hotels;
- j) For the making of reports to the Member, the Health and Welfare Department, the Department of Planning and the Fire Commissioner upon any matters connected with the observance of the Regulations."

Table 1.11
 BERMUDA - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year

	Hotels			Guest houses			Cottage Colonies			Apart's/S.C. Cottages			Unclassified		Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establs.	Rooms	Beds	Establs.	Rooms	Beds	Rooms	Beds	-	Rooms	Beds
1960																2,220	4,440
1965																2,570	5,140
1968	16	2,010	4,019	18	285	570	18	367	735	154	308	615	118	236		3,088	6,175
1969																3,123	6,245
1970																3,420	6,840
1971	20	2,509	5,018	30	256	513	15	618	1,236	277	553	1,107				3,936	7,874
1972	20	2,943	5,887	28	245	490	14	560	1,119	269	538	1,076				4,286	8,572
1973	28	3,393	6,787	26	225	449	7	295	590	272	544	1,088				4,457	8,914

^{1/} SC - Self-Catering

Source: Rates Sheets and Tourism Dept's tourist arrival statistics

Table 1.15
 BERMUDA - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968	2	39	4	147	3	192	2	215	3	657	2	760					16	2,010
1969																		
1970																		
1971	3	48	6	219	3	214	2	270	3	680	3	1078					20	2,509
1972	2	32	6	230	3	214	2	288	3	766	4	1,413					20	2,943
1973			13	437	5	345	3	422	3	776	4	1,413					28	3,393

BRITISH VIRGIN ISLANDS

Statistics

The Tourist Board provided estimates of the number of hotel and guest house rooms in the Islands between 1960 and 1973. Existing accommodation in cottages and houses was obtained from estate agents and growth in apartments was taken from earlier studies by Shankland Cox (1970).

Quantity of Accommodation and Past Trends

The British Virgin Islands have a relatively small stock of tourist accommodation; accommodation totalled 977 beds in 1973 (Table 1.16). Hotel bedspaces account for 61% or 594; 98 or 10% are in guest houses, and 285 or 29% are in apartments.

During 1970 and 1971, the number of apartments constructed increased significantly, when Slaney Pools apartments, the Moorings and Treasure Island condominiums were built. This phase of activity followed the land reclamation project at Wickhams Cay and was associated with the Wickhams Cay Development Company. A number of apartments built initially for occupancy by tourists have been let to expatriate residents on a long-term basis owing to the lack of demand.

Guest house accommodation doubled, from 48 beds in 1960 to 100 beds in 1971; since when there has been no change.

Hotel beds have increased steadily since 1960, when only 52 beds were available in two hotels. In 1965 there were seven hotels with 264 beds, and in the next eight years, six more hotels were built, providing 330 beds. Thus, accommodation grew by 125% between 1965 and 1973.

The British Virgin Islands contain no large hotels (Table 1.17). Little Dix Bay with 66 rooms is the only hotel having 50 or more rooms.

Table 1.16

BRITISH VIRGIN ISLANDS - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Rooms	Beds
1960	2	26	52	4	24	48								
1965	7	132	264	4	26	52								
1968	9	188	356	5	31	62								
1969	9	188	356	5	31	62								
1970	10	210	420	6	36	72	28	56	100				302	592
1971	12	267	534	9	50	100	60	120	235				437	869
1972	12	267	534	9	49	98	86	161	285				477	917
1973	13	297	594	9	49	98	86	161	285				507	977

Source: Tourist Board and property agents.

Table 1.17
 BRITISH VIRGIN ISLANDS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960	2	26															2	26
1965	6	82			1	50											7	132
1968	8	122			1	66											9	188
1969	8	122			1	66											9	188
1970	8	112	1	32	1	66											10	210
1971	8	99	3	102	1	66											12	267
1972	8	99	3	102	1	66											12	267
1973	8	99	4	132	1	66											13	297

Source: Rates Sheets 1972/1973

CAYMAN ISLANDS

Statistics

Existing tourist accommodation was estimated from rates sheets, and opening dates of hotels reported by the Tourist Board. Because the Tourist Board's figures for total beds available each year contain inconsistencies, and have limited information about beds in different types of accommodation, data from rates sheets were preferred. Hotels listed in the rates sheets include only those registered with the Tourist Board. These are subject to an annual inspection to ensure that they provide the facilities advertised. The Tourist Board's list omits some 30 rooms contained in two small hotels and one apartment block.

Quantity of Accommodation and Past Trends

At present, the Cayman Islands possess 1,410 tourist beds of which 770 or 55% are located in 12 hotels (Table 1.18).

Guest house accommodation is not significant, accounting for only 26 beds. Villas and beach cottages provide 615 beds or 44% of all tourist accommodation. Apartments are not available to tourists and there is no condominium law.

The fastest growth since 1960 has occurred in the cottages and villas, with an increase from 68 to 318 beds in 1968, and 615 beds in 1973. The number of hotels has doubled since 1960, but the number of hotel beds has increased by 160% from 294 to 770, indicating an expansion in average size of hotel. Table 1.19 shows that hotels had fewer than 50 rooms in 1970, before the additions to La Fontaine/Royal Palms were made and before the Holiday Inn, with 125 rooms, was constructed.

Table 1.18
**CAYMAN ISLANDS - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year**

	Hotels		Guest houses			Cottages and Apartments		Total		
	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Rooms	Beds		
1960	6	147	294	1	7	14	34	68	188	376
1965	8	171	342	1	7	14	81	162	259	518
1968	9	216	432	1	7	14	159	318	382	764
1969	9	216	432	1	7	14	184	368	407	814
1970	9	216	432	1	7	14	217	434	440	880
1971	9	239	478	1	7	14	220	441	466	932
1972	12	385	770	2	13	26	307	615	705	1,410
1973	12	385	770	2	13	26	307	615	705	1,410

Source: 1972/3 Rates Sheets

Table 1.19

CAYMAN ISLANDS - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960	4	70	2	77													6	147
1965	6	94	2	77													8	171
1968	6	94	3	122													9	216
1969	6	94	3	122													9	216
1970	6	94	3	122													9	216
1971	6	94	2	77	1	58											9	229
1972	8	123	2	77	1	60	1	125									12	385
1973	8	123	2	77	1	60	1	125									12	385

DOMINICA

Statistics

There are few statistics relating to tourism facilities in Dominica. The Ministry of Development and Planning has recorded numbers of beds in hotels and guest houses since 1965. The Tourist Board is notified about some of the villas available for rent.

Quantity of Accommodation and Past Trends

Dominica has a small supply of tourist accommodation; there were 492 beds in 1973 (Table 1.20). A large proportion, 78% or 382 beds, is available in nine hotels, with an additional 78 beds in eight guest houses. Some seven privately owned villas are available for rent in the tourist season. There are a number of subdivisions with large lots, suitable mainly for high-cost housing that could provide self-catering accommodation. Development of the sector has not progressed as rapidly in Dominica as in Montserrat, Grenada and some other islands.

Tourist accommodation seems to have been non-existent in Dominica in 1960. Castaways and Island House (which opened in 1961) and Fort Young Hotel (which opened in 1964) pioneered the Dominica tourist industry. Since 1965 hotel accommodation has increased steadily as additional small hotels have opened. Fort Young, which expanded to 26 rooms in the late 1960s, was the largest hotel until Layou River hotel, with 46 rooms, opened in 1972. The small number and size of hotels emphasize the embryonic state of Dominica's tourism industry (Table 1.21).

Table 1.20
 DOMINICA - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960														
1965		34	68		15	30								
1968	4	50	100	7	25	50							75	150
1969	5	83	165	7	25	50								
1970	5	90	180	7	25	50								
1971	7	121	242	8	33	65								
1972	9	182	364	8	34	67	4	11	22				227	453
1973	9	191	382	8	39	78	7	16	32				246	492

Source: Min. of Development and Planning and Tourist Board.

Table 1.21

DOMINICA - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL		
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	
1960			0	0															
1965		34	0	0															34
1968	4	50	0	0														4	50
1969	4	57	1	26														5	83
1970	4	64	1	26														5	90
1971	6	95	1	26														7	121
1972	7	110	2	72														9	182
1973	7	119	2	72														9	191

DOMINICAN REPUBLIC

Statistics

Statistical information relating to the tourism industry was extracted from studies by INFRATUR and the Shankland Cox Partnership. The data available (Table 1.22) are somewhat limited. Only total numbers of hotel beds are given and it is implied that there is no visitor accommodation in guest houses, villas or apartments.

Quantity of Accommodation and Past Trends

The data suggest there is a relatively large stock of hotel accommodation, which totalled 3,612 beds in 1973. There was a 60% increase between 1960 and 1973, from a base of 2,218 beds. These additions are modest compared with other islands, but the base is relatively substantial. Information about the size distribution of hotels is not available. Some large hotels were built in the 1940s. Many were located inappropriately, and have low occupancy rates. Consequently, the age, size and growth of hotels in the Dominican Republic is quite unlike that in the rest of the Caribbean.

Table 1.22
 DOMINICAN REPUBLIC - Number of Rooms and Beds
 in Resort Hotels by Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified			Total			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960		1,109	2,218											1,109	2,218
1965		1,149	2,298											1,149	2,298
1968		1,196	2,392											1,196	2,392
1969		1,242	2,484											1,242	2,484
1970		1,442	2,884											1,442	2,884
1971		1,581	3,162											1,581	3,162
1972		1,641	3,282											1,641	3,282
1973		1,806	3,612											1,806	3,612

Source: Infratur and Shankland Cox.

GRENADA

Statistics

The Tourist Board maintains records of numbers of rooms in hotels, guest houses and cottages/apartments up to 1971. Rates sheets for 1972 and 1973 provide more recent information. The Tourist Board and the rates sheets seem to exclude some 80 rooms in those guest houses and apartments/cottages whose opening dates and exact categories are not known. In addition, there are high-cost housing subdivisions, notably at Westerhall Point, where most houses are owned mainly by expatriates and occupied only part of the year. These houses represent a potential supply of accommodation supplemental to the officially listed stock.

Quantity of Accommodation and Past Trends

The official estimates show 1,848 tourist beds in 1973, of which 1,120 beds or 61% were located in 20 hotels (Table 1.23). Cottages/apartments had the second highest total, with 526 tourist beds or 29% of the accommodation supply. The remainder, some 200 beds, were in guest houses.

The number of guest house beds has increased steadily from 40 in 1965 to 202 in 1973, but faster growth has occurred in apartments and cottages, particularly in the period 1965-1973, when beds increased from 82 to 526.

Growth in hotel bedspaces was also most rapid in the late 1960s. Since 1970, the number has increased slowly, from 970 to 1,120. Grenada continues to offer the majority of its accommodation in hotels that have fewer than 50 rooms each (Table 1.24). The Holiday Inn, with 186 beds, is the only hotel with more than 50 rooms.

Table 1.23
**GRENADA - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year**

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960														110	220
1965		214	428		20	40		41	82					275	550
1968		242	484		50	100		83	164					375	748
1969		332	664		65	130		253	506					650	1,300
1970		485	970		65	130		250	500					800	1,600
1971	20	521	1,042	12	78	156		255	510					854	1,748
1972	19	514	1,028	12	93	186		260	520					867	1,734
1973	20	560	1,120	12	101	202		263	526					924	1,848

Source: Tourist Board

Table 1.24
 GRENADA - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24 hotels rooms	25-49 hotels rooms	50-99 hotels rooms	100-199 hotels rooms	200-299 hotels rooms	300-499 hotels rooms	500 + hotels rooms	not classified hotels rooms	TOTAL hotels rooms	
1960										
1965										
1968										
1969										
1970										
1971	15	225	1	36	1	50	1	186	18	497
1972	13	191	2	63	1	50	1	186	17	490
1973	13	191	3	99	1	50	1	186	18	526

Source: Rates Sheets 1972/73

JAMAICA

Statistics

The Jamaica Tourist Board produces an annual bulletin of travel statistics, which indicates the number of rooms and beds available in hotels, guest houses, apartments and resort cottages. In addition, a hotel list for end 1972 indicated the size distribution of hotels and opening dates. Unfortunately, there are no lists for earlier years, nor is there information about extensions. This is significant, because many hotels added rooms in the period 1960-1972. Some errors were found in the list of 1972 hotel accommodation; when these were corrected, the annual total was 6,535 rooms (Table 1.31) rather than the published figure of 6,623.

Quantity of Accommodation and Past Trends

Jamaica contains five main tourist resort areas, and the metropolitan area of Kingston/St. Andrew. Montego Bay is the major tourist resort area, reporting 7,800 beds in 1972 (Table 1.27) followed by Ocho Rios and the North Shore, with 6,400 beds (Table 1.28). Kingston/St. Andrew had approximately 2,400 beds in 1972 (Table 1.26), and Port Antonio on the east coast some 900 beds (Table 1.29). Two less established resort areas, Mandeville/South Shore (Table 1.30) and Negril, had 440 and 50 beds respectively.

Out of the total 17,874 beds in 1972, 13,120 or (at most) 75% were in hotels, and 3,627 or more than 20% were in cottages (Table 1.25). The remaining 5% were in guest houses (487 beds), and apartments (640 beds).

Statistics showing distribution of beds among different types of accommodation were first published in 1965. The statistics indicate some strange trends in numbers of apartment and guest house beds, probably resulting from changes in definition and classification rather than from physical adjustments. For example, the number of beds in guest houses seems to have declined from 591 in 1965 to 364 in 1968, and to have risen to 487 in 1972; the number of beds in apartments appears to have increased from 384 in 1965 to 540 in 1968, then to have fallen to 296 in 1969 and 235 in 1970, and finally to have increased to 640 in 1972.

Expansion in the number of cottage beds seems to have been continuous and dramatic, from 762 beds in 1965 to 3,627 in 1972. Hotel beds have also increased rapidly since 1965, from a substantial base of 6,204 to 13,895 in 1973.

The average hotel in Jamaica has approximately 62 rooms (Table 1.31). In 1972, two thirds of the 106 hotels had fewer than 50 rooms, but 54% of the accommodation was in hotels with more than 100 rooms each. Large hotels provide a greater proportion of available accommodation in Ocho Rios and Montego Bay than in the lesser developed resort areas, and are more dominant in Ocho Rios and Montego Bay than in the Kingston/St. Andrew metropolitan area. However, the addition of large hotels in Kingston in 1973 suggests that this pattern may be changing.

The average size of new hotels opening each year since 1968 in Jamaica was as follows:

Year	Average Number of Rooms
1968	23
1969	48
1970	88
1971	67
1972	196
1973	275

KINGSTON/ST. ANDREW

Visitor accommodation in Kingston/St. Andrew mainly comprises hotel beds, which increased by 69% between 1965 and 1972 (Table 1.26). In 1972, 85% of visitor accommodation was in hotels. The newly built Pegasus Hotel (700 beds) and Port Henderson Hotel (400 beds) opened in 1974 and increased hotel beds available in the area by more than 50% within twelve months.

Sixteen hotels have fewer than 50 rooms, and two thirds of the available accommodation is in the four largest hotels (Table 1.32). Hotels with more than 100 rooms are a relatively new phenomenon in Kingston/St. Andrew, dating from 1971, when the Sheraton was extended and the Skyline Hotel was built.

MONTEGO BAY

Of the 7,795 visitor beds in Montego Bay in 1972, 6,137 or 79% were in hotels (Table 1.27). Cottage accommodation is also significant, with 1,451 beds accounting for 19% of the region's total. There are also some 200 visitor beds in guest houses and apartments.

The statistics suggest a decline in the number of guest house and apartment beds since 1965; however, cottages have clearly become a popular form of accommodation. Cottage beds have grown by 840% from 155 in 1965 to 1,451 in 1972. Beds in hotels have increased more moderately, growing by some 120%, to a total of 6,137 beds in 1972.

There are 49 hotels in the Montego Bay area (Table 1.33). The Holiday Inn at Montego Bay, with 558 rooms, is Jamaica's largest hotel. There are 20 hotels in the medium-range group (25-49 rooms each), containing a total of 669 rooms, while the eight hotels with between 100 and 199 rooms each provide a total of 924 rooms.

OCHO RIOS/NORTH SHORE

Ocho Rios and the North Shore had 6,403 beds in 1972, of which 65% were in hotels (Table 1.28). The most striking feature about visitor accommodation in this area is the large proportion of bedspaces in cottages. In 1972 there were 1,808 beds, or 28% of the total. The number of cottages is even greater in Ocho Rios than in Montego Bay. Apartment bedspaces have grown significantly since 1970. In 1972 they numbered 409 and represented 6% of total accommodation. There are only two guest houses, offering 14 beds.

Since 1968 the number of cottage bedspaces has grown by 110%, making cottage accommodation an important component in the area. In 1965 cottages provided only 16% of all accommodation, while the 869 cottage beds in 1968 comprised 27% of the total.

Hotel bedspaces have expanded at a slower rate in Ocho Rios than in Montego Bay: expansion in Ocho Rios between 1965 and 1972 was 94%, while in Montego Bay it was 120%. However, a large amount of construction presently under way in Ocho Rios could change the picture in the next two years. Nine hotels in Ocho Rios with between 50 and 99 rooms in 1972 had a total of 577 rooms (Table 1.34). The average size of hotel in Ocho Rios is high (104 rooms), and 62% of all hotel rooms available are in establishments with more than 100 rooms.

PORT ANTONIO

Port Antonio had 869 beds in resort accommodation at the end of 1972, of which 54% was in hotels and 38% in cottages (Table 1.29). Most of the other bedspaces were in two fairly large guest houses. The number of cottages tripled between 1965 and 1972; if current growth rates continue, cottages could soon become the dominant type of accommodation. The number of hotel beds has increased by 150% since 1965, and by 60% since 1968. Growth since 1968 has taken place by extension and renovation of existing accommodation, and no new hotels have been opened. Hotel accommodation is provided by five small hotels with fewer than 50 rooms each, and one hotel in Dragon Bay, which recently expanded to 102 rooms (Table 1.35). Guest house accommodation has remained static since 1965, a characteristic observed in other Caribbean resort areas.

MANDEVILLE/SOUTH SHORE

Mandeville and the South Shore contained 440 resort beds in 1972, almost all in hotels and guest houses (Table 1.30).

Total visitor beds have expanded by 130% since 1965, a trend similar to the growth for Jamaica as a whole. Hotel accommodation, however, has grown more dramatically, from 55 beds in 1965 to 346 in 1973. The average hotel is small (30 rooms), and all have fewer than 100 rooms (Table 1.36). Guest house beds have increased by 40%, from 77 in 1965 to 108 in 1973. The trend for cottage accommodation is unclear, but there seems to have been no growth since 1968. Mandeville/South Shore occupies a large geographical area, and the small number of visitor bedspaces, combined with the moderate growth rate in recent years, indicates that development pressures have not yet been experienced.

NEGRIL

Negril and the Southwest Coast area possesses one small hotel with 28 rooms (Table 1.36). Forms of tourist accommodation not listed in the Tourist Board guide include cottages, rooms in private houses and guest house accommodation, presently catering mainly to domestic tourists and young people from the U.S.A. These represent potential tourism facilities that could be made available to international tourists when demand increases.

Table 1.25

JAMAICA - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels		Guest houses			Cottages			APARTMENTS			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Rooms	Beds
1960														6,140
1965			6,204			591			762			384	4,152	7,941
1968	88	3,764	7,350	27	183	364	243	699	1,362	18	284	540	4,930	9,616
1969	95	4,352	8,413	29	190	374	340	969	1,867	18	144	296	5,655	10,950
1970	103	5,472	10,760	29	227	406	394	1,204	2,357	18	123	235	7,026	13,758
1971	107	6,116	12,099	35	276	501	489	1,452	2,821	28	278	548	8,122	15,969
1972	106	6,535	13,120	36	278	487	600	1,845	3,627	27	319	640	8,977	17,874
1973	102	6,264	13,895											

Source: Tourist Board

Table 1.26

KINGSTON/ST. ANDREW (JAMAICA) - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages			Total				
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds		
1960														
1965			1,192			313			19			96		1,620
1968	21	755	1,375	8	53	107	3	7	12	3	112	197	927	1,691
1969	24	839	1,478	13	80	158	3	8	15	3	84	168	1,011	1,819
1970	23	1,149	2,129	15	109	186	2	6	10	2	30	50	1,294	2,375
1971	22	1,137	2,122	19	141	245	2	6	10	4	62	114	1,346	2,491
1972	20	1,029	2,019	19	132	224	2	6	10	4	62	114	1,229	2,367
1973	23	1,648	3,244	10	76	129	-	-	-	1	10	20		

Source: Tourist Board

Table 1.27

MONTEGO BAY (JAMAICA) - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages			APARTMENTS			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960															
1965			2,617			121			155			246			3,139
1968	40	1,630	3,243	8	50*	100	52	148	293	9	128	255		1,956	3,891
1969	44	1,940	3,822	7	41	83	87	253	481	9	37	82		2,271	4,468
1970	48	2,493	4,987	5	30	61	106	333	651	7	29	59		2,885	5,758
1971	52	3,024	6,087	8	55	99	148	455	883	12	58	117		3,592	7,186
1972	50	3,007	6,137	7	49	90	219	733	1,451	12	58	117		3,847	7,795
1973	44	2,855	5,746	4	32	61	108	351	689	9	34	69			

Source: Tourist Board

Table 1.28
OCHO RIOS (JAMAICA) - Number of Establishments, Rooms and Beds in Resort Accommodation
 by Type of Accommodation and Year

	Hotels			Guest houses			Cottages			Apartments			Total	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Rooms	Beds
1960														
1965			2,150			37			415		42			2,644
1968	17	1,119	2,230	2	8*	14	153	447	869	6	44	88	1,611	3,201
1969	19	1,377	2,730	2	9	14	199	573	1,113	6	23	46	1,982	3,903
1970	22	1,547	3,089	2	8	13	234	719	1,413	9	64	126	2,338	4,641
1971	23	1,626	3,246	2	9	13	280	827	1,614	12	158	317	2,620	5,190
1972	24	2,086	4,172	2	9	14	312	920	1,808	11	199	409	3,214	6,403
1973	22	2,041	4,079	2	8	13	215	672	1,318	5	16	22	-	-

Source: Tourist Board

Table 1.29

PORT ANTONIO (JAMAICA) - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960															
1965			190			43			112						345
1968	6	153	302	3	25*	49	33	88	173					266	524
1969	4	98	196	3	25	49	49	126	243					249	488
1970	5	154	316	2	30	54	50	137	268					321	638
1971	5	193	388	2	31	54	57	155	299					379	741
1972	6	235	472	2	31	54	65	177	343					443	869
1973	6	239	480	2	31	54									

Source: Tourist Board

Table 1.30

MANDEVILLE/SOUTH SHORE (JAMAICA) - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960															
1965			55			77			61						193
1968	4	107	200	6	47	94	2	9	15					163	309
1969	4	98	187	4	35	70	2	9	15					142	272
1970	5	129	239	5	50	92	2	9	15					188	346
1971	5	136	256	4	40	90	2	9	15					185	361
1972	6	178	320	6	57	105	2	9	15					244	440
1973	7	181	346	7	61	108									

Source: Tourist Board

Table 1.31
 JAMAICA - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970																		
1971																		
1972	38	633	33	1,117	18	1,229	11	1,395	3	712	1	388	2	1,061			106	6,535
1973	35	591	29	942	18	1,184	12	1,557	4	905	2	750	2	1,061			102	6,490

Source: Tourist Board

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Table 1.32
 KINGSTON/ST. ANDREW (JAMAICA) - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970																		
1971																		
1972	12	210	4	142	2	129	1	160			1	388					20	1,029
1973	9	140	7	221	3	182	1	155	1	200	2	750					23	1,64

Source: Tourist Board

Table 1.33

MONTEGO BAY (JAMAICA) - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970																		
1971																		
1972	14	227	20	669	5	361	8	924	1	240			1	558			49	2,979
1973	14	236	14	458	7	490	7	873	1	240			1	558			44	2,855*

* Possibly some medium sized hotels not included in summer 1973 rates sheet.

Source: Tourist Board

Table 1.3h
 OCHO RIOS (JAMAICA) - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970																		
1971																		
1972	6	95	4	128	9	577	2	311	2	472			1	503			24	2,086
1973	5	87	4	113	7	446	3	427	2	465			1	503			22	2,041

Source: Tourist Board

Table 1.35
 PORT ANTONIO (JAMAICA) - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24 hotels rooms	25-49 hotels rooms	50-99 hotels rooms	100-199 hotels rooms	200-299 hotels rooms	300-499 hotels rooms	500 + hotels rooms	not classified hotels rooms	TOTAL hotels rooms
1960									
1965									
1968									
1969									
1970									
1971									
1972	2	3	1						6
		31	108	96					235
1973	3	2		1					6
		55	82	102					239

Source: Tourist Board

Table 1.36
 MANDEVILLE and NEGRIL & S.W. COAST (JAMAICA) - Number of Hotels
 and Hotel Rooms by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
<u>MANDEVILLE</u>																		
1972	4	70	1	42	1	66											6	178
1973	4	73	1	42	1	66											6	181
<u>NEGRIL & S.W. COAST</u>																		
1968																		
1969																		
1970																		
1971																		
1972			1	28													1	23
1973			1	26													1	26

Source: Tourist Board

Table 1.37
 JAMAICA - Number of New Hotels and Rooms
 by Size of Hotel Annually

	10-24 hotels rooms	25-49 hotels rooms	50-99 hotels rooms	100-199 hotels rooms	200-299 hotels rooms	300-499 hotels rooms	500 + hotels rooms	not classified hotels rooms	TOTAL hotels rooms
1960	13 259	9 306	9 696	7 877	2 472				40 2,610
1961									
1965	7 121	8 260		1 153		1 388			17 922
1966									
1968	10 154	5 158	1 50						16 362
1968	2 34			1 109					3 143
1969									
1969	5 77	3 90	2 156	1 160			1 558		12 1,041
1970									
1971	2 32	3 116	5 351		1 240				11 739
1971									
1972		2 84					1 503		3 587
1972									
1973					1 200	1 350			2 550

Source: Tourist Board

MONTSERRAT

Statistics

The Tourist Board's rates sheets for 1972 and 1973 contained information on the number of rooms available in hotels, guest houses and one apartment building. One hotelier's brief historical note on the development of the hotel industry, gives dates of opening and of room extensions to various hotels and guest houses. Three major real estate agents were approached for information on houses presently available for rent. Transport & Tourism Technicians Ltd. is another source for estimates of tourist accommodation in rented houses in 1971. Construction activity on subdivisions in Montserrat is reported in the Statistical Digest of 1973, which records the number of building permits issued.

Quantity of Accommodation and Past Trends

Montserrat's small supply of resort accommodation totalled 508 beds in 1973 (Table 1.38). Montserrat is unique among the Caribbean Islands, in that hotel beds comprise only 28% of total visitor beds and cottages, 65%. Three small guest houses and one apartment complex complete the accommodation stock.

Available cottages are located on a number of subdivisions developed for middle and high-cost housing by expatriates attracted to Montserrat. The number of cottages/houses for rent is difficult to state precisely, because individual owners may sublet their accommodation. Availability in this sector depends upon housing demand from residents, the proportion of expatriate and local purchases, and the amount of time spent in Montserrat each year by expatriate owners.

The Montserrat Statistical Digest indicates 338 houses in the island's subdivisions in 1971. It also implies that 60 houses were built or under construction in 1971, and an additional 71 were added or under construction in 1972. Transport & Tourism Technicians estimated 75 villas for rent in early 1972. Assuming all of them were located in subdivisions, apparently one of every four or five houses built was made available for tourists. Thus, construction of 60 or 70 houses annually would increase tourist accommodation in villas at a rate of 12-15 houses a year. Further investigation of subdivision development, both of existing accommodation and long-term trends, is needed in Montserrat and in a number of other Caribbean islands, so the size and potential of tourist accommodation in this sector may be quantified.

No new hotel has been opened in the last two years, since Caribel was started in 1971 with ten rooms. The Coconut Hill Hotel was operational in 1960, but with only nine rooms, has been classified as a guest house. In 1965 there were two hotels, which together provided 44 beds. Since then, 96 beds have been added (Table 1.38). Hotels in Montserrat are small; none has more than 24 rooms (Table 1.39).

A law to permit condominium construction was recently passed in Montserrat, and this could affect the structure of accommodation stock in the future.

Table 1.38

MONTSERRAT - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960	NIL			1	9	18									
1965	2	22	44	3	15	30									
1968	4	48	96	1	3	6									
1969	4	48	96	2	7	14									
1970	5	58	116	3	13	26	70	140	280						
1971	6	70	140	3	13	26	76	155	310				228	456	
1972	6	70	140	3	13	26	81	165	330				248	496	
1973	6	70	140	3	13	26	84	171	342				254	508	

Source: Tourist Board and property agents for cottages/apartments

Table 1.39
 MONTSERRAT - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960	NIL																	
1965	2	22															2	22
1968	4	48															4	48
1969	4	48															4	48
1970	5	58															5	58
1971	6	70															6	70
1972	6	70															6	70
1973	6	70															6	70

Source: Tourist Board

PUERTO RICO

Statistics

Statistics published annually by the Tourism Development Company relating to hotel and guest house accommodation give full coverage for the period 1960-73. Unfortunately, there is no reliable figure for cottages and apartments, although this is undoubtedly a very significant sector of the visitor accommodation supply in Puerto Rico.

Quantity of Accommodation and Past Trends

Puerto Rico has the largest tourism plant in the Caribbean Islands, characterized by large hotels and condominium apartment blocks.

In 1972, hotels and guest houses provided 18,900 beds, while 10% of the 15,000 apartments and condominiums throughout the island are estimated to have been occupied by visitors (Table 1.40). This implies that 1,500 apartment units, say 6,000 beds, were available to tourists and that apartments constituted about 25% of all resort accommodation. With its 25,000 resort beds, Puerto Rico had 4,000 more beds than the Bahamas and 7,000 more than Jamaica.

There is no information about growth in the number of apartments but guest house accommodation, which provided 878 beds in 1972, does not appear to have increased significantly since 1969. Guest house beds have expanded by 40% since 1960.

Hotel accommodation has grown steadily over the last 13 years, but the growth rate has slowed in the last five. Hotel beds increased by 135% between 1960 and 1965, and by 12% between 1968 and 1972.

In 1972 there were 9,001 hotel rooms in 64 hotels, an average of 141 rooms (Table 1.41). Compared with the rest of the Caribbean, Puerto Rico's hotels have always been large: average hotel size has grown from 86 rooms in 1960 to 124 rooms in 1965, and 134 rooms in 1968. Table 1.41 also shows that in 1972, 50% of the rooms were located in hotels with 300 or more rooms each, while less than 2% of the rooms were in hotels with fewer than 25 rooms. However, there were 18 hotels in the 25-49 rooms category, suggesting that Puerto Rico offers some variety in types of accommodation.

Table 1.10

PUERTO RICO - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960	32	2,750	5,500	28	312	624									
1965	52	6,469	12,938	32	308	616									
1968	60	8,054	16,108	35	365	730									
1969	58	8,123	16,246	39	421	842									
1970	60	8,529	17,058	40	434	868									
1971	64	8,337	16,674	42	484	968									
1972	64	9,001	18,002	39	439	878	1,500	3,000	6,000					12,440	24,880
1973															

Source: Tourism Development Company.

Table 1.41
 PUERTO RICO - Number of Hotels and Hotel rooms
 by Size of Hotel and Year

	10-24 hotels rooms	25-49 hotels rooms	50-99 hotels rooms	100-199 hotels rooms	200-299 hotels rooms	300-499 hotels rooms	500 + hotels rooms	not classified hotels rooms	TOTAL hotels rooms
1960	6 115	9 322	7 459	7 964	1 252	2 638			32 2,750
1965									
1968	8 156	16 608	11 812	12 1,769	3 690	9 3,467	1 552		60 8,054
1969	8 152	14 557	11 826	11 1,572	4 918	9 3,546	1 552		58 8,123
1970	7 141	15 587	12 982	11 1,886	5 1,155	9 3,556	1 552		60 8,529
1971	7 132	18 698	13 986	13 1,815	4 939	8 3,215	1 552		64 8,337
1972	6 1501	18 707	11 880	13 1,815	4 939	7 2,735	3 1,775		64 9,001
1973									

Source: Tourism Development Company

ST. KITTS/NEVIS/ANGUILLA

Statistics

Figures relating to total rooms in visitor accommodation were obtained from Tourist Board rates sheets, which may be incomplete but would omit no substantial or established accommodation. There are no statistics describing total accommodation available in St. Kitts, Nevis and Anguilla.

Quantity of Accommodation and Past Trends

In 1972, St. Kitts had 930 resort beds, of which 683 or 73% were in hotels, 140 or 15% in guest houses and 107 or 12% in cottages (Table 1.42).

There were 735 resort beds in 1971, which indicates that accommodation expanded by 27% in the next twelve months. This was due largely to the opening of the Holiday Inn with 132 beds, but a number of the more prominent hotels, including Fairview, Ocean Terrace, Pinney's Beach Hotel, Rest Haven Inn, Zetlands Plantation Inn and Nisbet's Plantation Inn, were opened between 1970 and 1973. Clearly, there has been much building activity in the last three years.

Hotels in St. Kitts are uniformly small (Table 1.43). Perhaps because the majority are converted plantation houses and old country houses, rather than purpose-built hotels. Holiday Inn and Fairview Inn, both of which opened in 1972, are the only hotels with more than 25 rooms.

St. Kitts has no apartment accommodation and no condominium law.

Table 1.h2

ST. KITTS - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified			Total			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960															
1965															
1968															
1969															
1970															
1971	17	268	533	11	52	101	27	49	101					369	735
1972	19	348	683	12	79	140	30	52	107					479	930
1973															

Source: Rates Sheets

Table 1.43
 ST. KITTS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24 hotels rooms	25-49 hotels rooms	50-99 hotels rooms	100-199 hotels rooms	200-299 hotels rooms	300-499 hotels rooms	500 + hotels rooms	not classified hotels rooms	TOTAL hotels rooms
1960									
1965									
1968									
1969									
1970									
1971	16	1	33						17 268
1972	17	1	33						19 350
1973									

Source: Rates Sheets

ST. LUCIA

Statistics

The St. Lucia Tourist Board publishes annual statistics, giving the number of rooms in hotels and apartments. Rates sheets are available for 1972 and 1973, but lists of hotels elsewhere in the Tourist Board literature suggest that these omit some small hotels and guest houses. The annual Tourist Board statistics appear to include guest house rooms and those hotels omitted from the rates sheets. There is insufficient data to check this assumption, so this report's estimates of total accommodation in St. Lucia may be slightly less than the actual figure. No distinction is made between the number of rooms in guest houses and those in hotels.

Quantity of Accommodation and Past Trends

Total accommodation available is estimated to have increased from 200 beds in 1960 to 2,948 beds in 1973 (Table 1.44). This indicates a 415% increase over the 572 beds available in 1968.

The 126 apartment beds constitute 4% of total accommodation.

Only hotels listed in the rates sheets can be examined for size and these sheets reveal that St. Lucia contains more large hotels than any other island in the Caribbean, with an equivalent amount of tourist accommodation: 706 hotel rooms, or 68% of the total, are in four hotels with more than 100 rooms each (Table 1.45). All four were built in the 1970s (Table 1.46).

Table 1.44

ST. LUCIA - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified			Total			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960														100	200
1965														230	460
1968														286	572
1969						16	32		320	640				336	672
1970						40	80		520	1,040				560	1,120
1971						40	80		810	1,620				850	1,700
1972	14	700				63	126		376	2,215				1,139	2,278
1973	15	1,035				63	126		376	2,822				2,474	2,948

Source: Tourist Board -

Table 1.45

ST. LUCIA - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970																		
1971																		
1972	7	94	3	136	2	100	1	120	1	250						14	700	
1973	7	94	1	47	3	188	3	456	1	250						15	1,035	

Source: Rates Sheets, Occupancy tax figures and Tourist Board statistics indicate some small hotels excluded.

Table 1.46

ST. LUCIA - Growth in New Hotels by Size
of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969																		
1970					1	88	1	190										
1971										250								
1972					1	50	1	164										
1973							1	102										

Source: Tourist Board

ST. VINCENT

Statistics

Available accommodation is estimated from rates sheets, 1964-1973. The Tourist Board inspects all hotels and has not approved two or three establishments, which are omitted in the lists. Figures for cottages and apartments are incomplete; records exist for 1973, and for 1964 from which 1965 totals are estimated. Accommodation in the Grenadines is included in the statistics for St. Vincent.

Quantity of Accommodation and Past Trends

There are estimated to be 1,021 tourist beds in St. Vincent of which 748 or 73% are in hotels (Table 1.47). Cottages and apartments, which contain some 200 beds, compose 20% of resort accommodation; these increased in number until 1969, then declined gradually.

There was a 150% expansion in cottage and apartment beds between 1965 and 1973, compared with 167% for hotel beds.

Three new hotels opened in 1973, providing a total of 44 rooms. The opening of two other hotels, the Bequia Inn and Low Man's Bay Hotel, scheduled for 1973, was delayed. All hotels are small, including the three recently opened. The largest hotels, Sugar Mill Inn and Friendship, have 25 rooms each (Table 1.48).

One hundred rooms in cottages and apartments were advertised for rent through the Tourist Board. As in many of the islands, a substantial number of private houses could be rented to tourists for part of the year, particularly in the Grenadine Islands (but information for only six cottages is available).

Table 1.47

ST. VINCENT - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels		Guest houses			Cottages and Apartments			Unclassified		Total	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds
1960												
1965	11	140	280	3	25	40	20	40	80		205	400
1968	16	236	441	3	30	42	30	60	80		326	563
1969	19	260	492	5	48	74						
1970	21	339	619	5	48	76						
1971	22	349	641	4	44	73						
1972	22	344	660	4	44	73						
1973	25	388	748	4	40	73	50	100	200		528	1,021

Source: Rates Sheets

Excludes 2 or 3 small hotels not recommended by Tourist Board

Table 1.48

ST. VINCENT - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965	11	140															11	140
1968	15	208	1	28													16	236
1969	18	207	2	53													20	260
1970	19	282	2	57													21	339
1971	20	294	2	55													22	349
1972	20	294	2	50													22	344
1973	23	338	2	50													25	388

Source: Rates Sheets

TRINIDAD AND TOBAGO

Statistics

Information about Trinidad and Tobago indicates no change in hotel and guest house accommodation between 1969 and 1972 (Table 1.49) and may therefore be inaccurate.

Quantity of Accommodation and Past Trends

The data indicate there are 3,056 hotels and 286 guest house beds. There is no figure for cottages and apartments and no comparative figure for the early 1960s.

The average hotel has 48 rooms (Table 1.50). More than half of the hotels have fewer than 24 rooms, but 43% of accommodation is in hotels having 100 or more rooms each. In general, Trinidad and Tobago have a variety of hotels of different sizes.

Table 1.49

TRINIDAD AND TOBAGO - Number of Establishments, Rooms and Beds in Resort
Accommodation by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Rooms	Beds
1960														
1965														
1968														
1969	32	1,528	3,056	6	143	286								
1970	32	1,528	3,056	6	143	286								
1971	32	1,528	3,056	6	143	286								
1972	32	1,528	3,056	6	143	286								
1973														

Source: Information received via IERD.

Table 1.50
 TRINIDAD AND TOBAGO - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969	18	269	4	138	7	464	2	215			1	442					32	1,528
1970	18	269	4	138	7	464	2	215			1	442					32	1,528
1971	18	269	4	138	7	464	2	215			1	442					32	1,528
1972	18	269	4	138	7	464	2	215			1	442					32	1,528
1973																		

TURKS AND CAICOS ISLANDS

Statistics

The Tourist Board is less than two years old and data for tourist accommodation prior to 1971 are not available. Opening dates and dates for extensions are not known. Rates sheets were first published in 1972; these give the number of beds and establishments available to visitors.

Quantity of Accommodation and Past Trends

The Turks and Caicos Islands have the smallest number of resort beds among the Caribbean Islands examined. Most of the accommodation is provided in seven small establishments, with minimum central facilities. Third Turtle Inn and Admiral's Inn have been classified as hotels (Table 1.52) because they contain more than 10 rooms. The other five establishments are considered to be guest houses, although the distinction is somewhat arbitrary. These seven establishments contain 140 beds; in addition, there are 20 beds in cottages on Pine Cay. Accommodation has expanded fairly slowly numbers in the past, from an estimated 74 beds in 1969 to 160 in 1973.

Table 1.51
TURKS AND CAICOS ISLANDS - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year

	Hotels		Guest Houses		Cottages and Apartments		Unclassified		Total	
	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Establishment's Rooms	Beds	Rooms	Beds
1960										
1965										
1968									37	74
1969									47	94
1970									50	100
1971	2	27	3	23		46			64	128
1972	2	35	4	29		58			64	128
1973	2	35	5	35	5	70	10	20	80	160

Source: Tourist Board

Table 1.52
 TURKS AND CAICOS ISLANDS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24 hotels rooms	25-49 hotels rooms	50-99 hotels rooms	100-199 hotels rooms	200-299 hotels rooms	300-499 hotels rooms	500 + hotels rooms	not classified hotels rooms	TOTAL hotels rooms
1960									
1965									
1968									
1969									
1970									
1971	2								27
1972	2								35
1973	2								35

Source: Tourist Board

U.S. VIRGIN ISLANDS

Statistics

Two sources provide conflicting data for existing and past resort accommodation in the U.S. Virgin Islands. Annual estimates from the Tourist Board differ slightly from rates sheets totals; the latter have been preferred in this study because they provide more up-to-date information.

Quantity of Accommodation and Past Trends

Rates sheets show 9,790 beds in 1973, of which 5,990 beds or 61% were in hotels (Table 1.53). Cottage and apartment accommodation is substantial and contributes 3,000 beds or 31% of the total. The number of resort beds expanded dramatically, from 3,063 beds in 1960 to 8,835 in 1970. Then there was a slackening in the growth rate, with only an 11% increase in three years.

Much of the growth since 1969 has resulted from the addition of cottage and apartment accommodation, bedspaces having increased from 551 to 3,000. Rather surprisingly, guest houses have become more numerous and in 1973 offered 800 bed spaces, compared with 378 in 1969.

Hotel accommodation has scarcely changed since 1969; the overall increase in beds was only 4%. An interesting trend is the decline from 67 hotels with 5,745 beds in 1969 to 49 hotels with 5,990 beds in 1973. Table 1.57 suggests that many small hotels have ceased to operate. Hotels with fewer than 25 rooms decreased from 34 in 1969 to 16 in 1973. The number of hotels with 25-49 rooms has declined marginally, from 18 to 15 in the same period. The numbers of medium sized and large hotels have remained fairly constant. Closer analysis of the rates sheets suggests an explanation for the trend towards fewer small hotels, i.e. many traditional hotels now offer efficiency units and self-catering facilities for rent.

The average size of hotel in the U.S. Virgin Islands is 61 rooms (Table 1.57), which is fairly large and very similar to the average size of hotels in Jamaica. Hotels with 100 or more rooms account for 50% of hotel accommodation. In 1969, when there were more small hotels, average hotel size was 44 rooms.

ST. THOMAS

The 5,430 visitor bedspaces on St. Thomas (Table 1.54) account for 55% of accommodation in the U.S. Virgin Islands. This has declined slightly since 1960, when St. Thomas provided 59% of the total accommodation. St. Thomas contains 62% of the territory's hotel beds, almost 88% of guest house accommodation, but only 33% of the cottages and apartments. Hotels are generally large, averaging 75 rooms (Table 1.58) and 79% of all the hotels in the U.S. Virgin Islands with more than 100 rooms are in this island.

ST. CROIX

St. Croix has 3,800 resort beds, or 39% of the territory's total (Table 1.56). In 1960 St. Croix provided only 35% of the accommodation in the U.S. Virgin Islands. There is a concentration of cottage and apartment accommodation in St. Croix, which accounts for 45% of the island's accommodation supply, compared with 53% of beds in hotels. Cottage and apartment beds have increased dramatically, from 200 in 1969 to about 1,700 in 1973. The increase is probably due mainly to the conversion of hotels into self-catering complexes. The average hotel size in St. Croix is 44 rooms (Table 1.59), considerably smaller than hotel size on St. Thomas.

ST. JOHN

There were 560 resort beds on St. John in 1973, compared with 177 in 1960 (Table 1.55). The majority of beds, some 300, are in cottages and apartments, but the focus of tourism facilities is a single hotel that contains 130 rooms (Table 1.60).

Table 1.53

U.S. VIRGIN ISLANDS - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels		Guest houses		Cottages and Apartments		Unclassified		Total (a)			Total (b)			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establs.	Rooms	Beds	Establs.	Rooms	Beds
1960															1,537 3,063
1965															2,206 4,345
1968															3,258 6,223
1969	67	2,917	5,745	21	191	378	237	373	551	118	239	3,599	7,003	3,424	6,793
1970	61	3,286	6,510	31	408	816	567	746	1,509			4,440	8,835	4,439	8,835
1971	52	2,976	5,960	33	422	850	1,332	1,520	3,100			4,918	9,910	4,307	8,932
1972	48	2,637	5,260	33	417	840	1,299	1,459	3,030			4,513	9,130	4,356	9,002
1973	49	3,011	5,990	31	384	800	1,242	1,450	3,000			4,855	9,790		

Source: (a) Rates Sheets
(b) Tourist Board

Table 1.54
ST. THOMAS (U.S. VIRGIN ISLANDS) - Number of Establishments, Rooms and Beds in Resort
 Accommodation by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total (a)			Total (b)	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Estabs.	Rooms	Beds	Estabs.	Rooms	Beds	Rooms	Beds
1960													867	1,819			
1965													1,236	2,505			
1968													1,821	3,579			
1969	37	1,644	3,200	18	169	338	111	183	251				1,996	3,789	1,996		
1970	35	1,877	3,750	25	337	676	77	210	437				2,424	4,863	2,423	174	
1971	24	1,581	3,200	28	374	750	488	600	1,200				2,555	5,150	2,555		
1972	24	1,500	3,000	28	370	740	421	500	1,000				2,370	4,740	2,370		
1973	25	1,865	3,730	26	350	700	419	500	1,000				2,715	5,430	2,715		

Source: (a) Rates Sheets
 (b) Tourist Board

Table 1.55

ST. JOHN - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total		
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	—	Rooms	Beds
1960														92	177
1965														164	303
1968														245	483
1969	1	130	260				54	90	190		37	69		257	519
1970	1	130	260				58	90	192					220	452
1971	1	130	260				69	100	200					201	434
1972	1	130	260				116	150	300					205	431
1973	1	130	260				105	150	300					280	560

Source: Tourist Board - totals.

Rates sheets - type of accommodation.

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Table 1.56

ST. CROIX - Number of Establishments, Rooms and Beds in Resort Accommodation
by Type of Accommodation and Year

	Hotels			Guest houses			Cottages and Apartments			Unclassified			Total	
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds	Rooms	Beds
1960													578	1,067
1965													806	1,537
1968													1,192	2,161
1969	29	1,143	2,285	3	22	40	72	100	200	81	170		1,346	2,695
1970	25	1,279	2,500	6	71	140	432	446	880				1,796	3,520
1971	27	1,265	2,500	5	48	100	775	820	1,700				2,133	4,300
1972	23	1,007	2,000	5	47	100	762	809	1,730				1,863	3,830
1973	23	1,016	2,000	5	44	100	718	800*	1,700				1,866	3,800

Source: Rates Sheets and Tourist Board

Table 1.57
 U.S. VIRGIN ISLANDS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969	34	610	18	637	7	493	6	772	2	415							67	2,917
1970	27	494	14	520	10	720	8	1,143	2	409							61	3,286
1971	18	328	15	540	10	721	7	978	2	409							52	2,976
1972	17	316	14	493	10	725	5	694	2	409							48	2,637
1973	16	295	13	519	9	669	6	799	2	409	1	300					49	3,011

Source: Rates Sheets and Tourist Board

Table 1.58
ST. THOMAS - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969	21	360	8	257	3	220	3	392	2	415							37	1,644
1970	19	348	5	183	4	307	5	630	2	409							35	1,877
1971	8	152	6	200	4	306	4	514	2	409							24	1,581
1972	8	154	7	239	4	318	3	380	2	409							24	1,500
1973	7	138	8	284	3	249	4	485	2	409	1	300					25	1,865

Source: Rates Sheets and Tourist Board

Table 1.59
ST. CROIX - Number of Hotels and Hotel Rooms
 by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969	13	250	10	370	4	273	2	250									29	1,143
1970	8	146	9	337	6	413	2	383									25	1,279
1971	10	176	9	340	6	415	2	334									27	1,265
1972	9	162	7	254	6	407	1	184									23	1,007
1973	9	157	7	255	6	420	1	184									23	1,016

Source: Rates Sheets and Tourist Board

Table 1.60

ST. JOHN - Number of Hotels and Hotel Rooms
by Size of Hotel and Year

	10-24		25-49		50-99		100-199		200-299		300-499		500 +		not classified		TOTAL	
	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms	hotels	rooms
1960																		
1965																		
1968																		
1969							1	130									1	130
1970							1	130									1	130
1971							1	130									1	130
1972							1	130									1	130
1973							1	130									1	130

Source: Rates Sheets and Tourist Board

Table 1.61
**NETHERLANDS ANTILLES - Number of Rooms and Beds in Resort Accommodation
 by Type of Accommodation and Year**

	Netherlands Antilles		Aruba			
	Establishm'ts	Rooms	Beds	Establishm'ts	Rooms	Beds
1960				211		422
1965				287		574
1968		1,934	3,868	593		1,196
1969		2,257	4,514	913		1,826
1970		2,856	5,712	981		1,962
1971		3,409	6,818	952		1,904
1972				996		1,992
1973						

Note: A breakdown of information for the Netherlands Antilles was available only for Aruba.

Source: Rates Sheets and Tourist Board

Table 1.62
 GUADELOUPE - Number of Establishments, Rooms and Beds in Resort Accommodation
 by Type of Accommodation and Year

	Hotels		Guest houses		Cottages and Apartments		Unclassified		Total	
	Establishments	Rooms	Establishments	Rooms	Establishments	Rooms	Establishments	Rooms	Rooms	Beds
1960	3	139	3	24		48				
1965	9	414	4	31		62				
1968	16	668	4	31		62				
1969										
1970										
1971										
1972	29	988	8	53		106				
1973	33	1,441								

Source: L'Office du Tourisme de la Guadeloupe

PART II: THE INDIVIDUAL ISLANDS

CHAPTER 2. VISITORS AND VISITOR CHARACTERISTICS, INCLUDING COUNTRY OF ORIGIN, AVERAGE LENGTH OF STAY AND TRANSPORT MODE

ANTIGUA

Statistics

Statistics are taken from the Antigua Tourist Board's records and are compiled from entry and departure cards. Antigua uses the standard international E/D card distributed in most Caribbean Islands.

Annual and Monthly Visitor Arrivals

Annual visitor arrivals by month are available for the years 1968 to 1972 inclusive (Table 2.1). The figures exclude cruise and inter-island shipping services passengers. Growth rates were most rapid in the early 1960s, averaging 9% annually between 1960 and 1972. In the period 1965-72, the average annual increase was 6.5%, with a more rapid growth between 1968 and 1972. The least successful year was 1970/71, when visitor arrivals expanded by only 3.5%.

Visitor arrivals are more numerous in the months December to March, but in the years 1971 and 1972, July-August was a significant secondary peak season. There are no figures indicative of which visitors travelling to Antigua were tourists, businessmen, or others.

Visitor Arrivals by Country of Origin

Statistics for 1968-72 (Table 2.2) show that more than 50% of visitors originate (i.e. are normally resident) in the U.S.A. or Canada. The proportion of visitors from North America fell from 67% in 1968 to 56% in 1972, although absolute numbers increased. The proportion of visitors from the U.K. has remained fairly static, at about 8% or 10%. The proportion of visitors from the Caribbean has increased most noticeably, from 20% in 1968 to 30% in 1971 and 1972. More than half of these visitors reside in Montserrat or the Associated States. Caribbean travellers include local businessmen, government officials attending conferences or other official functions and some tourists. Antiguanians are reported to take holidays in the neighbouring islands of St. Kitts-Nevis, Guadeloupe and Montserrat, and residents of these islands may holiday in Antigua.

Average Length of Stay

The statistics for length of stay indicate only whether visitors arriving by air stayed overnight, less than one week or more than one week. Visitors to the Caribbean are known to average between 3 and 14 days on an

island, so these statistics are not very helpful in determining exact length of stay. Bednight figures relate to hotels only and since the number of guests is unknown, average length of stay cannot be estimated of these travellers either.

Transport Mode

About 98% of stopover visitors arrive by air (Table 2.3). Antigua, unlike many neighbouring Caribbean Islands, has an international airport with direct services to North America and Europe. Consequently, about one fourth of the air arrivals stay only one night in Antigua before continuing their journey. This suggests that the number of tourist visitors to Antigua is considerably smaller than the number of visitors arriving at the airport.

Cruise ship visitors have increased rapidly, from 12,788 in 1968 to 63,784 in 1972. Cruise and inter-island shipping service passengers comprised 22% of all stopover and ships' visitors in 1968, compared with 47% in 1972. The Antiguan Government has been successful in its policy of encouraging cruise ships to the island.

Table 2.1

ANTIGUA - Annual and Monthly Visitor Arrivals

	1960	1965	1968	1969	1970	1971	1972
January			5,467	5,897	6,497	6,423	6,151
February			7,138	7,215	8,558	8,331	8,283
March			6,255	6,774	8,045	7,001	7,298
April			4,594	5,034	5,188	6,275	5,898
May			3,279	3,827	3,404	4,139	4,422
June			3,188	3,658	3,161	3,683	4,258
July			4,948	5,510	5,919	7,137	7,030
August			5,200	5,611	5,851	6,162	7,200
September			2,827	2,823	3,214	3,153	3,782
October			2,928	3,048	3,737	3,424	4,130
November			4,310	5,362	5,247	4,900	5,763
December			5,704	6,503	6,548	7,009	8,113
Total	25,380	48,651	55,838	61,262	65,369	67,637	72,328

Source: Tourist Board

Table 2.2

ANTIGUA - Visitor Arrivals and Country of Origin

	Numbers of visitors					% Distribution of Visitors				
	1968	1969	1970	1971	1972	'68	'69	'70	'71	'72
United States	30,296	32,276	31,706	30,552	32,456	54.4	52.7	48.5	45.2	44.9
Canada	7,473	7,536	7,107	6,958	8,397	13.4	12.3	10.9	10.3	11.6
United Kingdom	4,544	5,467	6,717	5,506	5,840	8.1	8.9	10.3	8.1	8.1
Associated States and Montserrat	5,425	6,792	8,382	11,358	11,089	9.7	11.1	12.8	16.8	15.3
French W. I.	972	1,237	1,620	2,165	2,056	1.7	2.0	2.5	3.2	2.8
Commonwealth Countries	770	1,303	1,779	1,221	1,433	1.4	2.1	2.7	1.8	2.0
Guyana	609	625	734	769	523	1.1	1.0	1.1	1.1	0.7
Jamaica	415	410	625	681	809	0.7	0.7	1.0	1.0	1.1
Trinidad and Tobago	1,504	1,613	2,326	2,669	2,870	2.7	2.6	3.5	3.9	4.0
South America	332	136	190	1,136	1,126	0.6	0.2	0.3	1.7	1.6
Netherlands W. I.	298	285	442	678	658	0.5	0.5	0.7	1.0	0.9
Europe	1,025	643	850	1,121	1,531	1.8	1.1	1.3	1.7	2.1
Barbados	1,150	989	1,200	1,831	1,925	2.1	1.6	1.8	2.7	2.7
All Other	<u>1,025</u>	<u>1,950</u>	<u>1,691</u>	<u>991</u>	<u>1,615</u>	1.8	3.2	2.6	1.5	2.2
TOTAL	55,838	61,262	65,369	67,637	72,328	100.0	100.0	100.0	100.0	100.0
Sub total Caribbean Countries	9,764	11,326	14,595	19,382	19,407	17.5	18.5	22.3	28.7	26.8

Table 2.3

ANTIGUA - Visitor Arrivals and Mode of Transport

	1968	1969	1970	1971	1972
Air	54,357	59,790	63,595	66,067	70,140
% of total by air and sea	97.3	97.6	97.3	97.7	97.0
Air passengers in transit		(11,834)	(14,530)	(17,283)	(17,040)
Air passengers in transit as % of sub-total *		(19.3)	(22.2)	(25.6)	(23.6)
Sea	1,481	1,472	1,774	1,570	2,188
% of total by air and sea	2.7	2.4	2.7	2.3	3.0
* Sub Total	55,838	61,262	65,369	67,637	72,328
No. of cruise ships	43	71	71	101	137
No. of cruise ship passengers	12,788	25,208	18,705	37,658	63,784
W.I. Shipping Service passengers	2,975	2,482	1,837	459	315
Cruise and W.I. Shipping service passengers as % of total visitors	22.0	31.1	23.9	36.0	47.0
Sub Total	15,763	27,690	20,542	38,117	64,099
Grand Total	71,601	88,952	85,911	105,754	136,427

Source: Tourist Board

THE BAHAMAS

Statistics

The research unit of the Ministry of Tourism publishes annual reports that include detailed statistics on visitor numbers and characteristics. Data are collected mainly from E/D Cards, which are also computer cards. An annual sample survey of departing passengers provides supplementary information.

Presentation varies annually, and in several cases the data are not comparable. Some discrepancies and changes are unexplained but assume significance because the volume of tourist visitors to The Bahamas is large.

Annual and Monthly Visitor Arrivals

There were 1,036,210 stopover visitors to The Bahamas in 1972 (Table 2.4), indicating that The Bahamas has the greatest number of tourists among the Caribbean Islands ^{1/}. In 1968, there were 818,994 stopover visitors, implying an average growth rate from 1968 to 1972 of about 6%. In 1969/70, the actual number of stopover visitors declined. The marked improvement in 1971 is explained in terms of economic growth in the U.S.A. and promotion of summer tourism through the Goombay festival.

Cruise ship passengers increased rapidly, from 253,219 in 1968 to 438,825 in 1971, but declined in the following year to 407,191. Nevertheless, cruise ship passengers comprised 28% of all visitors in 1972.

Statistics of total visitors to The Bahamas (including cruise, stopover and transit passengers) are available for the years 1960-71 (Table 2.7). The following table indicates that although growth rates have diminished progressively since the mid 1960s, they remain fairly high. It also emphasizes the fast growth of Grand Bahama and the relatively slow growth of the Family Islands. Since 1965 Grand Bahama has increased its share of all visitors entering the territory from 20% to 34%, while the New Providence share decreased from 60% in 1960 to 57% in 1971.

Annual average compound growth rates of visitor arrivals (including stopover, cruise and transit) to The Bahamas are as follows, in percentages:

^{1/} Puerto Rico has more stopover visitors, but a greater proportion of them arrive for business purposes.

First point of entry	1960-71	1965-71	1968-71
All islands	14.0	12.5	11.0
Freeport	-	23.0	17.5
New Providence	9.5	9.0	8.0
Family Islands	-	7.5	7.5

The pattern of monthly visitor arrivals in The Bahamas (Table 2.7) demonstrates the dominance of the traditional Caribbean tourist season (December-March) in the 1960s. However, there is a noticeable change in the pattern from 1969 to 1971, when July and August were most popular, registering more visitors than any of the winter months. Quarterly visitor arrival statistics suggest that a balance between seasons has now been achieved (25.2%, 26.5%, 26.0% and 22.3% chronologically in 1971). These figures indicate the success of the Government's policy of encouraging summer tourism, although September and October remain fairly slow months. Monthly arrival figures taken separately for New Providence, Grand Bahama and the Family Islands (Table 2.6) imply that seasonal differences are not significant between them.

Visitor Arrivals by Country of Origin

Table 2.8 reveals that the overwhelming majority of visitors to The Bahamas are residents of North America. While the number of U.S. residents dropped marginally from 88.3% in 1960 to 86.3% in 1972, the number of Canadian visitors increased from 6.6% to 7.3%. Visitors from other parts of the world constituted about 6% of all visitors to The Bahamas in 1972 and this proportion has not changed since 1960.

Some 320,000 visitors, or 25% of those from the U.S.A. in 1971 (Table 2.9), were residents of Florida which is the closest point to the Bahamas on the U.S. mainland. Another 25% of U.S. visitors were residents of the States of New York or New Jersey. Illinois, Pennsylvania, Michigan and Ohio each generated more than 50,000 visitors to the Bahamas in 1972. Two thirds of the visitors from Canada originate in Ontario and one quarter in Quebec.

Visitors from the U.K. in 1972 amounted to 1.7%, and an additional 1.3% were visitors from other West European countries. South America, Central America, Africa, Asia and Australasia each supplied fewer than 10,000 visitors (Table 2.10). There were some 11,000 from other Caribbean countries (Table 2.11), of whom about 60% came from Jamaica.

Average Length of Stay

The most recent estimates, taken from the 1971 annual report, indicate an average length of stay of 5.8 days in 1970 and 6.0 days in 1971 (Table 2.12). Monthly figures indicate that the shortest stays (4.6 to 5.3 days) occur in the slack months of May, September and October.

Average length of stay figures published in the 1970 report do not tally with 1971 figures, and there is no explanation for the differences. Comments in the 1971 annual report suggest that a trend towards a shorter stay was discernable in 1969 (Table 2.13), but this seems to have changed by 1971. Figures for 1972 suggest average length of stay increased from 6.0 to 6.2 days (Table 2.14).

The 1972 data compare average length of stay of visitors from different countries of origin. Table 2.14 shows that the average length of stay increases with distance from the Bahamas. Visitors from the U.K. stay 15 or 16 days on average, other Europeans stay 9 or 10 days, Canadians stay about 8 days and U.S. visitors, who generally travel the shortest distances, stay about 5.5 days.

More detailed statistics for U.S. visitors in 1971 (Table 2.15) confirm the hypothesis that the farther people travel, the longer they stay, since visitors from Miami average only 4.0 days, while visitors from California average 6.2 days.

Mode of Transport

The large and growing proportion of cruise ship passengers has been noted. Information from the 1971 annual report (Table 2.16) suggests that 39% of all arrivals in 1965 came by sea, compared with 34% in 1971. Non-cruise stopover sea arrivals totalled 57,000 in 1971 and comprised 6% of all stopover visitors (Table 2.19). There were 67,000 transit visitors in 1971, representing almost 50% of all visitor arrivals.

Table 2.4

THE BAHAMAS - Visitor Arrivals and Mode of Transport

	1968	1969	1970	1971	1972
Total Visitors (excludes transits)	1,072,213	1,307,396	1,243,344	1,396,643	1,443,401
Total Tourists (Air plus stopover Sea)	818,994	970,325	891,479	960,818	1,036,210
Total Cruise Visitors	253,219	337,071	351,865	435,825	407,191
Cruise ship passengers					
% of grand total					

Revised estimates

1969 - Assumes 25,000 stopover sea
25,000 air transits

1970 - Assumes 30,000 stopover sea
55,000 air transits

Source: Data for Annual Report 1972

Table 2.5

THE BAHAMAS - Percentage Breakdown of Visitors by Port of Entry

	1965	1968	1969	1970	1971	1972
Nassau	68.7	62.0	54.5	56.3	57.3	
Freeport	20.4	28.8	37.3	35.3	34.3	
Family Islands	10.9	9.2	8.2	8.4	8.4	

Table 2.6

THE BAHAMAS - Foreign Tourist Arrivals^{1/} by Month and Port of Entry

	Freeport			Nassau			Family Islands		
	1965	1968	1969	1965	1968	1969	1965	1968	1969
January		21,856	33,155		59,101	52,122		6,129 ^{2/}	8,274 ^{2/}
February		26,844	42,786		65,085	61,054		9,646	9,176
March		28,956	49,552		68,765	77,460		10,045	10,438
April		24,281	44,428		59,702	67,929		10,335	11,891
May		27,851	44,520		50,390	62,047		9,656	10,735
June		20,402	45,671		51,487	58,283		8,733	11,504
July		27,373	50,388		61,959	75,890		9,499	10,465
August		32,220	49,297		68,211	81,277		11,786	9,826
September		16,787	21,991		35,326	41,372		3,500	5,684
October		21,684	32,515		41,263	38,670		4,520	4,566
November		30,427	44,296		47,652	47,738		7,625	8,816
December		20,056	39,045		55,814	60,733		7,247	7,845
Total	147,037	298,737	497,644	494,552	664,755 ^{3/}	725,575	78,813	98,721	109,220

^{1/} Including cruise visitors and transits.

^{2/} Figures for 1968 and 1969 (Family Islands) were gained by subtracting the subtotals of Freeport and Nassau entries from the grand total. The addition of individual subtotals of the Family Islands results in a total larger than that published, but the mistake is statistically insignificant (e.g. for January 1969 +183, for February 1969 +533).

^{3/} Approx. from % figures.

Table 2.2

THE BAHAMAS - Annual and Monthly Visitor Arrivals ^{1/}

	1960	1965	1968	1969	1970	1971	1972	1973
January	29,159	63,766	87,086	93,511	104,840	109,590	114,083	110,216
February	37,207	67,574	101,575	113,013	112,944	126,291		
March	40,027	77,947	107,766	137,450	139,418	133,391		
April	34,708	60,856	94,318	124,248	108,176	147,274		
May	24,934	57,937	87,897	118,302	113,677	121,003		
June	26,714	56,622	80,622	115,458	109,236	119,463		
July	29,600	66,486	98,831	136,743	128,052	152,004		
August	29,810	65,944	112,217	140,400	130,243	151,961		
September	15,673	38,662	55,613	69,047	77,782	76,164		
October	19,819	46,276	67,467	75,751	76,760	99,377		
November	25,885	59,060	85,704	100,850	94,433	112,616		
December	28,441	59,290	93,117	107,623	102,783	114,457		
Total	341,977	720,420	1,072,213	1,332,396	1,298,344	1,463,591		

^{1/} "Total Tourist" arrivals include air arrivals, stopover sea, cruise visitors and transits.

Table 2.8

THE BAHAMAS - Visitor Arrivals and Country of Origin

1/

	1960	1965	% distribution of visitors ^{2/}				
			1968	1969	1970	1971	1972
United States	88.3	77.9	87.1	87.5	87.37	86.5	86.3
Canada	6.6	10.4	6.0	5.1	4.52	5.0	7.3
United Kingdom	2.1	4.5	1.7	1.4	1.32	1.3	1.7
W. Europe	-	-	1.2	1.5	2.04	2.2	1.3
Rest of World	3.0	7.2	4.1	4.5	4.75	5.0	3.5

1/ Percentage breakdown by region of origin, country of origin and country of residence are used interchangeably in the statistics.

2/ Absolute figure could be computed.

Table 2.9

THE BAHAMAS - Annual Visitor Arrivals from the U.S.A. by State of Residence, by Year

	1. Total Visitors from USA	1968 ^{1/}	1969	1970	1971 ^{1/}
	2. Percentage of U.S. Visitors				
Florida					
1		214,231	281,929	307,580	317,427
2		22.95	24.18	27.11	25.07
New York					
1		169,841	202,983	187,989	223,792
2		18.28	17.41	16.57	17.67
New Jersey					
1		61,621	76,342	73,836	90,190
2		6.59	6.55	6.51	7.12
Illinois					
1		53,674	62,535	55,724	61,413
2		5.75	5.36	4.91	4.85
Pennsylvania					
1		51,826	62,885	58,234	66,623
2		5.55	5.39	5.13	5.26
Michigan					
1		43,366	52,863	53,374	58,135
2		4.64	4.53	4.71	4.59
Ohio					
1		40,010	48,252	47,043	50,584
2		4.28	4.14	4.15	3.99
Massachusetts					
1		31,423	42,359	37,122	39,663
2		3.36	3.63	3.27	3.13
Connecticut					
1		24,478	35,185	29,462	31,185
2		2.62	3.02	2.60	2.46
California					
1		24,137	28,877	25,890	33,686
2		2.58	2.48	2.28	2.66
Other States					
1		219,519	271,688	258,148	293,494
2		23.50	23.30	22.76	23.18
Total U.S. Visitors		934,126	1,165,898	1,134,402	1,266,192

^{1/} It is uncertain whether the 1968 and 1971 figures are actual counts or projected figures.

Table 2.10

THE BAHAMAS - Visitor Arrivals by Region of Origin
(Excluding USA, Canada, UK and Europe)

	1969	1970
West Indies		
1 projected number of visitors	10,873	11,294 ^{1/}
2 % of the total	0.82	0.87
South America		
1	7,934	9,220
2	0.60	0.71
Central America		
1	6,146	6,754
2	0.46	0.52
Australasia		
1	5,683	3,359
2	0.43	0.26
East and South East Asia		
1	862	970
2	0.06	0.07
West Asia		
1	300	150 ^{2/}
2	0.02	0.01
Africa		
1	786	581 ^{2/}
2	0.06	0.04

^{1/} Does not include Bermuda.

^{2/} The 1970 category is Middle East:150 visitors (=0.01%) and is likely to include countries formerly grouped under Africa - which gives a possible explanation of the decline in numbers.

Table 2.11

THE BAHAMAS - Countries of Residence of Visitors from the West Indies

	<u>1972</u>
Barbados	285
Cayman Islands	115
Cuba	184
Haiti	134
Jamaica	6,755
Puerto Rico	1,093
Trinidad & Tobago	493
Turks Island	224
Virgin Islands	529
Other West Indies	<u>11,022</u>

Table 2.12

THE BAHAMAS - Tourist Arrivals by Length of Stay per Month - Total

	Surveyed visitors	Visitors days	Average length of stay (days)
JANUARY			
1970	77,146	458,043	5.94
1971	63,711	375,786	5.90
1972			6.31
1973			7.04
FEBRUARY			
1970	81,949	540,856	6.60
1971	75,742	465,957	6.15
MARCH			
1970	107,316	774,231	7.21
1971	85,019	537,945	6.33
APRIL			
1970	78,831	506,224	6.42
1971	101,621	602,080	5.93
MAY			
1970	85,683	444,673	5.19
1971	77,207	401,367	5.20
JUNE			
1970	76,250	407,211	5.34
1971	69,647	430,899	6.19

Table 2.13

THE BAHAMAS - Air Arrivals by Length of Stay, 1969

	Surveyed Visitors	Visitor Days	Average length of stay
1969			
JANUARY	68,250	388,566	5.69
FEBRUARY	78,811	479,649	6.09
MARCH	97,532	596,591	6.12
APRIL	87,171	468,932	5.38
MAY	86,655	409,725	4.73
JUNE	77,156	420,041	5.44
JULY	88,768	492,211	5.54
AUGUST	90,098	493,473	5.48
SEPTEMBER	51,190	268,046	5.26
OCTOBER	57,630	301,786	5.24
NOVEMBER	78,442	426,442	5.44
DECEMBER	87,576	604,418	6.90

Table 2.13 (Continued)

	Surveyed visitors	Visitors days	Average length of stay (days)
JULY			
1970	95,909	532,080	5.55
1971	95,656	602,852	6.30
AUGUST			
1970	94,234	472,742	5.01
1971	91,368	551,551	6.04
SEPTEMBER			
1970	56,494	283,467	5.02
1971	43,763	236,748	5.41
OCTOBER			
1970	60,198	279,259	4.64
1971	61,606	323,661	5.25
NOVEMBER			
1970	71,632	373,329	5.21
1971	72,595	406,478	5.60
DECEMBER			
1970	79,167	513,669	6.49
1971	79,798	580,319	7.27
TOTAL AVERAGE STAY			
1970	964,809	5,585,784	5.78
1971	917,733	5,515,643	6.01

Table 2.14

THE BAHAMAS - Average Length of Stay and Country of Residence

	<u>1971</u>	<u>1972</u>
U. S. A.	5.5	5.6
Canada	7.9	8.3
Europe	8.7	9.1
U. K.	15.6	15.1
Rest of World	9.3	10.0
Total	<u>6.0</u>	<u>6.2</u>

Table 2.15

THE BAHAMAS - Points of Residence by Total Visitors and Average Length of Stay, 1971

	No. of Visitors	Visitors days	Average length of stay
<u>Florida</u>			
Miami	165,827	668,283	4.03
Orlando	19,694	96,501	4.90
Daytona Beach			
Tampa	32,323	159,999	4.95
St. Petersburg			
West Palm Beach	<u>27,954</u>	<u>143,124</u>	5.12
Subtotal	245,798	1,067,907	4.35
<u>New York</u>			
New York	237,086	1,085,854	4.58
<u>Illinois</u>			
Chicago	50,779	294,518	5.80
<u>Pennsylvania</u>			
Philadelphia	45,282	221,182	4.89
Pittsburgh	<u>14,214</u>	<u>83,436</u>	5.87
Subtotal	49,496	304,618	5.12
<u>Michigan</u>			
Detroit	38,968	213,155	5.47
<u>Ohio</u>			
Cleveland	21,323	122,181	5.73
<u>Mass.</u>			
Boston	26,459	158,489	5.99
<u>California</u>			
Los Angeles	16,048	99,658	6.21
<u>Georgia</u>			
Atlanta	18,848	85,758	4.55
Washington, D. C.	22,987	129,876	5.65
TOTAL	<u>737,792</u>	<u>3,562,014</u>	<u>4.83</u>

Table 2.16

THE BAHAMAS - Visitor Arrivals and Mode of Transport

	1965	1968	1969	1970	1971
Air	440,338	818,994	970,325	916,479	970,965
% of stop-over visitors	61.1	76.4	72.8	70.6	66.3
Sea	280,082	253,219	362,071	381,865	492,626
% of stop-over visitors	38.9	23.6	27.2	29.4	33.7
Grand total	720,420	1,072,213	1,332,396	1,298,344	1,463,591

Source: Annual Report 1971 includes transit visitors

Table 2.17

THE BAHAMAS - Tourist Arrival and Transport Mode: Nassau, Freeport, Family Islands

		1960	1965	1968	1969	1970	1971	1972
Nassau	Air			453,246	527,224	507,984	548,967	
	Sea			221,509	198,351	222,627	289,219	
	Subtotal			674,755	725,575	730,611	838,186	
Freeport	Air			295,117	358,360	324,688	330,864	
	Sea			3,620	139,284	133,967	171,744	
	Subtotal			298,737	497,644	458,655	502,608	
Family Islands	Air			70,631	84,741	86,820	91,134	
	Sea			28,090	24,479	25,841	31,663	
	Subtotal			98,721	109,220	112,661	122,797	
Total Air				818,994	970,325	919,492 ^{1/}	970,965	
Total Sea				253,219	362,114 ^{1/}	382,435 ^{1/}	492,626	
Total				1,072,213	1,332,439	1,301,927	1,463,591	

^{1/} Subtotals add up to more than the grand total - see Table 2.16

Table 2.18

THE BAHAMAS - Tourist Arrivals and Transport Mode, 1971

	Air	Stopover Sea	Total Tourist	Cruise Visitors	Total Air & Sea	Transits	Total
January	66,105	2,598	68,703	37,149	105,852	3,738	109,590
February	79,108	2,881	81,989	40,465	122,454	3,837	126,291
March	87,407	3,285	90,692	38,233	128,925	4,466	133,391
April	98,659	4,298	102,957	39,802	142,759	4,515	147,274
May	75,307	5,868	81,175	32,907	114,082	6,921	121,003
June	63,673	8,834	72,507	39,496	112,003	7,460	119,463
July	84,025	5,926	89,951	53,336	143,287	8,717	152,004
August	85,845	11,016	96,861	46,660	143,521	8,440	151,961
September	44,249	2,967	47,216	22,020	69,236	6,928	76,164
October	62,342	3,339	65,681	28,114	93,795	5,582	99,377
November	73,890	3,876	77,766	31,621	109,387	3,229	112,616
December	83,407	1,913	85,320	26,022	111,342	3,115	114,457
Total	904,017	56,801	960,818	435,825	1,396,643	66,948	1,463,591

BARBADOS

Statistics

Tourist Board information is derived from aviation movements and entry and departure cards. Barbados uses the standard E/D card common throughout the Caribbean. The Statistical Service conducts an annual survey of bednights in tourist accommodation, which yields information about visitors in hotels, guest houses and apartments.

Annual and Monthly Visitor Arrivals

Stopover visitors to Barbados numbered 210,430 in 1972. The high annual average growth rate of 16% since 1960 was sustained into the early 1970s. But total stopover visitors increased by only 11% in 1972 and monthly statistics for 1973 indicate that the slowdown may be continuing. Barbados seems to have been unaffected by slower growth in the U.S.A. in 1969-70 and, although rates of visitor growth are now decreasing, they remain high in comparison with other Caribbean islands.

Stopover visitors are frequently equated with tourists in the statistics. The analogy is appropriate since a table showing purpose of visit for stopover visitors in 1971 indicated that 98.6% were on holiday, 0.8% private business visitors and 0.4% students. Transit, official business and other visitors constituted fewer than 0.2% of the total.

Monthly distribution of visitor statistics are available for 1968, 1969 and 1971 (Table 2.19). The figures imply that arrivals in January and February almost doubled between 1968 and 1971. There was a tendency for seasonal differences to become more marked in the period 1968-71, due mainly to fast growth in the numbers of winter visitors. In 1969, August was the peak visitor month, but in 1971 it was surpassed by December and February and equalled by January.

Visitor Arrivals by Country of Origin

The pattern of arrivals by country of origin (expressed in terms of country of residence) has changed markedly since 1960, reflecting the growth in tourists from North America (Table 2.20). In 1960, the largest group of visitors came from other Caribbean Islands (43%), with 18% of visitors originating in Trinidad and 16% in the Leeward and Windward Islands. In contrast, the Caribbean countries accounted for only 20% of visitor arrivals in 1971.

North American visitors increased from 38% in 1960 to 64% in 1971. Visitors from Canada also increased dramatically, equalling 27% of all visitors in 1970. U.K. visitors have declined in number proportionately since 1968 and constituted only 7% in 1971.

Table 2.21 shows that North Americans, particularly Canadians, typically visit Barbados in their winter months, whereas visitors from other Caribbean Islands reach their peak in July and August. The distribution of Caribbean visitors to Barbados by month is irregular and suggests that Barbados is a year-round tourist resort area for residents of neighbouring islands, particularly Trinidad, the Leeward and Windward Islands, and the French West Indies, and Guyana.

Average Length of Stay

The annual bednight survey of hotels and guest houses provides estimates of average length of stay from 1968 to 1972 (Table 2.22). This survey is useful, since it covers almost 90% of hotel and guest house beds. However, not all visitors to Barbados stay in hotels and guest houses, so average length of stay cannot be measured from the survey. The 1971 bednight survey (Table 2.23) covered 94,665 hotel and guest house visitors, about 50% of all visitors to the island.

The 1971 survey suggests an average stay of about 6 or 6.5 days, which has not changed since 1968. There is some evidence that visitors stay longer in the winter season than for the rest of the year (Table 2.23 indicates an average length of stay of 7.1 days in February/March 1971).

Guests to luxury hotels seem to stay slightly longer than do guests in 'A' and 'B' type hotels. Visitors to guest houses stayed longer than hotel guests on average until 1972, when there was a change in trends, with visitors staying only six days on average.

Data from the E/D cards for 1971 indicate the number of visitors staying less than one week, for one to two weeks, etc. In 1971, 45% of stopover visitors stayed less than one week, and 80% less than two weeks. Length of stay figures for visitors from different countries of residence indicate that those from the most distant points are more likely to stay longer than one week. For example, 71% of Canadian visitors stayed longer than one week, compared with 46% from the U.S. Similarly, 71% of U.K. visitors stayed longer than one week, compared with 45% of West Indian visitors.

Mode of Transport

There are no statistics showing the proportion of stopover visitors arriving by air, except for 1969, when sea arrivals were relatively insignificant (2.5%). It is assumed that 1969 is a typical year. Cruise ship passengers numbered 53,000 in 1965; they increased noticeably in the mid 1960s and remained at about 75,000 to 80,000 each year until 1972, when the number of cruise ship passengers increased again to 100,000. Nevertheless, since 1960 cruise ship passengers have constituted a diminishing proportion of all visitor arrivals.

Aviation statistics confirm that Barbados is receiving a large and growing number of package tourists. The statistics show the proportions of scheduled and non-scheduled passengers embarking on international flights:

Passengers	1971	1972	Jan-May 1973
Scheduled	274,418	301,840	143,126
Non-scheduled (% of total)	<u>19,910</u> (7.3)	<u>51,952</u> (14.7)	<u>25,732</u> (15.2)
Total	294,328	353,792	168,858

Table 2.19

BARBADOS - Annual Visitor Arrivals

	1960	1965	1968	1969	1970	1971	1972	1973
JANUARY			9,026	13,869		18,789		
FEBRUARY			11,731	10,790		21,230		
MARCH			11,240	18,130		16,361		
APRIL			10,404	11,759		17,070		
MAY			6,828	9,787		10,701		
JUNE			7,152	7,389		8,672		
JULY			9,786	10,418		17,639		
AUGUST			12,348	16,145		18,827		
SEPTEMBER			6,969	9,153		9,366		
OCTOBER			7,258	7,161		12,663		
NOVEMBER			6,229	11,180		17,367		
DECEMBER			16,726	11,849		20,390		
Total	35,535	68,418	115,697	137,630	156,800	189,075	210,430	
+ cruise ship passengers		<u>52,664</u>	<u>75,981</u>	<u>80,565</u>	<u>79,635</u>	<u>79,159</u>	<u>100,086</u>	
Grand Total		121,064	191,678	214,868	236,052	268,234	310,516	
Cruise ship passengers as % of grand total		43.5	39.6	37.5	33.7	29.5	32.2	

Table 2.20

BARRADOS - Tourist Arrivals by Country of Residence

	Numbers of visitors						% distribution of visitors							
	1960	1965	1968	1969	1970	1971	1972	1960	1965	1968	1969	1970	1971	
United States	9,716	19,811	41,287	53,860	59,500	68,487		27.3	29.0	35.7	39.1	38.0	36.2	
Canada	3,755	14,212	27,879	33,770	42,500	53,690		10.6	20.8	24.1	24.6	27.1	28.4	
United Kingdom	2,102	6,673	11,493	11,390	12,800	13,621		5.9	9.8	9.9	8.3	8.2	7.2	
Rest of Europe														
Central America														
South America	3,182	1,969	2,056	2,300	11,559	3,117		8.9	2.9	1.8	1.7	7.4	1.6	
Venezuela														
OTHER	1,521	3,852	6,846	7,580		13,323		4.3	5.6	5.9	5.5		7.1	
Other Caribbean countries														
TRINIDAD	6,359	9,265	9,853	11,190	31,500	13,525		17.9	13.5	8.5	8.1		7.2	
JAMAICA	546	918	1,107	1,450			1,944		1.5	1.3	1.0	1.1		1.0
LEEWARD + WINDWARD ISLAND	5,547	7,541	9,846	10,740			14,457		15.6	11.0	8.5	7.8		7.7
GUYANA	2,186	3,118	3,311	3,360			3,966		6.2	4.6	2.9	2.4		2.1
FRENCH WEST INDIES	528	977	1,853	1,820			2,731		1.5	1.4	1.6	1.3		1.4
DUTCH WEST INDIES	93	82	166	170			214		0.3	0.1	0.1	0.1		0.1
(SUB-TOTAL CARIBBEAN COUNTRIES)	(15,259)	(21,901)	(26,136)	(23,730)			(36,837)		(43.0)	(31.9)	(22.6)	(20.8)	(20.1)	19.5
Total	35,535	68,418	115,697	137,630	156,200	184,075		100.0	100.0	100.0	100.0		100.0	

Table 2.21

BARBADOS - Tourist Arrivals by Country of Residence and Month for 1971

	JAN	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL
United States	7,522	9,363	6,021	6,163	3,576	2,996	6,562	6,560	2,540	3,347	6,090	7,747	68,487
Canada	6,014	6,894	6,144	4,757	2,829	1,966	3,875	3,219	1,494	3,770	6,010	6,718	53,690
United Kingdom	1,603	1,173	857	947	812	581	1,267	1,119	817	1,172	1,260	2,013	13,621
Rest of Europe													
Central America													
South America													
Venezuela	201	91	104	326	143	203	465	656	390	177	138	223	3,117
Guyana	241	219	170	340	224	299	417	827	427	315	281	206	3,966
Other Caribbean countries													
Trinidad	832	721	683	1,489	963	706	1,678	2,466	1,053	1,163	903	868	13,525
Jamaica	174	128	136	233	108	129	201	250	159	129	114	183	1,944
Leeward & Windward Islands	1,019	1,424	1,296	1,381	927	898	1,469	1,680	1,165	1,123	968	1,107	14,457
French West Indies	64	96	43	381	145	91	487	821	251	120	140	92	2,731
Dutch West Indies	10	13	8	11	13	15	29	11	23	38	36	7	214
Other countries	1,109	1,108	899	1,042	961	788	1,189	1,218	1,047	1,309	1,427	1,226	13,323
Total	18,789	21,230	16,361	17,070	10,701	8,672	17,639	18,827	9,366	12,663	17,367	20,390	189,075

Table 2.22

BARBADOS - Average Length of Stay, Season and Type of Accommodation

		<u>Days - Average Length of Stay</u>				
		1968	1969	1970	1971	1972
Luxury Hotels	Feb	12	9	8	8	8
	July	6	8	7	6	6
	Sept	8	6	5	7	5
	Annual Average	7	7	-	7	7
'A' Class	Feb	7	6	7	6	7
	July	6	6	5	7	5
	Sept	5	5	6	6	6
	Annual Average	6	6	-	6	6
'B' Class	Feb	6	5	7	6	6
	July	7	7	4	6	5
	Sept	6	8	3	5	8
	Annual Average	6	7	-	5	6
Guest Houses	Feb	12	9	11	11	7
	July	8	8	10	9	4
	Sept	7	9	6	10	5
	Annual Average	8	9	-	10	6
All hotel accommo- dation	Annual Average	6.3	6.5	-	6.4	-

Source: Statistical Service - Bednights Survey

Table 2.23

BARBADOS - Average Length of Stay by Month and Type of Accommodation - 1971

Month	Luxury Hotels			'A' Class Hotels			'B' Class Hotels			Guest Houses			Total		
	No. of Bed-nights	New Registrations	Average length of stay	No. of Bed-nights	New Registrations	Average length of stay	No. of Bed-nights	New Registrations	Average length of stay	No. of Bed-nights	New Registrations	Average length of stay	No. of Bed-nights	New Registrations	Average length of stay
Jan	34.247	5.234	7	17.786	3.187	6	1.930	352	5	1.041	109	10	55.004	8.882	6.19
Feb	45.865	5.833	8	21.693	3.661	6	3.140	510	6	2.213	210	11	72.911	10.214	7.14
Mar	40.362	5.329	8	15.392	2.546	6	2.876	559	5	2.801	217	13	61.431	8.651	7.10
Apr	33.729	5.370	6	15.821	2.845	6	2.062	406	5	1.729	163	11	53.341	8.784	6.07
May	22.544	3.886	6	15.287	3.366	5	1.405	202	7	1.241	130	10	40.477	7.584	5.31
Jun	12.309	2.471	5	9.050	1.960	5	754	234	3	849	108	8	22.962	4.773	4.31
Jul	24.408	4.008	6	16.217	2.488	7	1.525	279	5	1.178	138	9	43.328	6.913	6.27
Aug	31.270	4.459	7	18.806	2.831	7	2.198	387	6	2.747	256	11	55.021	7.933	6.94
Sept	16.570	2.559	7	9.449	1.499	6	806	166	5	1.116	107	10	27.941	4.331	6.45
Oct	24.091	4.069	6	12.976	2.421	5	1.217	198	6	507	81	6	38.791	6.769	5.73
Nov	38.343	5.684	7	23.242	4.109	6	1.889	374	5	641	100	6	64.115	10.267	6.25
Dec	41.097	5.050	8	23.787	3.842	6	2.080	490	4	1.118	132	6	63.052	8.754	7.12
Total	364.835	53.952	7	199.506	34,755	6	21,882	4,157	5	17,181	3,801	10	600,408	9,103	6.07

Source: Statistical Service, Barbados

BERMUDA

Statistics

The Department of Tourism derives most of its information from analysis of E/D cards. These are computerized in Bermuda and are designed to give maximum information about visitor characteristics, place and length of stay, etc.

The Department of Tourism annually conducts three surveys of departing passengers at the international airport. The main objective of the survey is to identify potential sources of dissatisfaction. Survey questions seek information on behavioural patterns, attitudes towards Bermuda as a resort area, demographic characteristics and income/occupation of visitors.

Annual and Monthly Visitor Arrivals

In 1972, there were 340,000 stopover visitors to Bermuda (Table 2.24). This compares with 111,000 in 1960 and 267,000 in 1968. The fastest growth in arrivals occurred in the early 1960s, and there has been a noticeable levelling off since 1968 with average growth rates falling to 6%. Tourist arrivals have followed an even upward trend, however, and no year has been characterized by a decrease in numbers.

The monthly arrival pattern is different for Bermuda than for the other Caribbean Islands, probably because of climatic differences. The main season lasts from April to August, coinciding with spring and summer in the Northern Hemisphere. Quarterly figures show that 60% of visitors arrived in April-June and July-September 1968, implying marked seasonal fluctuations. In 1972, the proportion arriving in summer was even higher, at 60%.

Visitor Arrivals by Country of Origin

"Country of Origin" is defined as country of residence. Separate figures are shown for stopover visitors and for stopover-plus-cruise visitors (Table 2.25). The difference between the two, seems to imply that large proportions of cruise ship passengers in 1960 came from Europe and places other than North America but in 1970, U.S. residents constituted an overwhelming proportion of cruise passengers.

The pattern of stopover visitors by country of residence has remained stable since 1960 as it has in The Bahamas. Some 85% of visitors come from North America, principally from the U.S.A. and Europe provides 4%, so that only 1% originate in other regions.

U.S. residents visiting Bermuda come mainly from the East Coast (Table 2.26). Since 1965, 40% have originated in New York or New Jersey, while an additional 40% come from Massachusetts, Pennsylvania, Connecticut, Maryland and Virginia.

Average Length of Stay

The Department of Tourism has observed a trend towards shorter average length of stay among visitors to Bermuda. This is reflected in the statistics (Table 2.27), which indicate a fall from 8.1 nights in 1960 to 6.2 in 1965 and 5.4 in 1972. The trend probably results from the tendency for increasing numbers of persons to visit Bermuda en route between North or Central America and Europe. The Department of Tourism realises that it is essential to increase annual visitor arrivals substantially, or else to arrest the trend towards shorter stays, if the tourism industry is to continue to grow.

In general, average length of stay is longer in the tourist season than in the winter months.

Mode of Transport (Table 2.28)

Stopover visitors by air have exceeded 99% of all visitors each year since 1968. Clearly, Bermuda is too remote to attract many visitors arriving in small boats. Cruise ship passengers constituted from 19% to 24% of all visitors between 1965 and 1973. The greatest increase occurred in 1969, with some 90,000 cruise ship passenger arrivals, compared with 64,000 in the previous year.

Table 2.24

BERMUDA - Annual and Monthly Visitor Arrivals

	1960	1965	1968	1969	1970	1971	1972
January		4647	8118	8652	8132	8335	10513
February		10972	15856	14340	15689	16846	20288
March		17757	25559	26206	28151	26037	31655
April		20441	31325	31648	30652	36492	38476
May		21595	22602	29505	33220	35237	36021
June		17553	27159	29041	29823	28866	34011
July		22205	26998	29218	34117	33781	33302
August		21944	30831	33911	36455	36997	37027
September		13764	20796	20599	25289	27362	25071
October		14762	20721	23384	26840	32282	32223
November		12539	23830	20599	20613	21956	23703
December		9086	13647	13884	13795	15119	17492
Total	111,287	187,265	267,442	280,987	302,776	319,310	339,782
Cruise Total	<u>40,281</u>	<u>50,517</u>	<u>63,937</u>	<u>89,933</u>	<u>86,138</u>	<u>93,637</u>	<u>81,168</u>
TOTAL	151,568	237,782	331,379	370,920	388,914	412,947	420,950

Table 2.25

BERMUDA - Countries of Origin - Percent of Total

		% distribution of visitors						
		1960	1965	1968	1969 ^{1/}	1970	1971	1972
1. Visitors by air & ship, excl. cruise								
2. Includes cruise visitors								
United States		85.59	84.22	82.94	83.58	84.47	85.41	85.79
		82.51	87.10	85.76	87.05	87.23	87.90	88.01
Canada								
	1.	9.87	10.18	10.76	10.59	10.05	9.24	8.76
	2.	8.03	8.28	9.01	8.47	8.49	7.70	7.48
United Kingdom								
	1.	2.18	3.25	3.95	3.48	3.06	2.94	3.17
	2.	3.39	2.75	3.31	2.71	2.39	2.52	2.60
Rest of Europe								
	1.	0.55	0.79	0.80	0.90	0.82	0.86	0.89
	2.	1.23	0.63	0.66	0.68	0.63	0.67	0.78
REST OF WORLD								
	1.	1.81	1.56	1.55	1.45	1.60	1.55	1.39
	2.	4.84	1.24	1.26	1.09	1.26	1.21	1.13

^{1/} Transit-cruise passengers not included.

Table 2.26

BERMUDA - States of Residence, U.S.A.

		1960	1965	1968	1969	1970	1971	1972
	1. No of visitors 2. % of total U.S.A. visitors							
NEW YORK	1.	32,281	51,723	64,803	70,085	74,835	77,154	76,866
	2.	33.89	34.10	29.32	30.00	29.36	28.36	26.44
MASS.	1.	10,758	21,097	36,151	42,506	48,399	55,759	57,277
	2.	11.29	13.90	16.36	18.20	19.00	20.49	19.70
NEW JERSEY	1.	10,461	22,310	31,785	34,639	36,582	38,403	41,708
	2.	10.98	14.70	14.38	14.83	14.35	14.11	14.35
PENNSYLVANIA	1.	6,460	12,750	17,923	17,576	20,214	20,257	23,104
	2.	6.78	8.40	8.11	7.52	7.93	7.45	7.95
CONN.	1.	5,611	10,911	16,607	17,856	19,533	20,515	22,759
	2.	5.89	7.19	7.51	7.64	7.66	7.49	7.83
OHIO	1.	2,164	4,074	5,594	4,940	5,930	4,327	5,226
	2.	2.27	2.68	2.53	2.12	2.33	1.59	1.80
ILLINOIS	1.	1,586	2,950	3,839	4,096	4,106	4,277	4,672
	2.	1.67	1.94	1.74	1.75	1.61	1.57	1.61
MARYLAND	1.	1,529	3,667	5,835	6,169	7,222	7,740	8,699
	2.	1.61	2.42	2.64	2.64	2.83	2.84	2.99
MICHIGAN	1.	1,382	2,592	5,211	4,579	3,955	4,367	3,674
	2.	1.45	1.71	2.36	1.96	1.55	1.61	1.26
IRGINIA	1.	1,331	2,642	3,672	4,197	4,879	4,720	5,296
	2.	1.40	1.74	1.67	1.80	1.91	1.74	1.82
WEST	1.	21,687	17,030	29,580	26,963	29,259	34,697	41,459
	2.	22.77	11.22	13.38	11.54	11.47	12.75	14.26
Total U.S. visitors		95,250	151,746	221,000	233,606	254,914	272,096	290,740

Table 2.27

BERMUDA - Average Length of Stay by Month ^{1/}

	1960	1965	1968	1969	1970	1971	1972	1973
January		5.8	5.55	5.25	5.66	5.63	5.3	5.1
February		5.1	5.3	5.2	4.93	4.78	4.9	4.8
March		6.4	6.1	5.4	5.43	5.34	5.4	
April		6.7	6.6	6.6	6.15	6.13	5.4	
May		6.1	6.2	6.9	5.69	5.61	6.6	
June		6.69	6.0	5.8	6.03	6.10	5.6	
July		7.1	7.13	7.1	6.63	6.32	6.0	
August		6.8	6.8	6.5	6.2	6.20	5.8	
September		6.87	5.9	6.2	6.05	5.60	5.1	
October		5.3	5.6	5.56	5.66	5.06	5.1	
November		5.7	4.8	4.64	5.09	5.30	5.0	
December		5.7	5.6	5.51	5.35	5.40	5.2	
Total	8.1	6.19	6.0	5.89	5.74	5.6	5.5	

^{1/} Average length of stay expressed as "nights" spent in Bermuda.

Table 2.28

BERMUDA - Visitor Arrivals and Mode of Transport

	1960	1965	1968	1969	1970	1971	1972	1973
Air		180752	265378	279262	301604	318371	338574	
% of Subtotal (air & sea)		96.52	99.23	99.39	99.61	99.71	99.64	
% of grand total (air, sea & cruise)		76.01	80.01	75.29	77.55	77.10	80.43	
Sea		6513	2064	1725	1172	939	1208	
% of Subtotal (air & sea)		3.48	0.77	0.61	0.39	0.29	0.36	
% of Grand Total (air, sea & cruise)		2.74	0.62	0.46	0.30	0.23	0.29	
Subtotal	111287	187265	267442	280987	304576	319310	339782	
Cruise ship passengers	40281	50517	63937	89933	86138	93637	81168	
% of Total		21.25	19.29	24.25	22.15	22.67	19.28	
Total	151568	237782	331379	370920	388914	412947	420950	

BRITISH VIRGIN ISLANDS

Statistics

Annual visitor arrivals by mode of transport have been calculated from entry and departure cards since 1968 (Table 2.32). The format of the E/D card was changed at the end of 1972 to facilitate analysis and enable calculation of average length of stay.

Annual and Monthly Visitor Arrivals

Annual visitors to the British Virgin Islands numbered 44,800 in 1972. There are no statistics prior to 1968, when there were 22,783 visitors, but between then and 1972, visitor arrivals grew rapidly at the rate of 18.5% per annum. Figures for monthly tourist arrivals are sparse at present.

Visitor Arrivals by Country of Origin

Figures are available for December 1972 and February 1973 only (Table 2.29). February is the busiest month for tourists in the Caribbean and the British Virgin Islands figures show that visitor arrivals from the United States were much higher in February 1973 than in the preceding December. U.S. residents comprised 74% of all visitors in February and 69% in December. About one third of all visitors to the British Virgin Islands originated in the Eastern States of New York, New Jersey, Connecticut and Massachusetts. An additional 8-9% came from Pennsylvania, Maryland and Washington D.C. Caribbean residents, mainly from the U.S. Virgin Islands, comprise the second largest group of visitors to the British Virgin Islands. There were more Caribbean resident visitors in February than in December, but in proportional terms, they comprised 25% in December and 20% in February.

Visitors from Canada and the United Kingdom comprised only 4% of total visitor arrivals.

Average Length of Stay

Average length of stay has been calculated for long-stay visitors in December 1972 and February 1972 (Table 2.30) at 7.1 and 7.3 days respectively. Day visitors, who travel principally from the U.S. Virgin Islands, or possibly from Puerto Rico, comprise a significant percentage (21-22%) of the total, and reduce the average length of stay sharply to 5.7 and 5.9 days.

The figures for long-stay visitors suggest that U.K. visitors remain 12 or 13 days on average, Canadians 10 days, other Europeans 8 days, U.S. visitors 7.5 days and Puerto Ricans 3 days. This is similar to the pattern on other islands.

Monthly figures for October to February show that visitors to the British Virgin Islands stayed longer in December, January and February than in October and November (Table 2.32). This trend towards a longer stay during the peak season has also been observed elsewhere.

Mode of Transport

More than 50% of visitors to the British Virgin Islands arrived by sea in 1972 (Table 2.32). Although other Caribbean Islands have large numbers of sea visitors, few cruise ships visit these islands. The majority of sea arrivals come on private yachts or boats and on ferries from the U.S. Virgin Islands or Puerto Rico. The configuration of this island group and its proximity to the U.S. Virgin Islands make it very attractive for fishing, sailing and other boating activities.

Table 2.29

BRITISH VIRGIN ISLANDS - Tourist Arrivals by Place of Residence - 1972/73

	DEC 1972		FEB 1973		Percentage Distribution of Tourist Arrivals	
	Total Tourist Arrivals	Day Visitors	Total Tourist Arrivals	Day Visitors	DEC 1972	FEB 1973
California	242	40	359	68	3.0	2.3
Michigan/Illinois/Ohio	545	110	1,271	245	6.8	8.1
N. Jersey/N. York/Connecticut Mass.	2,626	544	5,686	1,228	53.0	36.1
Pennsylvania/Maryland/ Washington	610	128	1,455	289	7.7	9.2
Other states	<u>1,492</u>	<u>307</u>	<u>2,887</u>	<u>589</u>	<u>18.7</u>	<u>18.3</u>
TOTAL USA	5,515	1,129	11,658	2,419	69.2	74.0
Eastern Caribbean	480	54	754	94	(6.0	4.8)
U.S. Virgin Islands	1,072	385	1,764	764	24.8 (13.5	11.2) 19.9
Puerto Rico	425	54	622	114	(5.3	3.9)
Canada	176	11	380	24	2.2	2.4
U.K.	147	8	287	23	1.8	1.8
Other Americas (South and Central America together)	20	2	27	7	0.3	0.2
Europe	85	4	188	10	1.1	1.2
Other	<u>49</u>	<u>4</u>	<u>78</u>	<u>6</u>	<u>0.6</u>	<u>0.5</u>
TOTAL	7,969	1,651	15,758	3,461	100.0	100.0

Source: 1972/73 Analysis of E/D Cards

Table 2.30

BRITISH VIRGIN ISLANDS - Average Length of Stay by Area of Residence 1972/73

	AVERAGE LENGTH OF STAY (excluding day visitors)	
	DEC 1972	FEB 1973
California	7.4	7.1
Michigan/Illinois/Ohio	7.7	7.9
N. Jersey/N. York/Conn./ Mass.	7.5	7.9
Pennsylvania/Maryland/Washington, D.C.	7.4	7.8
Other States	7.1	6.8
Total U. S.A.	7.4	7.6
Eastern Caribbean	9.7	7.7
U.S. Virgin Islands	3.5	3.2
Puerto Rico	3.1	3.0
Canada	9.7	10.0
United Kingdom	11.8	12.8
Other Americas	3.6	5.1
Other Europe	8.2	8.3
Other	7.3	6.4
TOTAL	7.1	7.3

Table 2.31 †

BRITISH VIRGIN ISLANDS - Average Length of Stay 1972/73 - Total

	1972	1973
January		7.48
February		7.55
March		
April		
May		
June		
July		
August		
September		
October	5.64	
November	6.26	
December	8.51	

Table 2.32

BRITISH VIRGIN ISLANDS - Visitor Arrivals and Mode of Transport

	1968	1969	1970	1971	1972
Air	11,814	14,787	16,661	19,000	22,000
% of total	51.8	50.1	49.6	49.2	49.1
Sea	10,979	14,726	16,928	19,600	22,800
% of total	48.2	49.9	50.4	50.8	50.9
Total	22,793	29,513	33,589	38,600	44,800

CAYMAN ISLANDS

Statistics

Visitor arrival statistics are compiled by the Tourist Board from analysis of E/D cards.

Annual and Monthly Tourist Arrivals

Annual statistics reveal that the Cayman Islands have expanded their tourist trade, albeit from a small base, quite significantly since 1965. In 1972, there were 30,646 visitors to the Cayman Islands (Table 2.33); annual average growth rates for the period 1965-72 were extremely high, around 24.5%. Since 1968 there has been a slackening in growth to an average of 21%.

Tourist arrivals are heavy in the months December to March. The quarterly statistics for the years 1965-1971 imply that tourism is seasonal, with between 29% and 36% of visitors arriving in the first quarter. Figures for 1972 indicate that the seasonal imbalance is declining gradually, but the Cayman Islands have a relatively weaker summer season than other Caribbean resorts.

Visitor Arrivals by Country of Origin

Usually more than three quarters of visitors to the Cayman Islands reside in the U.S.A. (Table 2.34). Some 10% originate in other Caribbean countries; possibly a large proportion of these are business visitors to the financial centre on Grand Cayman. Canadians represent 6-7% of the total and British visitors 2%. Visitors from other countries are very few.

U.S. visitors originate in several States (Table 2.35). Florida provides the greatest number (14.3% of total visitors in 1968), followed by New York (8.3%). Interestingly, Texas and Missouri are included in the ten most important generating States. (The Cayman Islands may be receiving more visitors from southern U.S. States than are other Caribbean Islands.) Recently, the Tourist Board has been concentrating efforts on the promotion of visitor from Florida and believes the policy is beginning to be effective.

Unfortunately there are no statistics relating to purpose of visit of travellers. The impression is that there are substantial numbers of business visitors. The management of one large hotel on Grand Cayman estimates that 50% of summer visitors and 20% of winter visitors are business visitors.

Average Length of Stay

Average length of stay is not measured. The Tourist Board has an estimated figure for 1969 of 7.63 days (source unknown) and in April 1972 consultants estimated 6.1 days. The management of a Grand Cayman hotel estimates that winter visitors stay seven days on average and summer visitors, two to three days.

Mode of Transport

No information is available.

Table 2.33

CAYMAN ISLANDS - Annual and Monthly Visitor Arrivals

	1960	1965	1968	1969	1970	1971	1972	1973
January		780	1206	1439	2065	2061	2192	3601
February		851	1934	2097	2553	2813	3085	4250
March		671	1903	2525	3450	2627	3475	
April		642	1468	1532	1508	1517	2442	
May		342	837	1303	1739	1522	1993	
June		368	883	1195	1576	1634	2218	
July		457	1086	1428	1876	2081	2507	
August		459	1221	1669	1905	1939	2899	
September		286	541	867	1039	1150	1582	
October		287	576	1074	1337	1273	2078	
November		538	1052	1822	1747	1976	2803	
December		936	1453	2459	2096	2757	3372	
Total		6612	14160	19410	22891	24354	30646	

Table 2.34

CAYMAN ISLANDS - Visitor Arrivals by Area of Residence

	Numbers of visitors				% distribution of visitors			
	1968	1969	1970	1971	'68	'69	'70	'71
United States	9605	14948	18719	19117	74.6	77.0	80.7	78.5
Canada	748	1320	1314	1785	5.8	6.8	5.7	7.3
United Kingdom	243	403	470	544	1.9	2.1	2.0	2.2
Rest of Europe								
Central America	97	67	134	155	0.8	0.3	0.6	0.6
South America	51	28	29	23	0.4	0.1	0.1	0.1
Other Caribbean countries ^{1/}	1943	2071	1892	2453	15.1	10.7	8.2	10.1
ALL OTHERS	189	574	631	277	1.5	3.0	2.7	1.1
Total	12876	19411	231889	24356	100.0	100.0	100.0	100.0

^{1/} Including Bermuda, Jamaica, Puerto Rico, etc.

Table 2.35

CAYMAN ISLANDS - State of Origin of U.S. Visitors

	1968	% of all visitors ^{1/}
Florida	1836	14.3
New York	1066	8.3
Illinois	854	6.6
Ohio	543	4.2
Michigan	492	3.8
Pennsylvania	461	3.6
New Jersey	362	2.8
Massachusetts	300	2.3
Texas	273	2.1
Missouri	260	2.0

^{1/} See Table 2.34

DOMINICA

Statistics

The Ministry of Planning and Development and the Tourist Board supplied figures relating to visitor arrivals. These were derived from an analysis of E/D cards.

Annual and Monthly Visitor Arrivals

Dominica receives few visitors relative to other islands. In 1972, Dominica received 15,300 visitors, excluding cruise ship passengers. In spite of the small base, growth rates have been modest in the last seven years (Table 2.36).

Monthly visitor arrival statistics are available only for 1972 and only for air arrivals (Table 2.37). August and December are the peak months for visitor arrivals by air. Visitor arrivals in February and March are above average, but there is no distinct winter tourist season. Comparison of monthly visitor arrival statistics with monthly bednight figures from hotels and guest houses suggests that visitors in the summer months and in December generally stay in private houses or rented villas.

Total Visitor Arrivals by Country of Origin

The majority of visitors to Dominica are residents of other Caribbean countries (Table 2.38). If the proportion of North American visitors is an indicator of the extent to which tourism has been developed in any one island, then tourism development has barely begun in Dominica. In 1972, as in 1965, less than 25% of visitors were residents of the USA and Canada. U.S. visitors are said to come mainly from New York or New Jersey. Hoteliers comment that residents from the French West Indies visit Dominica in the summer.

Average Length of Stay

There are no statistics for average length of stay. The format of the E/D card used in Dominica and many other islands does not facilitate collection of data on average length of stay since entry and departure cards need to be matched to make this calculation, which is too laborious a process for immigration authorities.

The Tourist Board and two hotels estimate an average stay of 3-4 days; one hotel management reports 7-10 days as their average; another hotel receives a mixture of businessmen, who stay one or two days and tourists who stay about one week.

Mode of Transport

The proportion of stopover visitors arriving by air has increased from 85% in 1965 to 96% in 1972 (Table 2.38). Sea visitors may include passengers on light craft travelling down the East Caribbean from Antigua and the French West Indies as well as passengers aboard the banana boats.

There are no statistics describing the number of cruise ship visitors to Dominica since 1968 when there were 3,300 visitors.

Table 2.36

DOMINICA - Visitor Arrivals by Country of Origin

	Numbers of visitors						% distribution of visitors							
	1960	1965	1968	1969	1970	1971	1972	'60	'65	'68	'69	'70	'71	'72
United States ^{1/}		970	2,272	2,788	3,586	3,458	2,719		18.1	22.8				18.5
Canada		212	630	725	993	807	776		4.0	6.3				5.3
United Kingdom		465	690	933	1,376	1,247	1,547		8.7	6.9				10.5
Rest of Europe				417			948		-	-				6.4
Central America														
South America		77	157				116		1.4	1.6				0.8
Other Caribbean countries		3,292	5,910				8,631		61.5	59.2				- 235 -
Other countries		339	318						6.3	3.2				58.5
Total		5,355	9,977				14,737		100.0	100.0				100.0

^{1/} 1965 and 1968 data - air and sea excluding cruise-ship passengers; 1972: air arrivals only.

Table 2.37

DOMINICA - Monthly Air Arrivals and Hotel and Guest House Bednights, 1972

	<u>BY AIR</u>	<u>BY SEA</u>	<u>TOTAL</u>	<u>Hotels & Guest Houses Total bednights</u>
January	1,029			2,640
February	1,445			3,444
March	1,182			2,340
April	927			2,152
May	963			1,449
June	1,043			1,459
July	1,451			2,204
August	1,910			2,557
September	890			1,300
October	962			1,363
November	1,246			1,715
December	1,669			1,362
Total	14,737	557	15,294	24,005

Table 2.38

DOMINICA - Visitor Arrivals and Mode of Transport

	1960	1965	1968	1969	1970	1971	1972
Air (% of Subtotal)		4,543 84.8	9,387 94.1	11,300	13,316	14,010 95.3	14,737 96.4
Sea (% of Subtotal)		812 15.2	590 5.9			698 4.7	557 3.6
Subtotal (Air and sea)		5,355	9,977			14,708	15,294
Cruise ship passengers		1,542	3,287				
% of grand total		22.4	24.8				
Grand Total (Air, Sea and Cruise)		6,897	13,264				

Source: Tourist Board

DOMINICAN REPUBLIC

Statistics

All statistical information for the Dominican Republic is summarized in Table 2.40 which shows total annual visitor arrivals, total bednights, average length of stay, and country of residence. A benchmark date of 1966 rather than 1965, is selected, which was not a typical tourist year (Tables 2.39 and 2.40).

Annual and Monthly Visitor Arrivals

The Dominican Republic received 135,000 visitors in 1972 (Table 2.39). In 1960 there were only 19,000 visitors and the annual average growth rate for the twelve-year period was 17.5%. Arrivals increased slowly between 1960 and 1966, but in the middle 1960s growth accelerated, until 1969 when there were 74,000 visitors. Slower growth of the U.S. economy seems the most likely explanation for the decline in 1969/70. In the two years since 1970, however, the number of visitors has almost doubled, and the annual average growth rate since 1968 (22.5%) has been very high. No monthly arrival figures are avail-

Total Visitor Arrivals by Country of Origin

In 1960, nearly 90% of visitors originated in North America, with none from neighbouring Caribbean or Central American countries (Table 2.39).

By 1966 North Americans comprised only 75% of total visitors and Puerto Rico (which provided 19%) was becoming a significant tourist supplier. In 1968, North Americans comprised only one third of total visitors and Puerto Ricans almost half. In the succeeding years, North Americans have increased their share to 48% in 1972 and Puerto Ricans constitute 37% of the total.

Average Length of Stay

Average length of stay has been increasing progressively, from 2.5 days in 1960 to 3 days in 1966 and 5.8 in 1972.

Table 2.39

DOMINICAN REPUBLIC - Visitor Arrivals and Country of Origin

	% Distribution of visitors						
	1960	1966	1968	1969	1970	1971	1972
United States	89.3	75.1	33.0	30.4	47.5	49.0	48.4
Canada							
United Kingdom							
Rest of Europe							
Central America							
South America							
Other Caribbean countries							
Puerto Rico	0.1	18.7	47.5	46.3	39.4	35.1	37.1
Venezuela	0.0	2.4	1.9	3.1	1.7	1.5	2.4
Cuba	0.2	-	2.2	1.9	1.2	0.7	0.7
Haiti	0.1	0.2	0.4	0.3	0.4	0.3	0.3
Other countries	10.3	3.6	15.0	18.0	9.8	13.4	11.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 2.40

DOMINICAN REPUBLIC - Average Length of Stay by Country of Residence

	1960	1966	1968	1969	1970	1971	1972
COUNTRY of RESIDENCE							
North America							
Number of Arrivals	17,285	21,030	19,863	22,604	32,094	52,119	65,306
Avg. length of stay	2.5	3	4	4	4.4	4.8	5.8
Bed Nights	43,213	63,090	79,452	90,416	141,214	250,171	378,775
Puerto Rico							
Number of Arrivals	6	5,232	28,649	34,349	26,638	37,366	50,050
Avg. length of stay	2.7	3	4	4	4.4	4.8	5.8
Bed Nights	15	15,696	114,596	137,396	117,207	179,357	290,290
Venezuela							
Number of Arrivals	3	682	1,149	2,275	1,132	1,602	3,311
Avg. length of stay	2.5	3	4	4	4.4	4.8	5.8
Bed Nights	8	2,046	4,596	9,100	4,981	7,690	19,204
Cuba							
Number of Arrivals	47	-	1,303	1,436	816	751	929
Avg. length	2.5	-	4	4	4.4	4.8	5.8
Bed Nights	118	-	5,212	5,744	3,590	3,605	5,388
Haiti							
Number of Arrivals	23	46	225	256	269	347	429
Avg. length of stay	2.5	3	4	4	4.4	4.8	5.8
Bed Nights	58	138	900	1,024	1,184	1,666	2,488
Others							
Number of Arrivals	1,997	1,008	9,041	13,343	6,617	14,283	15,011
Avg. length of stay	2.5	3	4	4	4.4	4.8	5.8
Bed Nights	4,993	3,024	36,164	53,372	29,115	68,558	87,064
TOTAL	19,361	27,998	60,230	74,263	67,566	106,468	135,036

NOTE: 1965 Benchmark Date adjusted to 1966

GRENADA

Statistics

The Grenada Tourist Board provided statistics compiled from entry and departure cards - the standard E/D card is used. In Grenada as in St. Lucia, there is some ambiguity as to the definition of a "visitor". Expatriates living in Grenada for more than one year, may apply for permanent residence status, (although they are not obliged to do so) and may live and work in the territory as long as they hold a work permit. Permanent residents' passports are marked with a stamp, and travelers without this stamp are classified as visitors. Hence immigrants and expatriates residing for a short period in Grenada are categorized as "visitors," whereas they would be considered "residents" elsewhere.

Statistics showing country of origin are based on nationality, rather than country of normal residence. For the vast majority of visitors this is probably not significant.

Annual and Monthly Visitor Arrivals

The 38,000 stopover visitors in 1972, indicate that Grenada has a small but identifiable tourism industry. Growth in the period 1965-72 was steady, with an average annual increase of 15.5%. Despite a 3% growth in visitor arrivals in 1970, growth rates averaged 13% between 1968 and 1972.

Monthly visitor arrival figures, available for 1972 only, indicate a marked winter tourist season, peaking in February and March, with a secondary season in July-August and definite troughs in June and October.

Total Visitor Arrivals and Country of Origin

Nearly half the visitors to Grenada originate in North America (Table 2.41). Since 1968, the U.S. share of the market has declined slightly from 42% to 35%, whereas Canadians have increased from 12% to 14%. U.K. visitors are proportionately more significant in Grenada than in most Caribbean Islands, but their share has declined from 19% in 1965 to 15.5% in 1968 and 11.5% in 1972. Visitors from other Caribbean Islands maintain a 30% share, while the proportion from other countries is growing annually.

Average Length of Stay

Statistics for 1972 (Table 2.42) indicate long stays of 12 days. Visitors during the winter season tend to average ten or eleven days, whereas summer visitors average 13 days and those arriving in the off-season, about 15 days. A possible explanation for these figures is that many people rent villas or stay in private homes rather than in hotels. Grenada seems to attract long-distance travellers (from U.K.), as well as wealthy and retired persons who are not constrained by financial and time considerations.

Mode of Transport

Cruise ship passengers have comprised more than 50% of all visitors since 1965 (Table 2.43). In 1972 they increased substantially to 94,000 representing 71% of all visitor arrivals.

Sea arrivals have not increased numerically since 1969. About 3,000 are recorded each year, probably comprising passengers from small yachts and motorboats travelling from St. Vincent and the Grenadines or from islands farther north in the East Caribbean chain.

Table P.01

GRENADA - Visitor Arrivals by Country of Origin

	1960	Numbers of visitors					1972
		1965	1968	1969	1970	1971	
United States		4240	9600	10862	11214	12441	13157
% of total		30.6	41.5	36.7	36.9	34.9	34.7
Canada		1371	2859	3419	3755	4662	5431
% of total		9.9	12.3	11.5	12.3	13.0	14.3
United Kingdom		2607	3610	4355	4757	4875	4419
% of total		18.8	15.6	14.7	15.6	13.7	11.7
Venezuela		229	287	374	330	558	435
% of total		1.7	1.2	1.3	1.1	1.6	1.1
West Indies		4781	5229	9475	8898	10817	11216
% of total		34.5	22.6	32.0	29.2	30.4	29.6
All Others		622	1579	1142	1478	2273	3275
% of total		4.5	6.8	3.9	4.9	6.4	8.6
Other countries							
TOTAL		13850	23164	29627	30432	35626	37933

Source: Tourist Board

Table 2.42

GRENADA - Average Length of Stay by Month, 1972

	VISITORS ^{1/}		VISITOR DAYS	AVERAGE LENGTH OF STAY (days)
January	3344		40301	12.1
February	4678		48303	10.3
March	4471		42901	9.6
April	3077		34287	11.1
May	2503		28710	11.5
June	1984		23804	12.0
July	3315		42648	12.9
August	3929		51415	13.1
September	2058		31441	15.3
October	1941		26714	13.8
November	3003		31846	10.6
December	3630		47621	13.1
Total	37933		449991	11.9
		<u>1973:</u>		
January	3086		41868	13.6
February	4184		36736	8.8
March	4012		37498	9.4

^{1/} Estimates exclude cruise passengers.

Table 2.43

GRENADA - Visitor Arrivals and Mode of Transport

	1960	1965	1968	1969	1970	1971	1972
Air		12108	20695	26669	27429	32555	35081
% of stop-over visitors		87.4	89.3	90.0	90.1	91.4	92.5
Sea		1742	2469	2958	3007	3071	2852
% of stop-over visitors		12.6	10.7	10.0	9.9	8.6	7.5
Stop-over visitors		13850	23164	29627	30436	35626	37933
Cruise ship passengers		15990	26500	39118	41261	48652	94060
% of total		53.6	53.4	56.9	57.5	57.7	71.3
Total		29840	49664	68745	71697	84278	131993

HAITI

Statistics

The main statistical source was the OAS Report "Developpement du Tourisme en Haiti".

Annual and Monthly Visitor Arrivals

Data are available for 1968-72 only, and indicate that visitor arrivals have increased rapidly, by 31% per annum on average. Arrivals in 1972 were 50% higher than in 1971. Haiti has been even more successful in increasing tourism than its neighbour, the Dominican Republic, which achieved growth rates averaging 22.5% between 1968 and 1972.

Monthly visitor arrival statistics indicate that Haiti enjoys a relatively prolonged winter season from December, until the end of April. However, summer travel is growing as indicated by the increase in the share of annual visitors during the third quarter, from 25.4% in 1968 to 26.4% in 1971.

Monthly data for all visitors (including cruise ship passengers) display greater fluctuations than those for stopover visitors alone. Cruise ship arrivals seem to be concentrated in the period December to March.

About 70% of visitors to Haiti stay in hotels and 30% go to private homes (Table 2.51).

Visitor Arrivals by Country of Origin

Country of visitor origin is indicated in the statistics (Table 2.46). Approximately two thirds of arrivals between 1968 and 1972 have been residents of the U.S.A. Canadian visitors increased from 9% in 1968 to 10.6% in 1972. Europeans, who undoubtedly include many Frenchmen, form a substantial and growing proportion of the total (14.6% in 1972); Central American visitors are also growing in significance (8.4% in 1972). Visitors from the U.S.A. are mainly East Coast residents (approximately 60%) and from Puerto Rico (13%).

Monthly statistics suggest that visitors from the U.S.A., Canada and Europe (Tables 2.47-2.49) visit Haiti at different times of the year. U.S. residents seem to travel to Haiti in large numbers in July and August whereas Canadians prefer the winter months; April and August are the popular months for European visitors.

Average Length of Stay

Average length of stay is shown separately for hotel guests and persons staying in private homes (Table 2.52) and confirm impressions gained elsewhere that visitors to hotels stay for shorter periods than those in private homes. Average length of stay of hotel guests increased from 5.6

days in 1968 to 6.1 days in 1970. Overall, average length of stay increased from 8 days in 1968 to 8.9 days in 1970. This fairly long stay is similar to that for Jamaica and other large Caribbean territories that offer tourists sufficient and varied attractions and facilities for a complete holiday.

Average length of stay in hotels declines in the off-season months, September to November - a characteristic observed in other islands.

Transport Mode

Statistics differentiate between air and cruise ship passengers (Table 2.50). Cruise ship visitors constituted more than half the arrivals in 1968 and 1972, but visitors by air comprised more than 50% of the total during the intervening years, 1969-1971.

Table 2.44

HAITI - Annual and Monthly Visitor Arrivals ^{1/}

	1960	1965	1968	1969	1970	1971	1972	1973
January			6224	6402	9426	9660	14712	9888
February			8765	8175	6336	10879	17943	7502
March			6317	3652	6588	9310	17777	5689
April			4621	5052	4172	5603	11484	4201
May			2458	3651	2953	4982	9639	5881
June			2920	2068	2900	5220	11324	
July			3004	3958	4871	7746	15026	
August			3577	3396	5273	9519	14601	
September			2402	2115	3670	5024	6891	
October			1957	2961	2883	4346	10236	
November			3137	3787	5122	6731	11066	
December			5454	7034	8210	8412	19255	
Total			50836	52251	62404	87438	159954	

^{1/} Includes cruise ship visitors.

Source: Ten Year Development Plan by OAS

Table 2.45

HATTI - Annual and Monthly Visitor Arrivals ^{1/}

	1960	1965	1968	1969	1970	1971	1972	1973
January			1990	2539	2891	3799	5206	5421
February			2596	2897	3758	4740	6351	6813
March			1900	2487	3230	3728	6253	5196
April			2367	2469	1933	3729	5290	5421
May			1520	1965	1636	2368	4469	4635
June			1428	1576	2354	2860	5226	
July			1961	2573	3317	4710	6749	
August			2135	2949	3487	3900	5871	
September			1305	1540	2182	3257	3723	
October			1510	1893	2158	3055	4386	
November			1951	2206	2856	3759	4801	
December			2388	3217	3889	5028	9300	
Total			23051	28311	33691	44933	67625	

^{1/} Excluding cruise ship passengers.

Table 2.46

HAITI - Air Arrivals by Country of Origin

	Numbers of visitors						% distribution of visitors							
	1960	1965	1968	1969	1970	1971	1972	'60	'65	'68	'69	'70	'71	'72
United States			15172	19064	22534	29029	42703			65.8	67.4	66.9	64.6	63.1
Canada			2067	2613	3542	5266	7159			9.0	9.2	10.5	11.7	10.6
Mexico			105	110	143	150	275			0.5	0.4	0.4	0.3	0.4
Rest of Europe			3195	3917	4734	6588	9892			13.9	13.8	14.1	14.7	14.6
Central America			1851	1898	1903	2700	5647			8.0	6.7	5.7	6.0	8.4
South America			329	421	484	750	1060			1.4	1.5	1.4	1.7	1.6
Elsewhere			332	288	351	450	889			1.4	1.0	1.0	1.0	1.3
TOTAL air arrivals			23051	38311	23691	44933	67625			100	100	100	100	100
STATE OR AREA OF RESIDENCE IN USA: ^{1/}														
					12238	8495						54.3	44.5	
					1274	1400						5.7	7.3	
					1553	1587						6.9	8.3	
					2776	2575						12.3	13.5	
					468	439						2.1	2.3	
					645	602						2.8	3.2	
					3173	2894						14.1	15.2	
					397	1088						1.8	5.7	
Total U.S. ^{2/}					22534	19080						100.0	100.0	

^{1/} Air passengers only, cruise passengers excluded.^{2/} Discrepancy in figures for USA visitors 1971 - not explained.

Table 2.47

HAITI - Annual and Monthly Visitor Arrivals by Air from the U.S.A.

	1968	1969	1970	1971	1972
January	1260	1842	1843	2332	2923
February	1809	1898	2678	3068	3658
March	1274	1578	2219	2308	3486
April	1302	1524	1339	2260	3399
May	998	1298	1083	1616	3113
June	1059	1103	1666	1951	3560
July	1325	1793	2171	3044	4573
August	1571	2157	2433	2602	3967
September	785	838	1499	1808	2296
October	1030	1319	1380	1940	2939
November	1233	1525	1984	2460	3189
December	1526	2185	2239	3066	5600
Total	15172	19060	22534	28458	42703

Table 2.4F

HAWAII-- Annual and Monthly Visitor Arrivals by Air from Canada

	1968	1969	1970	1971	1972
January	202	329	537	753	859
February	264	493	506	859	1237
March	181	258	354	607	993
April	335	247	144	384	419
May	106	119	90	135	192
June	70	108	110	231	318
July	198	205	433	517	643
August	70	141	183	243	319
September	108	107	150	336	429
October	84	79	112	228	141
November	157	124	205	208	238
December	292	403	718	765	1371
Total	2067	2613	3542	5266	7159

NOTE: Cruise passengers excluded.

Table 2.49

HAITI - Annual and Monthly Visitor Arrivals by Air from Europe

	1968	1969	1970	1971	1972
January	228	220	320	436	800
February	233	284	349	462	790
March	258	379	429	460	968
April	363	425	259	743	741
May	205	348	323	350	653
June	187	244	397	410	640
July	271	368	441	691	855
August	331	388	526	614	940
September	264	257	313	516	568
October	220	286	361	547	636
November	283	261	406	638	771
December	352	457	610	721	1530
Total	3195	3917	4734	6588	9892

NOTE: Cruise passengers excluded.

Table 2.50

HAITI - Visitor Arrivals and Mode of Transport

	1968	1969	1970	1971	1972
Air	23051	28311	33691	44933	67625
% of stop-over visitors	45.3	54.2	54.1	51.4	42.3
Cruise ship passengers	27785	23940	28613	42505	92329
% of grand total	54.7	45.8	45.9	48.6	57.7
Grand total	50836	52251	62304	87438	159954
%	100.0	100.0	100.0	100.0	100.0

Table 2.51

HAWTI - Total Bednights in Hotels and Private Residences by Month

	1968		1969		1970		1971		1968	1969	1970	1971
	Hotels	Private Houses	Hotels	Private Houses	Hotels	Private Houses	Hotels	Private Houses	Day	Visitors		
January	9388	9761	10410	8088	12786	10184	18252	17560	22	146	54	137
February	10741	8664	13264	10932	16526	11493	21819	17182	36	107	182	83
March	7690	5955	8709	8217	13585	8622	16115	13627	48	48	59	90
April	9485	3117	9319	6040	7918	6502	14153	15198	9	91	55	76
May	6417	5041	6544	5996	6339	7054	9545	9425	27	192	59	71
June	6209	11904	6775	10339	9310	16361	15744	19289	47	41	34	67
July	7043	11242	10412	14712	11725	25531	17755	35062	17	86	70	92
August	6704	9007	10534	10311	13947	18364	16493	26003	52	77	67	101
September	4625	7627	6018	9685	7458	13479			30	26	100	
October	5507	5198	7084	5662	8178	11191			16	35	61	
November	6279	5416	8449	6447	11091	8802			44	25	95	
December	8122	11573	14822	13882	17296	20888			-	151	94	
TOTAL	88210	94505	112340	110311	136159	158491			348	1025	930	

Source: Bednight figures published in Development Plan report.

Table 2.52

ALTI - Average Length of Stay (nights)

	1968		1969		1970		1971	
	Hotels	Private Houses	Hotels	Private Houses	Hotels	Private Houses	Hotels	Private Houses
January	6.9	16.0	6.0	12.2	6.1	13.7	6.8	15.5
February	5.9	11.6	6.9	12.8	6.0	13.8	6.3	12.9
March	5.7	11.7	5.0	12.1	5.8	10.6	5.8	13.1
April	5.4	5.1	5.2	10.4	5.7	13.2	5.4	12.6
May	5.8	13.1	5.4	10.7	6.2	12.8	5.3	13.5
June	7.3	22.4	7.3	17.1	6.6	17.9	8.8	17.2
July	5.8	15.4	6.5	16.7	6.3	18.4	6.0	19.3
August	4.6	14.1	5.0	13.4	6.3	15.1	5.9	22.4
September	5.5	15.4	5.7	21.5	5.4	19.2		
October	4.9	15.5	4.9	13.4	5.9	16.0		
November	4.4	11.3	4.9	13.7	5.4	12.5		
December	6.0	13.6	7.3	13.5	7.4	14.3		
TOTAL	5.6	13.7	5.8	12.7	6.1	14.7		
		7.9		7.9		8.8		

JAMAICA

Statistics

Statistics are taken from arrival reports of the Jamaica Tourist Board. Entry and departure cards are the main source of data. Unlike the Bahamas and Bermuda, Jamaica does not seem to use computers to analyze its E/D cards and retains the old format which is not geared to providing tourist statistics.

Annual and Monthly Visitor Arrivals

Stopover visitors to Jamaica exceeded 400,000 in 1972 (Table 2.53). Tourism has grown substantially since 1960, when there were 80,000 stopover visitors to the island. After the redistribution of demand caused by the closure of Cuba to U.S. tourists, Jamaica's tourist industry stagnated until about 1964, but since then visitor arrivals have increased annually. The slow growth in 1969 was probably caused by slower economic growth in the U.S.A., which altered trends throughout the Caribbean. However annual rates of growth from 1968 to 1972 averaged 12%.

Monthly statistics show distinct seasonal variations, with the peak season from January to March, and a secondary one in July/August. As may be seen in the arrival statistics, fewer visitors come to Jamaica in September, October and November than in other months. Comparison of 1968 and 1971 quarterly distributions shows that seasonal imbalance has not been reduced during this period.

Visitor Arrivals by Country of Origin

The country of visitor origin (Table 2.56) has not changed radically over time. U.S. visitors have increased proportionately from 77% in 1965 to 81% in 1971; Canadian and U.K. residents have declined slightly from 11% to 8% and from 4% to 3% respectively. While many of the Caribbean islands have experienced a proportional increase in Canadian visitors in recent years, Jamaica has suffered a decline. Other Caribbean visitors generally comprise an unusually small 2.5% of all visitors, which reflects the relative distance of Jamaica from the rest of the Caribbean, as well as the large volume of North Americans travelling there.

Approximately 40% of U.S. visitors reside in New York and New Jersey (Table 2.55). Florida provides a substantial proportion of visitors (8% of all U.S. visitors), while Illinois and Pennsylvania account for about 10% each.

Average Length of Stay

Average length of stay is expressed in terms of nights spent in Jamaica and is calculated for all stopover visitors. The average length of stay was about nine nights in 1965 and eight nights in 1971 (Table 2.57), reflecting the declining trend throughout the Caribbean.

Monthly figures (Table 2.61) show that visitors in the first quarter generally stay longer than the annual average. Winter tourists in Barbados, Bermuda and other islands are observed to do the same.

Visitors in the slack months (May, June, October and November) generally stay for a period shorter than the annual average. Winter tourists are generally more affluent than summer and off-season visitors, and may also have more leisure time. The number of business visitors is fairly evenly distributed throughout the year; typically, they stay few days.

Transport Mode

Almost all stopover visitors to Jamaica arrive by air (Table 2.59). Nearly two thirds arrive at Sangster International Airport at Montego Bay, and one third at the Norman Manley airport, Kingston. Feeder plane and car services transfer visitors to resort areas at Ocho Rios and Port Antonio. Cruise ship visitors have declined from the peak of 97,000 in 1969 (Table 2.60). Cruises were concentrated in the winter months of each year until 1971, increasing pressure on tourist facilities and services. Cruise passengers were more evenly distributed during 1971 and 1972.

Table 2.53

JAMAICA - Annual and Monthly Visitor^{1/} Arrivals

	1960	1965	1968	1969	1970	1971	1972	1973
January			23,205	27,312	31,352	33,541	43,390	
February			25,260	26,673	30,570	37,042	38,472	
March			27,401	30,577	33,415	35,367	39,079	
April			23,143	26,667	26,823	33,315	42,406	
May			19,169	18,309	20,580	28,058	27,829	
June			16,839	17,652	20,503	21,453	24,183	
July			23,376	22,852	24,923	34,026	35,908	
August			27,187	29,126	33,202	38,847	43,884	
September			15,662	15,558	20,000	22,462	23,229	
October			13,136	17,144	18,491	18,998	23,603	
November			20,078	22,409	23,557	27,732	32,875	
December			23,004	22,650	25,706	28,482	32,948	
total		189,013	258,460	276,929	309,122	359,323	407,806	
by cruise ^{2/}		56,473	94,021	97,377	86,247	66,366	71,450	
grand total		245,486	352,481	374,306	395,369	425,689	479,256	

1/ "Visitors" includes only long and short stay visitors

2/ See Table 2.60 for monthly breakdown. See also Table 2.54.

Source: Jamaica Tourist Board Annual Reports.

NOTE: The report states that Jamaican nationals resident abroad and returning for a holiday are not included in the statistics which results, according to report, in 'serious distortions'.

Table 2.54

JAMAICA - Foreign Visitors to Jamaica by Type of Visit

	1960	1965	1968 ¹	1969	1970	1971	1972	1973
<u>No. of foreign visitors</u>								
Long stay ^{1/}	80,420	175,769	239,961	255,681	281,616	331,086	374,625	
Short stay ^{2/}		13,244	18,499	21,248	27,506	28,237	33,181	
Cruise ^{3/}	146,525	56,473	94,021	97,377	86,247	66,366	71,450	
Armed Forces		54,772	43,866	32,799	19,351	22,875	14,232	
Total foreign visitors	226,945	300,258	396,347	407,105	414,720	448,564	493,488	
Total excluding armed forces		245,486	352,481	374,306	395,369	425,689	479,256	
Total long and short stay visitors		189,013	258,460	276,929	309,122	359,323	407,806	
<u>Percentage of Total</u>								
Long stay	35.4	58.5	60.5	62.8	67.9	73.8	75.9	
Short stay		4.4	4.7	5.2	6.6	6.3	6.7	
Cruise	64.6 ^{3/}	18.8	23.7	23.9	20.8	14.8	14.5	
Armed Forces		18.2	11.1	8.1	4.7	5.1	2.9	
Total foreign visitors	100	100	100	100	100	100	100	

1/ 3 nights.

2/ 1-2 nights.

3/ Not diversified at that stage.

NOTE: The definition of foreign visitors in Jamaica includes:
 long stay tourists (3 nights); cruise passengers;
 short stay tourists (1-2 nights); Armed Forces (on leave).

Table 2.55

JAMAICA - U.S. Visitors by State of Residence

		1969	1970	1971	1972	1973
	1. No. of visitors					
	2. % of total U.S. visitors					
New York	1.	57,053		67,807		
	2.	26.6		23.2		
Florida	1.	15,750		22,029		
	2.	7.4		7.5		
New Jersey	1.	15,313		22,887		
	2.	7.2		7.8		
Illinois	1.	13,797		24,455		
	2.	6.4		8.4		
Pennsylvania	1.	11,621		16,517		
	2.	5.4		5.7		
Total (5 States)	1.	113,534		153,695		
	2.	53.0		52.6		

Table 2.56

JAMAICA - Long and Short-Stay (excluding Cruise) Visitors by Area of Residence

year/ country	1. No. of visitors								
		1960	1965	1968	1969	1970	1971	1972	1973
	2. % of total								
U.S.A.	1.		134,797	201,790	214,140	245,689	292,460		
	2.		76.7	78.1	77.3	79.5	81.4		
Canada	1.		19,071	24,526	27,101	25,164	28,165		
	2.		10.9	9.5	9.8	8.1	7.8		
United Kingdom	1.		6,310	9,694	9,226	10,101	9,243		
	2.		3.6	3.8	3.3	3.3	2.6		
Europe	1.		2,812	5,340	5,192	5,842	6,422		
	2.		1.6	2.1	1.9	1.9	1.8		
Commonwealth Caribbean	1.		4,781	6,001	7,075	7,780	8,716		
	2.		2.7	2.3	2.6	2.5	2.4		
Latin America	1.		3,340	5,324	6,385	6,135	5,656		
	2.		1.9	2.1	2.3	2.0	1.6		
Others	1.		4,658	5,785	7,810	8,411	8,661		
	2.		2.7	2.2	2.8	2.7	2.4		
Total	1.		175,769 ^{1/}	258,460	276,929	309,122	359,323		
	2.		100	100	100	100	100		

^{1/} Different factors were used before 1966 to distinguish between long and short-stay visitors.

Table 2.37

JAMAICA - Total Visitor Arrivals ^{1/} and Average Length of Stay (Nights)

	1960	1965	1968	1969	1970	1971
1. Number of stop-over visitors ^{2/}		189,013	258,460	276,929	309,122	359,323
2. Average length of stay (Nights) ^{3/}		8.9	8.5	8.5	8.1	8.1

1/ For monthly breakdown see Table 2.53.

2/ Long and short-stay visitors

3/ Note difference to visitor data

Table 2.58

JAMAICA - Stop-over Visitors by Mode of Transport

landed at/ month	Kingston		Montego Bay	Other Sea	Total
	Sea	Air	Air		
January	619	13370	29260	141	43390
February	727	11581	25766	398	38472
March	230	9756	28954	139	39079
April	100	11046	31232	28	42406
May	61	9002	18736	30	27829
June	45	6738	17400	---	24183
July	69	12533	23300	6	35908
August	155	16622	27088	19	43884
September	96	8217	14890	26	23229
October	39	6842	16703	19	23603
November	49	9021	23776	29	32875
December	<u>43</u>	<u>10451</u>	<u>22420</u>	<u>34</u>	<u>32948</u>
TOTAL	2233	125179	279525	869	407806

Table 2.59

JAMAICA - Foreign Visitor Arrivals by Mode of Transport - 1960-1972

	1960	1965	1968	1969	1970	1971	1972
Kingston - Air	26,416	61,863	94,643	95,983	110,219	147,502	125,179
- Sea	<u>597</u>	<u>1,129</u>	<u>1,799</u>	<u>3,056</u>	<u>2,043^{2/}</u>	<u>1,131^{2/}</u>	<u>3102^{2/}</u>
	27013	62,992	96,442	99,039	112,262	148,633	128,281
Montego Bay ^{1/}	53,407	112,777	162,018	177,890	196,860	210,690	279,525
Total Air Arrivals	79823	174640	256661	273873	307079	358192	404704
% of Subtotal	99.3	99.4	99.3	98.9	99.3	99.7	99.2
Total Sea Arrivals	597	1,129	1,799	3,056	2,043	1,131	3102
% of Subtotal	0.7	0.6	0.7	1.1	0.7	0.3	0.8
Subtotal ^{4/}	80,420	175,769 ^{3/}	258,460	276,929	309,122	359,323	407,806
Cruise visitors ^{4/}		56,473	94,021	97,377	86,247	66,366	71,450
% of Total		24.3	26.7	26.0	21.8	15.6	14.9
Total		232,242	352,481	374,306	395,369	425,689	479,256

^{1/} Montego Bay arrivals come by air only.

^{2/} Includes arrivals at ports other than Kingston as follows: 1970 - 248; 1971 - 69; 1972 - 869.

^{3/} Long-stay visitors only.

^{4/} Compare Table 2.53.

Table 2.60

JAMAICA - Annual and Monthly Cruise Visitor Arrivals

	1960	1965	1968	1969	1970	1971	1972	1973
January		9,026	14,932	12,475	13,809	8,556	5,563	
February		8,857	11,671	15,702	13,743	13,183	5,063	
March		8,308	11,526	16,000	12,390	6,291	11,397	
April		3,019	10,128	8,354	7,483	6,072	5,852	
May		3,109	3,513	5,474	5,104	6,965	6,926	
June		3,310	5,480	4,997	3,880	4,423	3,951	
July		2,091	5,310	9,539	5,739	4,754	5,558	
August		3,717	4,422	7,377	5,142	5,947	6,781	
September		1,940	4,544	2,974	3,049	2,364	1,924	
October		3,262	6,484	2,799	2,951	1,274	3,771	
November		3,651	4,017	4,880	5,049	3,483	6,292	
December		6,102	11,940	6,806	7,908	4,054	8,373	
Total		56,392	93,967	97,377	86,247	67,366	71,451	

Table 2.61

JAMAICA - Average Length of Stay - Nights

	1960	1965	1968	1969	1970
January		9.1	9.6	9.5	9.4
February		8.9	9.4	9.3	9.0
March		10.7	9.8	9.9	8.9
April		9.9	9.2	9.2	8.2
May		8.6	7.7	8.3	6.8
June		8.2	8.0	7.2	6.8
July		8.0	7.8	8.1	7.9
August		9.8	8.9	9.9	9.3
September		10.4	9.3	5.9	8.8
October		7.1	6.8	6.4	6.4
November		7.4	7.0	6.5	6.0
December		8.4	8.5	8.0	7.7
Total		8.9	8.5	8.5	8.1

MONTSERRAT

Statistics

The Tourist Board and 1973 Statistical Digest provided information from E/D cards about visitor arrivals. The Treasury's returns from occupancy tax enabled calculation of bednight figures (Table 2.65).

Annual and Monthly Visitor Arrivals

Visitor arrivals numbered nearly 20,000 in 1972, of which 12,500 visitors are described as vacationers (Table 2.62) and about 1,000 as cruise ship visitors. The remaining 37% are business visitors, transits and others.

Arrival figures present a depressing picture of decline in absolute numbers from 1969 to 1972. Visitor arrivals trebled between 1965 and 1968 and continued to grow in 1969, but growth in the tourist sector was limited and has not been sustained.

Stopover visitors have increased substantially since 1968, at a rate of 16.5% p.a. Nevertheless, annual figures fluctuate fairly widely and there was a fall in total numbers of visitors, from 8,382 in 1970 to 7,270 in 1971.

Monthly figures are available for 1970 only (Table 2.62) when visitor arrivals reached a peak in December. January and February were also good months, and the quarterly distribution figures indicated well-marked seasonal changes. February is reported to be the peak time for hotel visitors and December that for arrival of friends and relatives, or persons wanting villas.

Visitor Arrivals by Country of Origin

Country of residence is recorded separately for tourist arrivals (Table 2.64) and for total visitors (Table 2.63). Tourist arrival figures show numerical increases over the period 1968-72 for residents of the three principal tourist-generating countries: the U.S.A., Canada and U.K. The share of visitors from the U.S.A. and Canada declined from 62% in 1968 to 44% in 1972; U.K. visitors increased from 5% to 6% of total. Since visitors from other unspecified countries constituted 50% of total tourists in 1972, it seems important to identify their countries of origin.

In 1972, 50% of tourist arrivals comprised residents of the U.S.A., Canada and the U.K., whereas business and transit visitors comprised only 39%. Nearly half the visitors in 1972 (10,600 persons) compared with 32% (2,400 visitors) in 1968, were residents of Barbados and the Leeward and Windward Islands. Other Caribbean countries contributed 4.8% of visitor arrivals in 1972, but the proportion of tourist arrivals from these countries is not known.

Average Length of Stay

Table 12 in the 1973 Statistical Digest indicates how many visitors stay one day, up to one week, up to one month, and more than one month. It is impossible to calculate average length of stay from the figures, but it is significant that about 40% of the visitors stayed longer than four weeks in 1972, while only 5% stayed that long in 1965.

Montserrat is known to attract a large number of elderly visitors. The island contains a number of recent subdivisions where many have built retirement homes, which may be sublet part of the year. Property agents estimate that persons renting villas generally stay between 10 days and three weeks on average, and a few stay 6 or 12 weeks.

A tourism consulting firm has estimated that the average length of stay in 1971 was 12 days. This seems reasonable, considering that visitors to hotels stay for shorter periods on average than do those staying in villas or private homes. The estimate is comparable with Grenada, where tourism has developed on similar lines.

Table 2.62

MONTERRAT - Visitor Arrivals and Mode of Transport

	1960	1965	1968	1969	1970	1971	1972					
Air			5984	7181	8209	7121	10449					
% of Total			84.0	90.3	80.5	78.5	83.4					
Sea			231	294	173	149	1014					
% of Total			3.2	3.7	1.7	1.6	8.1					
Subtotal (stop-over visitors)			6215	7475	8382	7270	11463					
Cruise ship passengers			910	478	1821	1803	1066					
% of Total			12.8	6.0	17.8	19.9	8.5					
TOTAL			7125	7953	10203	9073	12529					
VISITOR ARRIVALS BY MONTH - 1970												
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
990	1405	932	818	706	510	737	976	429	435	636	1629	10203
VISITOR ARRIVALS BY PURPOSE OF VISIT												
					1965	1968	1969	1970	1971	1972		
Vacation					3817	7125	7953	10203	9073	12529		
% of total					73.5	41.6	39.6	52.5	49.2	63.0		
Business, transit, other					1377	10016	12135	9221	9358	7356		
% of total					26.5	48.4	60.4	47.5	50.8	37.0		
TOTAL					5194	17141	20088	19424	18431	19885		

Source: 1973 Statistical Digest - tourist visitors only

Table 2.63

MONTSERRAT - Visitor Arrivals and Country of Origin^{1/}

	Numbers of visitors						% distribution of visitors							
	1960	1965	1968	1969	1970	1971	1972 ^{2/}	'60	'65	'68	'69	'70	'71	'72
United States, Puerto Rico Virgin Islands		3282	5988	6895	5142	4132	5442		43.8	34.5	34.3	26.5	22.4	
Canada		765	1106	1880	1489	1720	1371		10.1	6.5	9.4	7.7	9.3	
United Kingdom		362	492	646	486	757	1010		4.8	2.9	3.2	2.5	4.1	
Leeward Islands, Windward Isles, Barbados		2413	8033	8313	10346	8758	10617		32.2	47.1	41.4	53.3	47.5	
Trinidad, Jamaica, Bahamas, Br. Honduras		416	963	1918	1280	1556	974		5.6	5.7	9.5	6.6	8.4	
Other countries		259	559	436	681	1508	743		3.5	3.3	2.2	3.4	6.2	
Total		7488	17141	20088	19404	18431	19885		100	100	100	100	100	

Source: Tourist Board

^{1/} Includes tourist, business, transit and other visitors. Slight discrepancies between totals by purpose of visit and totals by country of residence not explained.^{2/} Error in 1972 distribution figures.

Table 2.64

MONTISERRAT - Visitor Arrivals and Country of Origin^{1/}

	Numbers of visitors					% distribution of visitors				
	1968	1969	1970	1971	1972	'68	'69	'70	'71	'72
United States	3484	3303	3417	3219	4200	48.9	41.5	33.5	35.5	33.5
Canada	985	710	1116	917	1279	13.8	8.9	10.9	10.1	10.2
United Kingdom	367	336	620	384	779	5.2	4.2	6.1	4.2	6.2
Other countries	2289	3604	5050	4553	6271	32.1	45.4	49.5	50.2	50.1
Total	7125	7953	10203	9073	12529	100	100	100	100	100

^{1/} Tourists only.

Table 2.65

MONTSERAT - Bednights in Hotels and Guest Houses by Month

	1968	1969	1970	1971	1972
January	798	474	1149	944	384
February	49	97	2346	1689	1161
March	2298	3033	699	2203	2261
April	1670	1997	2102	2428	2307
May	314	1438	1372	2074	1316
June	76	531	574	619	550
July	1918	654	389	797	469
August	693	527	634	845	1552
September	542	546	908	872	574
October	256	544	573	999	452
November	665	343	488	651	299
December	474	540	906	1062	377
Total	9753	10724	12140	15183	11703

Source: Occupancy tax revenue

NETHERLANDS ANTILLES

Statistics

Statistics are based on figures from the Aruba and Curacao Tourist Bureau, with some figures from the Caribbean Travel Association's "Report of Tourist Travel to the Caribbean 1968, 1969, 1970".

Annual and Monthly Visitor Arrivals

There were 244,000 stopover visitors to the Netherlands Antilles in 1971 (Table 2.67). Curacao was the first point of entry for about 45% of stopover visitors, 35% went first to Aruba, 18% to St. Maarten and 2% to Bonaire.

Some 73,000 tourists visited the Netherlands Antilles in 1965 and the numbers increased rapidly in the succeeding three years. Rates of increase have slackened since 1968, but an 11% annual growth average was maintained between 1968 and 1971. Stopover arrivals did not increase between 1968 and 1969 as in many other Caribbean Islands. Fastest visitor growth rates since 1965 have been achieved in St. Maarten. The other small island, Bonaire, actually received fewer visitors in 1971 than in 1965. Curacao, which receives most of the group's visitors, has not increased its traffic as rapidly as Aruba.

Statistics show that between 65% and 70% of visitors to Aruba and Curacao stay in hotels. Hotel visitors were declining proportionately between 1965 and 1969, but they increased in 1970 to 70%.

Visitor Arrivals by Country of Origin

Statistical tables show country of residence of visitors to each island separately (Table 2.66). The composition of visitors to the Netherlands Antilles is quite different from that of other Caribbean Islands and reflects different cultural patterns, international relations and flight connections.

U.S. residents are the largest group visiting Curacao and they have increased from 34% of total visitors in 1965 to 42% in 1971. Venezuelans usually constitute about one third of total visitors and approximately 8% of visitors in 1971 were from the Netherlands. Visitors from the Dominican Republic (5%) were more significant than Canadian and British residents combined.

Aruba is dominated by visitors from the U.S.A., whose share has increased from 66% in 1965 to 72% in 1971. More than 20% of arrivals are Venezuelans or Colombians.

Figures for St. Maarten and Bonaire are incomplete, but they suggest that St. Maarten is mainly dependent upon U.S. visitors.

Average Length of Stay

Average length of stay varies for each island (Table 2.69) and in 1971 was 6.2 days in Aruba, 5.1 days in Curacao, 5 days in St. Maarten and 3.1 days in Bonaire. These figures suggest that size of island, accessibility and availability of resort facilities affect length of stay. The average length of stay has changed from year to year, but the difference between 1960 and 1972 figures is not substantial.

Hotel guests in Curacao and Aruba stay for periods shorter than the overall average for stopover visitors.

Transport Mode

Nearly all stopover visitors to Aruba and St. Maarten arrive by air (Table 2.68). In 1970, 11% of visitors to Curacao arrived by sea, but there are no recent statistics to indicate whether this trend has continued. Cruise ship arrivals are substantial, equivalent to about 50% of the total (Table 2.67). Some 99,000 cruise visitors went to Curacao in 1971 and 81,000 to St. Maarten. St. Maarten's cruise traffic has grown rapidly since 1960, when there were only 225 visitors and seems to have expanded at the expense of Aruba, which attracted only 27,000 cruise visitors in 1971.

Table 2.66

NETHERLANDS ANTILLES - Visitor Arrivals by Island and by Country of Residence

	1960	1965	1968	1969	1970	1971	% distribution of visitors					
							1960	1965	1968	1969	1970	1971
<u>Curacao</u>												
United States	6,912	14,982	43,895	41,567	42,514	45,958	22.4	33.7	43.2	45.7	41.7	42.4
Venezuela		14,063	33,764	24,879	31,297	32,282		31.6	33.2	27.3	30.8	29.7
Netherlands		4,286	6,760	6,101	7,396	8,582		9.6	6.7	6.7	7.3	7.9
Colombia		892	1,398	1,588	2,098	2,830		2.0	1.4	1.8	2.1	2.6
Dominican Republic		5,063	4,951	6,285	5,978	5,381		11.4	4.9	6.9	5.9	5.0
Canada & U.K.		1,160	1,434	2,923	3,628	3,965		2.6	1.4	3.2	3.6	3.7
Other		4,044	9,350	7,674	8,730	9,415		9.1	9.2	8.4	8.6	8.7
Total	30,858	44,490	101,552	91,017	101,641	108,413	100.0	100.0	100.0	100.0	100.0	100.0
<u>Aruba</u>												
United States	4,073	16,853	36,145	41,401	54,313	61,543	31.0	66.0	69.5	70.1	72.4	71.7
Venezuela	5,366	4,346	8,849	7,603	11,610	15,156	40.9	17.0	17.0	12.9	15.5	17.7
Colombia	686	1,856	1,596	1,703	2,107	2,366	5.2	7.3	3.1	2.9	2.8	2.8
U.K. & Commonwealth	673	949	908	2,139	1,960	2,842	5.1	3.7	1.7	3.6	2.6	3.3
Other	2,327	1,520	4,504	6,174	5,052	3,848	17.8	6.0	8.7	10.5	6.7	4.5
Total	13,125	25,524	52,002	59,020	75,042	85,754	100.0	100.0	100.0	100.0	100.0	100.0
<u>Bonaire</u>												
United States	310	2,885	3,751	2,577	2,453	1,438	19.9	49.0	43.8	39.4	33.1	25.8
Total	1,555	5,887	8,563	6,540	7,410	5,573	100.0	100.0	100.0	100.0	100.0	100.0
<u>St. Maarten</u>												
United States	1,530	5,580	11,310				72.5	75.0	64.8			
Total	2,110	7,444	17,445	20,349	33,472	44,265	100.0	100.0	100.0	100.0		

Table 2.67

NETHERLANDS ANTILLES - Visitor Arrivals by Island and by Purpose of Visit

	<u>1960</u>	<u>1965</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>
<u>CRUISE SHIP PASSENGER ARRIVALS</u>						
Aruba	16188	14815	25469	35885	44659	27474
Bonaire	-	-	1145	3545	4362	2399
Curacao	45133	52950	85165	92255	110854	98619
St. Maarten	225	13696	39926	51071	57841	80561
TOTAL	61546	81461	151705	182756	217716	209053
<u>STAY-OVER VISITORS</u>						
Aruba	13125)	25524	52002	59020	75042	85755
Bonaire	1555)	5887	8563	6540	7410	5573
Curacao	30858)	44490	101552	91017	101641	108413
St. Maarten	2110)	7444	17445	20349	33472	44265
Less: Visitors to more than one island		(9885)				
TOTAL	47648)	73460	179562	176926	217565	244006
<u>TOTAL VISITORS</u>	<u>109194</u> ^{1/}	<u>154821</u>	<u>331267</u>	<u>359682</u>	<u>435281</u>	<u>453059</u>
<u>HOTEL VISITORS</u>						
Aruba		20172	42401	48767	63962	
Bonaire		4620	-	-	-	
Curacao		36771	75885	65791	81651	
St. Maarten		5944	-	-	-	
Less: Visitors to more than one island		(7677)				
TOTAL		61100 ^{2/}	118286	114558	145613	
Cruise ship passengers as % of all tourists	56.3	52.6	45.7	50.8	50.0	46.1
Hotel visitors to Aruba and Curacao as % of all stay-over visitors		77.5	65.9	64.8	66.9	

1/ Figures taken from Table 2.66.

2/ Discrepancy in Total.

Source: Aruba Tourist Board.

Table 2.68

NETHERLANDS ANTILLES - Visitor Arrivals by Mode of Transport and by Island

	1965	1968	1969	1970	1971	1972
<u>ARUBA</u>						
Air	-	51175	58227	73813		
% of total		98.4	98.7	98.4		
Sea		827	793	1229		
% of total		1.6	1.3	1.6		
TOTAL	<u>25524</u>	<u>52002</u>	<u>59020</u>	<u>75042</u>	<u>85755</u>	<u>72984</u>
<u>BONAIRE</u>						
Air	-	-	-			
% of total						
Sea	-	-	-			
% of Total						
TOTAL	<u>5887</u>	<u>8563</u>	<u>6540</u>	<u>7410</u>	<u>5573</u>	
<u>CURACAO</u>						
Air	-	101552	88845	90654		
% of total		-	97.6	89.2		
Sea			2172	10987		
% of total			2.4	10.8		
TOTAL	<u>44490</u>	<u>101552</u>	<u>91017</u>	<u>101641</u>	<u>108413</u>	<u>69841</u>
<u>ST. MAARTEN</u>						
Air		42826	59237	84221		
% of total		98.1	98.8	99.9		
Sea		828	711	123		
% of total		1.9	1.2	0.1		
TOTAL	<u>7444</u>	<u>43654</u>	<u>59948</u>	<u>84344</u>		
<u>GRAND TOTAL</u>	<u>73460</u> ^{1/}	<u>205771</u>	<u>216525</u>	<u>268437</u>		
Aruba Tourist Board Figures for St. Maarten ^{2/}	7444	17445	20349	33472	44265	
Grand total	73460	179562	176926	217565	244006	

1/ Excludes visitors counted in more than one island. See Table 2.67.

2/ See Table 2.66

Source: CIA "Report of tourist travel to the Caribbean" 1968, 1969, 1970.

Table 2.69

NETHERLANDS ANTILLES - Annual Bednights and Average Length of Stay

	1960	1965	1968	1969	1970	1971	1972
Total Bednights - Stopover visitors							
Curacao	164257	215360	466261	488360	528308	552267	380899
Aruba	94607	164259	321117	383814	490954	530850	598095
Bonaire	4185	20678	26546	25524	26423	17133	
St. Maarten		56139	83802	101890	140177	221227	
TOTAL		456436	897726	999588	1185862	1321477	
Hotel Guest Nights							
Curacao	96949	129978	288513	287299	301071	337845	235956
Aruba	38949	92241	234214	282934	368133	413590	346400
St. Maarten		22544	75000	92400	132700		
<u>AVERAGE LENGTH OF STAY OF VISITORS (DAYS)</u>							
Curacao	5.5	4.8	4.6	5.4	5.2	5.1	5.5
Aruba	7.2	6.4	6.2	6.5	6.5	6.2	8.2
Bonaire	2.7	3.5	3.1	3.9	3.6	3.1	
St. Maarten		7.5	4.8	5.0	4.2	5.0	
<u>AVERAGE LENGTH OF STAY IN HOTELS</u>							
Curacao		3.5	3.8	4.4	3.7	4.1	4.3
Aruba		4.5	5.5	5.8	5.8	5.6	5.7

Source: Based on figures from Curacao and Aruba Government Tourist Bureau, Bureau of Statistics, and Arthur D. Little, Inc.

PUERTO RICO

Statistics

The tables are compiled from the Tourism Development Company's annual reports. Entry and departure cards are not useful sources in Puerto Rico, because visitors from the U.S. mainland are not distinguished from Puerto Ricans for immigration purposes. Therefore, much information is collected from hotel surveys.

Annual and Monthly Visitor Arrivals

Annual stopover visitors numbered 1,173,000 in fiscal year 1971-72 (Table 2.70); therefore Puerto Rico received more visitors than any other territory in the Caribbean. The Bahamas, which also receives more than a million visitors per annum, may attract more tourists than Puerto Rico, which has a considerable number of business and convention visitors.

In 1960/61, there were 355,000 visitors, a tourist inflow similar to that of Bermuda and Jamaica ten years later. Average annual growth rates between 1960 and 1971 were about 11%, but in the period 1968-71 growth slowed to about 3% p.a.

Guests staying in San Juan hotels constitute slightly less than half the estimated stopover visitors to Puerto Rico. About 60% of foreigners staying in San Juan hotels and guest houses arrive purely for recreational purposes; about 20% arrive for business purposes and another 15% combine business and pleasure. However hotel guests in San Juan may not be representative of all visitors. An estimated 7% of all stopover visitors travel in groups or attend conventions.

Visitor Arrivals by Country of Origin

Almost 90% of foreign visitors to hotels and guest houses in San Juan are residents of the U.S.A. and this proportion has not changed significantly since 1960 (Table 2.71). More than 50% are residents of New York and New Jersey, with 70% from the Eastern Seaboard (Table 2.72). Visitors from other Caribbean countries are the second largest group, forming 6% of the 1971/72 total. Approximately half are from the neighboring U.S. Virgin Islands and 30% come from the Dominican Republic. A further 2% are South Americans and 1% Europeans. The composition of visitors has remained stable since 1960.

Average Length of Stay

Information is available for hotel guests in San Juan only (Table 2.73). An average length of stay of five days is indicated in 1960, rising to six days in 1968 and returning to five days in 1972. The average is short, compared with estimates for Jamaica, Haiti and other large or well-developed

islands. Clearly the statistics reflect the large proportion of business visitors and conventioners, who typically stay only two or three days. There is evidence from Haiti, the Netherlands Antilles and elsewhere that hotel guests generally stay for shorter periods than do other visitors. Therefore, the average length of stay for all stopover visitors in Puerto Rico is likely to be longer than the San Juan hotel statistics indicate.

Mode of Transport

There is a ferry service to the U.S. Virgin Islands, but the great majority of visitors arrive by air. Cruise ship passengers totalled 261,000 in 1971/72 and constituted 18% of visitor arrivals. Cruise arrivals have grown rapidly since 1960, particularly in 1971/72, when they increased by 60% over the previous year.

Day visitors other than cruise ship passengers are identified in the tables. Little is known about their origin or other characteristics. Their numbers declined sharply in 1970/71, which may have been due to changes in transport links, such as the closure of a ferry service; however the difference is too dramatic to be accounted for by a growing preference for week-end trips for example.

Table 2.70

PUERTO RICO - Total Visitor Arrivals and Purpose of Visit

	1960-61	1965-66	1968-69	1969-70	1970-71	1971-72
Annual stop-over visitors	354,963	723,543	1,067,511	1,088,379	1,095,119	1,172,885
Cruise passengers	42,322	95,970	122,451	136,604	163,771	261,159
Other day visitors	177,421	286,103	364,390	159,659	28,288	32,452
TOTAL VISITORS	574,706	1,105,616	1,554,352	1,384,642	1,287,178	1,466,496
Visitors in groups + conventions	11,962	48,795	84,650	82,397	73,026	85,258
% of total stopover visitors	3.4	6.7	7.9	7.6	6.7	7.3
Visitors staying in hotels and guest houses in San Juan	175,487	355,725	514,234	529,480	488,740	526,159
% of total stopover visitors	49.4	49.2	48.2	48.6	44.6	44.9

PURPOSE of VISIT to SAN JUAN Hotels^{1/}

	1960	1965	1968	1969	1970	1971	1972 ^{2/}
Recreation	65	70	72	69	61	62	58
Business	21	19	13	16	23	21	24
Business and recreation	11	7	14	14	15	16	16
Miscellaneous	3	4	1	1	1	1	2

^{1/} Percentages of Non-Resident Guests

^{2/} Preliminary

Source: Selected Statistics
Tourism Development Co.

Table 2.71

PUERTO RICO - Hotel Visitors in San Juan by Country of Residence

						% distribution of visitors				
	1959-60	1968-69	1969-70	1970-71	1971-72	1959-60	1968-69	1969-70	1970-71	1971-72
U.S.A. ^{1/}	168,216	458,688	453,498	427,873	472,573	91.2	91.1	89.9	89.	89.3
Central America	496	774	941	1,850	1,443	0.3	0.2	0.2	0.4	0.3
South America	4,432	6,617	8,127	9,257	9,438	2.4	1.3	1.6		1.8
Caribbean countries ^{2/}	8,427	24,943	29,283	29,378	32,619	4.6	5.0	5.8		6.2
Europe	1,799	5,329	6,132	6,166	6,340	0.9	1.0	1.2	1.3	1.2
Other countries	1,022	6,927	6,333	6,066	6,520	0.6	1.4	1.3		1.2
TOTAL	184,391	503,278^{3/}	504,314^{3/}	480,590^{3/}	528,933	100.0	100.0	100.0	100.0	100.0

^{1/} See Table 2.72 for breakdown^{2/} See breakdown below^{3/} Differs from total in Table 2.70 because some hotels did not report origins of visitorsCARIBBEAN VISITORS by country of residence (nationality)

Cuba	1,113	73	71	60	75	(13)	0.3	0.2	0.2	0.2
Dominican Republic	627	7,367	9,304	9,955	9,248	(7)	29.5	31.8	33.9	28.4
Virgin Islands	4,361	11,264	13,399	13,264	15,253	(52)	45.2	45.8	45.1	46.8
Others	2,386	6,239	6,509	6,099	8,043	(28)	25.0	22.2	20.8	24.6
TOTAL	8,487^{a/}	24,943	29,283	29,378	32,619	(100)	100.0	100.0	100.0	100.0

^{a/} Error in breakdown

Table 2.72

PUERTO RICO - Hotel Visitors to San Juan by State of Residence in the U.S.A.

	1959-60	1968-69	1969-70	1970-71	1971-72	<u>% distribution of visitors</u>				
						1959-60	1968-69	1969-70	1970-71	1971-72
New York	74,351	188,098	186,323	172,025	193,709	44.2	41.0	41.1	40.2	41.0
New Jersey	11,398	54,076	53,490	48,104	56,909	6.8	11.8	11.8	11.2	12.0
Florida	10,144	21,050	21,729	23,615	24,610	6.0	4.6	4.8	5.5	5.2
Pennsyl- vania	8,194	27,665	26,146	25,214	23,405	4.9	6.0	5.8	5.9	4.9
Illinois	6,524	16,912	15,674	15,794	15,201	3.9	3.7	3.5	3.7	3.2
Massachu- setts	6,100	18,276	21,360	18,656	21,071	3.6	4.0	4.7	4.4	4.5
Connecticut	4,963	15,540	14,940	14,270	13,937	3.0	3.4	3.3	3.3	3.0
California	4,280	14,359	14,290	12,271	13,647	2.5	3.1	3.1	2.9	2.9
Others	42,262	102,712	99,546	97,924	110,084	25.1	22.4	21.9	22.9	23.3
TOTALS	168,216	458,688	453,498	427,873	472,573	100.0	100.0	100.0	100.0	100.0

Table 2.73

PUERTO RICO - Bednights in San Juan Hotels and Guest Houses and Average Length of Stay

	<u>1960-61</u>	<u>1965-66</u>	<u>1968-69</u>	<u>1969-70</u>	<u>1970-71</u>	<u>1971-72</u>
Visitors staying in Hotels & Guest Houses ^{1/}	175,487	355,725	514,234	529,480	488,740	526,159
Bednights	917,849	2,023,569	3,160,385	2,999,549	2,803,757	2,825,626
Average Length of Stay (days)	5.2	5.7	6.2	5.7	5.7	5.4

^{1/} Excludes P.R. residents staying in hotels

ST. KITTS-NEVIS

Statistics

St. Kitts-Nevis uses the E/D card commonly adopted by Caribbean territories. Characteristics of visitor arrivals derived from it were obtained from the St. Kitts-Nevis-Anguilla Tourist Board.

Annual and Monthly Visitor Arrivals

There were 16,200 stopover visitors in 1972 (Table 2.75), indicating a very modest tourism industry. Annual growth rates have also been small, averaging 5.6% p.a. since 1968. In 1971 there were nearly 2,000 visitors fewer than in 1970, but growth trends were re-established in 1972.

No data are available for monthly arrivals.

Visitor Arrivals by Country of Origin

The nationality of stopover visitors to St. Kitts-Nevis-Anguilla is taken from entry and departure cards. The proportion of U.S. visitors has declined, though not the total number: declining from 36% in 1968 to 26% in 1972. Visitors from other Caribbean countries form the largest single group, comprising 61% in 1971 and 1972 (Table 2.74). Antiguans constitute 17% of all arrivals and visitors from the neighboring Dutch West Indies comprise 11% (Table 2.76). They outnumber visitors from Canada (6%) and from the U.K. (5%). The inflow of international tourists to St. Kitts-Nevis is clearly very small.

Average Length of Stay

The Statistical Department's survey of hotels, guest houses and villas provided the following estimates:

	Average Length of Stay (Days)
January 1973	4.2
February 1973	6.1
March 1973	5.5
April 1973	4.3

There was a considerable range in lengths of stay, with some visitors to villas and guest houses remaining for 4 weeks or more. Longer averages were indicated in the peak season.

Transport Mode

Sea arrivals are small in number (Table 2.77), contributing less than 2% to total stopover visitors in 1972. The number of cruise ship passengers has declined since 1968. In 1972, there were about 4,500 cruise visitors, constituting 22% of all visitor arrivals.

Table 2.74

ST. KITTS-NEVIS - Visitor Arrivals and Country of Origin

	Numbers of visitors					% distribution of visitors				
	1968	1969	1970	1971	1972	'68	'69	'70	'71	'72
United States	3,525	3,988	3,890	4,023	4,151	36.0	33.9	28.9	26.6	25.6
Canada	685	753	893	790	1,022	7.0	6.4	6.6	5.2	6.3
United Kingdom	455	558	648	705	807	4.6	4.7	4.8	4.7	5.0
Rest of Europe										
Central America										
South America	29	36	11	18	21	0.3	0.3	0.1	0.1	0.1
CARIBBEAN	4,948	6,313	7,766	9,217	9,920	50.5	53.6	57.6	61.0	61.0
Other countries	155	131	264	357	324	1.6	1.1	2.0	2.4	2.0
Total	9,797	11,779	13,472	15,105	16,245	100.0	100.0	100.0	100.0	100.0

Source: St. Kitts - Nevis - Anguilla Tourist Board.

Table 2.75

ST. KITTS-NEVIS - Total Visitor Arrivals and Purpose of Visit

	1960	1965	1968	1969	1970	1971	1972
Total stop-over visitors	5,901	7,166	9,797	11,779	13,472	15,105	16,245
Stop-over, non business and transit visitors	3,966	5,778	8,241	9,737	11,504	12,718	13,835
Business visitors	1,935	1,388	1,556	2,042	1,968	2,387	2,410
Temporary halt and cruise ship passengers	<u>16,786</u>	<u>20,357</u>	<u>55,127</u>	<u>49,842</u>	<u>48,099</u>	<u>47,366</u>	<u>47,605</u>
Total visitors	22,687	27,523	64,924	61,621	61,571	62,471	63,850

Table 2.76

ST. KITTS-NEVIS - Visitor Arrivals and Country of Origin ^{1/}

	1960	1965	Numbers of visitors ^{2/}					% distribution of visitors					
			1968	1969	1970	1971	1972	'60	'65	'68	'69	'70	'71
United States						4,023	4,151					26.6	25.6
Canada						780	1,022					5.2	6.3
United Kingdom						705	807					4.7	5.0
Rest of Europe						89	99					0.6	0.6
Central America						375	596					2.5	3.7
South America						18	39					0.1	0.2
Other Caribbean countries						8,980	9,336					59.5	57.5
Caribbean Detailed Analysis													
Trinidad and Tobago						649	733					4.3	4.5
Barbados						679	775					4.5	4.8
Guyana						138	91					0.9	0.6
Granada						90	24					0.6	0.1
St Vincent						253	86					1.7	0.5
St Lucia						162	191					1.1	1.2
Dominica						201	316					1.3	1.9
Antigua						2,352	2,768					15.6	17.0
Montserrat						576	604					3.8	3.7
Jamaica						162	214					1.1	1.3
Other British Territories						329	359					2.2	2.2
French W I						329	332					2.2	2.0
Dutch W I						2,103	1,825					13.9	11.2
Cuba						1	-					-	-
US Virgin Islands						956	1,018					6.3	6.3
TOTAL						8,980	9,336						
Other countries						125	195					0.8	1.2
Total						15,105	16,245					100.0	100.0

1/ Country of origin is defined as the nationality of the visitor.

2/ Excludes cruise.

Source: Digest of Statistics 1971
Statistical Dept.

Table 2.77

ST. KITTS-NEVIS - Visitor Arrivals and Mode of Transport

	1968	1969	1970	1971	1972
Air	9,504	11,488	13,189	14,686	15,991
% of stop-over visitors	97.0	97.5	97.9	97.2	98.4
Sea	293	291	283	419	254
% of stop-over visitors	3.0	2.5	2.1	2.8	1.6
Total stop-over visitors	9,797	11,779	13,472	15,105	16,245
Cruise ship passengers	7,187	6,933	5,442	1,722	4,682
% of grand total	42.3	37.1	28.8	10.2	22.3
Grand total	16984	18,712	18,914	16,827	20,927

ST. LUCIA

Statistics

The Tourist Board compiles data from E/D cards. Visitors could include some expatriates working abroad for short periods and some recent immigrants, because permanent residence status is the distinguishing factor between local and visitor arrivals.

Annual and Monthly Visitor Arrivals

St. Lucia, with some 42,000 visitors in 1972 (Table 2.78) has been the most successful of the Windward Islands (other than Barbados) in attracting tourists. Arrivals expanded rapidly in the 1960s, but growth rates slowed between 1968 and 1971, recovering somewhat in 1972, when visitor arrivals were 28% higher than in 1971.

August is usually the best month. Before 1972, visitors in July and August were generally more numerous than those in the winter months. However, the winter season from December 1971 to April 1972 was very good, with arrivals in February rising to 5,009.

Total Visitor Arrivals by Country of Origin

Visitor arrivals by nationality (Table 2.79) show that the major growth factor in St. Lucia's tourism industry has been increased demand from Canadian, British and South American visitors. Arrivals from other Caribbean territories, the largest group, have doubled in number since 1969 and constituted 43% of the total in 1972. The number of visitors from the U.S.A. was growing rapidly before 1970 but in 1972 represented only 18% of arrivals.

Average Length of Stay

The only data available on average length of stay are contained in two series of estimates by the Tourist Board. The first suggested that visitors stayed longer than two weeks. In a 1966 revision the average was estimated at under three days. The second series seems to be based on the assumption that visitors declaring their intention of staying between two and four weeks actually stay five days on average. Given these wide differences and the amount of hotel construction underway, it would seem essential for statistical and planning agencies to establish more accurate data.

Sea arrivals were once quite significant (20% of all stopover visitors in 1960), but they have declined in absolute numbers; in 1972, they represented less than 2% of all stopover visitors (Table 2.80). Cruise ship visitors increased greatly in the 1960s and since 1969, they have averaged about 40,000 per annum. St. Lucia also receives more than 1,000 yacht calls each year and is an attractive port-of-call for persons sailing down the Windward Islands.

Table 2.78

ST. LUCIA - Annual and Monthly Visitor and Tourist Arrivals

	VISITOR ARRIVALS					TOURIST ARRIVALS ^{1/}				
	1968	1969	1970	1971	1972	1968	1969	1970	1971	1972
January	1,520		2,432	2,586	3,242	1,257		2,086	2,181	3,031
February	2,048		3,095	3,170	5,318	1,809		2,785	2,783	5,009
March	2,004		3,287	2,592	4,651	1,768		2,946	2,187	4,407
April	1,881		2,311	3,054	4,328	1,608		1,980	2,671	3,984
May	1,448		2,059	2,363	2,480	1,188		1,664	2,034	2,238
June	1,535		1,654	2,031	2,498	1,221		1,352	1,646	2,266
July	2,961		2,642	2,724	3,712	1,669		2,358	2,391	3,361
August	2,976		3,065	3,469	3,865	2,737		2,805	3,204	3,676
September	1,420		1,958	2,306	2,695	1,181		1,582	2,004	2,385
October	1,518		2,007	2,243	2,589	1,188		1,549	1,915	2,286
November	1,776		2,175	2,759	3,058	1,490		1,775	2,445	2,802
December	2,566		2,844	3,921	3,963	2,394		2,414	3,663	3,817
Total	22,653^{2/}	25,382	29,529	33,198	42,399	19,510	21,869	25,296	29,124	39,262
Tourists as % of all visitors						86.1	86.2	85.7	87.7	92.6

^{1/} It is not known how tourist and other visitor arrivals are differentiated. Passengers arriving in June 1973 were not questioned at the airport. Tourist Board officials think that "occupation" stated on the E/D card may be used as an indicator, but this is clearly not a reliable method.

^{2/} Discrepancy in total.
Source: Tourist Board

Table 2.79

ST. LUCIA - Visitor Arrivals and Country of Origin

	Numbers of visitors						% distribution of visitors							
	1960	1965	1968	1969	1970	1971	1972	'60	'65	'68	'69	'70	'71	'72
United States	1,005	2,860	6,492	7,604	7,807	7,666	7,756	19.3	22.2	28.7	30.0	26.5	23.1	18.3
Canada	227	1,065	2,056	2,547	2,928	3,376	4,406	4.4	8.2	9.0	10.0	9.9	10.2	10.4
United Kingdom	332	1,457	2,907	3,764	4,741	5,240	7,159	6.3	11.3	12.8	14.8	16.1	15.8	16.9
Other Caribbean countries	3,073	6,443	9,289	9,176	11,310	13,426	18,368	59.0	49.9	41.0	36.2	38.3	40.4	43.4
Central America														
South America	-	269	86	25	200	801	1,844	-	2.1	0.4	0.1	0.9	2.4	4.3
Other countries	573	814	1,843	2,266	2,453	2,689	2,846	11.0	6.3	8.1	8.9	8.3	8.1	6.7
Total	5,210	12,908	22,653	25,382	29,529 ^{2/}	33,198	42,399	100.0	100.0	100.0	100.0	100.0	100.0	100.0

1/ Country of origin is defined as nationality of the visitor.

2/ Unexplained error.

Table 2.80

ST. LUCIA - Visitor Arrivals and Mode of Transport

	1960	1965	1968	1969	1970	1971	1972
Air	4,195	11,065	20,418	23,108	27,953	32,504	41,586
% of stop-over visitors	80.5	85.7	90.1	91.0	94.7	97.9	98.1
Sea	1,015	1,843	2,235	2,274	1,576	694	813
% of stop-over visitors	19.5	14.3	9.9	9.0	5.3	2.1	1.9
Total stop-over visitors	5,210	12,908	22,653	25,382	29,529	33,198	42,399
Cruise ship passengers (Intrastats)	2,858	10,948	23,261	40,541	40,837	42,859	37,267
TOTAL	8,068	23,856	45,914	66,923	70,366	76,057	79,666
Transit - Taht Callie		646	1,009	1,135	1,327	1,341	1,250

ST. VINCENT

Statistics

Statistics were provided by the Tourist Board, based on data from the Immigration authorities' analysis of E/D cards. The definition of "visitor" does not include returning residents.

Annual and Monthly Visitor Arrivals

St. Vincent not only has a small tourism industry (17,000 stopover visitors in 1972), but the number has been declining since 1970. August has been the busiest month each year since 1968 (Table 2.81). There was no discernible winter season in 1968 or 1969. The overall impression is that the tourism industry here is virtually undeveloped. St. Vincent is reported to attract wealthy tourists in search of remoteness and small, luxury hotels in St. Vincent and the Grenadines are reported to be full most of the year. The Tourist Board, however, is anxious to attract more visitors and maintains that poor communications impede progress. Air arrivals must change planes in Barbados and the local feeder service is said to be so unreliable that some tourists decide to remain in Barbados and omit St. Vincent from their holiday.

Table 2.85 shows the accommodation used by visitors to St. Vincent. In 1970, 55% of visitors stayed in hotels and guest houses, 37% stayed in private houses and self-catering accommodation and 8% on chartered yachts. In 1971, the distribution was similar: 51%, 40% and 9%, respectively. Hotel and guest house visitors and yacht charterers comprise a large share of total visitors arriving in the first half of the year; visitors to private homes and self-catering accommodation are more numerous in the latter part of the year.

This type of information, obtainable from E/D cards, is valuable for tourist planning and could usefully be collected by many other islands. Figures for St. Vincent may be indicative of visitor behaviour in Grenada and St. Lucia.

Total Visitor Arrivals by Country of Origin

Almost half the visitors to St. Vincent in 1972 were West Indians (Table 2.83) and in the ensuing four years, the number of West Indian visitors increased more rapidly than any other group. U.S. visitors also increased, from 2,900 in 1968 to 5,800 in 1972. Canadian visitors do not seem to be growing in number and those from the U.K. are declining.

Average Length of Stay

Estimates are made from information recorded at the airport when visitors are admitted. Thus it is not known how accurate they are (Table 2.82). Average length of stay of visitors arriving by air was about eight days in 1969-1972 and 5.4 days in 1968. Table 2.84 indicates that visitors in July/September, which seems to be the main tourist season, stay for longer periods on average. Visitors from the most distant countries (Canada and the U.K.) stay longer, while U.S. visitors stay longer than do West Indians.

Transport Mode

Visitor arrivals by sea totalled 1,200 in 1972, representing 1% of all stopover visitors (Table 2.86). This implies that sea transport is more significant to St. Vincent than to most Caribbean Islands, even though the proportion of sea arrivals is falling. The situation may reflect the air transport problem indicated by the Tourist Board.

In 1968 twice as many visitors arrived on cruise ships and other short-stay boats as came by air. In 1972, there were fewer transit sea arrivals, some 15,800, compared with 16,900 stopover visitors. Transient arrivals by sea enter St. Vincent and the Grenadines on yachts and other boats, in addition to cruise ships.

Table 2.81

ST. VINCENT - Annual and Monthly Stop-Over Visitor Arrivals

	1968	1969	1970	1971	1972
January	1,028	1,206	1,513	1,715	1,200
February	938	1,361	2,000	1,893	1,134
March	542	1,376	1,960	1,797	2,151
April	1,307	1,394	1,595	1,397	1,596
May	903	1,362	1,167	1,245	1,318
June	1,299	1,291	1,090	1,399	1,224
July	1,262	1,262	1,469	1,685	1,945
August	1,506	2,059	2,223	2,038	1,773
September	715	888	864	892	810
October	766	954	965	1,041	861
November	903	1,064	1,085	1,075	1,250
December	1,305	1,352	1,635	1,240	1,640
Total	12,472	15,569	17,586	17,407	16,902

1/ Includes air and sea arrivals.

Source: St. Vincent Tourist Board.

Table 2.82

ST. VINCENT - Annual and Monthly Visitor ^{1/} Days

	1968	1969	1970	1971	1972
January	5,768	8,268	10,201	12,713	8,668
February	5,300	11,200	14,308	14,636	7,269
March	1,689	8,598	12,891	11,812	15,394
April	5,269	6,539	10,342	9,406	10,690
May	2,690	5,260	7,537	7,134	7,636
June	6,633	8,082	7,399	7,160	10,532
July	5,066	10,413	11,566	13,636	18,379
August	8,887	13,240	20,679	17,020	15,232
September	3,249	4,761	5,888	4,181	5,014
October	260	6,082	6,322	7,918	4,857
November	5,245	6,128	6,958	9,983	9,681
December	5,317	11,931	12,856	10,597	13,371
Total (visitor days)	55,373	100,502	126,947	126,196	126,723
Total (visitors)	10,187	12,690	15,320	15,368	15,701
Average length of stay (Days)	5.4	7.9	8.0	8.2	8.1

^{1/} Air arrivals only.

Table 2.83

ST. VINCENT - Air Arrivals by Country of Origin

	1960	1965	Numbers of visitors					% distribution of visitors						
			1968	1969	1970	1971	1972	'60	'65	'68	'69	'70	'71	'72
United States			2,878	4,664	5,765	5,581	5,786			28.3	36.7	38.4	36.3	35.9
Canada			1,244	1,270	1,438	1,245	1,122			12.2	10.0	9.1	8.1	7.1
United Kingdom			1,222	1,443	1,621	1,037	879			12.0	11.4	10.2	6.7	5.6
Rest of Europe														
Central America														
South America														
Other Caribbean countries														
West Indies ^{1/}			3,706	4,414	5,988	7,017	7,331			36.4	34.8	37.9	45.7	46.7
Other countries			1,137	899	1,010	488	583			11.1	7.1	6.4	3.2	3.7
Total ^{2/}			10,187	12,690	15,820	15,368	15,701			100.0	100.0	100.0	100.0	100.0

^{1/} W.I. figures do not include visitors from St. Lucia or Grenada.

^{2/} In-transits excluded.

Table 2.84

ST. VINCENT - Average Length of Stay of Air Arrivals by Country of Origin^{1/}

Country of Origin	1970				1971				1972				1973
	Jan-Mar	Apr-June	July-Sept	Oct-Dec	Jan-Mar	Apr-June	July-Sept	Oct-Dec	Jan-Mar	Apr-June	July-Sept	Oct-Dec	Jan-Mar
USA	7.8	7.2	10.1	8.5	8.5	8.3	10.1	9.8	7.8	9.1	10.5		8.3
CANADA	7.4	9.1	10.5	10.4	9.7	8.3	12.2	11.7	8.1	9.8	11.7		9.3
UK	7.6	6.2	8.0	6.5	8.9	8.1	10.1	9.5	9.8	7.8	11.7		10.4
WEST INDIES	7.0	7.4	9.5	7.5	6.5	6.0	7.7	7.7	6.5	6.5	8.3		5.8
OTHER	7.0	6.1	8.5	7.7	6.8	6.2	8.9	8.1	7.6	5.4	9.8		6.2
TOTAL	7.5	7.3	9.3	8.0	8.1	7.1	8.5	9.1	7.5	7.6	9.2		8.0

^{1/} Country of origin is defined as nationality of the visitor.

Table 2.85
ST. VINCENT - Visitors by Type of Accommodation

	1970				1971				1972				1973
	Jan - March	April - June	July - Sept	Oct - Dec	Jan - March	April - June	July - Sept	Oct - Dec	Jan - March	April - June	July - Sept	Oct - Dec	Jan - March
Hotels and Guest Houses	3,397	2,007	1,647	1,629	2,825	1,824	1,622	1,642	2,396	2,118	1,913		3,339
% of Total	68.7	57.7	39.9	49.8	58.3	54.3	40.2	52.6	57.5	55.4	45.8		67.6
Cottages, appartments, private homes	977	1,170	2,330	1,453	1,387	1,204	2,300	1,216	1,066	1,268	2,101		853
% of Total	19.8	33.6	56.5	44.4	28.6	35.8	57.0	38.9	25.6	33.2	50.2		17.3
Yachts	567	302	150	191	637	334	113	264	706	436	167		745
% of Total	11.5	8.7	3.6	5.8	13.1	9.9	2.8	8.5	16.9	11.4	4.0		15.1
TOTAL	4,941	3,479	4,127	3,273	4,849	3,362	4,035	3,122	4,168	3,822	4,181	3,530^{1/}	4,937

^{1/} Estimate.

Source: Tourist Board.

Table 2.86

ST. VINCENT - Visitor Arrivals and Mode of Transport

	1960	1965	1968	1969	1970	1971	1972
Air			10,187	12,690	15,820	15,368	15,701
% of stop-over visitors			81.7	81.5	90.0	88.3	92.9
Sea			2,285	2,879	1,767	2,039	1,201
% of stop-over visitors			18.3	18.5	10.0	11.7	7.1
Sub- Total stop-over visitors			12,472	15,569	17,586	17,407	16,902
Cruise ship passengers			18,823	14,323	16,094	12,327	11,418
% of grand total			51.1	39.2	41.5	35.3	34.9
Yachts			1,244	2,196	2,058	1,729	1,693
% of grand total			3.4	6.0	5.3	4.9	5.2
Federal Boats			3,556	3,793	2,402	2,981	2,109
% of grand total			9.6	10.4	6.2	8.5	6.4
Other Boats			775	646	611	514	622
% of grand total			2.1	1.8	1.6	1.5	1.9
Subtotal (In-transits)			24,398	20,958	21,165	17,551	15,842
Grand total			36,870	36,527	38,751	34,958	32,744

TRINIDAD AND TOBAGO

Statistics

Data originate from the Central Statistical Office and Tourist Board.

Annual and Monthly Visitor Arrivals

In 1972 there were some 115,000 stopover visitors, compared with 48,000 in 1960 (Table 2.88). The annual average growth rate in the intervening years was 7.5%, which is modest compared with some other islands.

The relationship between holiday and business visitors remained fairly stable between 1960 and 1972, with holiday visitors accounting for about 80% of the total.

Total Visitor Arrivals by Country of Origin

Visitor arrivals by country of residence are shown in Table 2.87. Residents of the U.S.A. and Canada represented about 40% of the total between 1968 and 1971. European visitors form a significant proportion of stopover visitors (12% in most years) and West Indians increased from 20% in 1968 to 25% in 1971.

Transport Mode

There are no statistics describing transport mode of stopover visitors, but "temporary-halt" visitors, most likely cruise and other ships' passengers, comprised about 47% of the total in 1960, falling to 31% in 1972.

Table 2.87

TRINIDAD AND TOBAGO - Visitor Arrivals and Country of Origin^{1/}

	1960	1965	Numbers of visitors					% distribution of visitors				
			1968	1969 ^{1/}	1970	1971	1972	'60	'65	'68	'69	'70
United States			37,660	37,570	37,240	41,530			32.6	31.4	31.8	29.8
Canada			11,560	10,940	8,830	12,870			9.8	9.2	7.5	9.2
United Kingdom			9,400	9,610	9,990	11,190			8.1	8.1	8.5	8.0
Rest of Europe			4,090	4,280	5,340	6,290			3.5	3.6	4.6	4.5
Central America			5,560	5,490	5,470	7,170			4.8	4.6	4.7	5.1
South America			22,210	23,010	22,560	24,320			19.2	19.3	19.3	17.4
Other Caribbean countries			22,710	25,450	25,220	34,590			19.6	21.4	21.6	24.8
Rest of World			2,780	2,850	2,350	1,680			2.4	2.4	2.0	1.2
Stopover Total			115,770	119,200 ^{2/}	117,000	139,640			100.0	100.0	100.0	100.0
Temporary halt passengers (air and sea)			142,000	166,180	166,560	166,740						
GRAND TOTAL			257,860	285,380	283,560	306,380						
Temporary Halt as % of Grand Total			55.1	58.2	58.7	54.4						

^{1/} Includes in-transit passengers.^{2/} Discrepancy in total.

Source: Tourist Board

Table 2.22

TRINIDAD AND TOBAGO - Annual Visitor Arrivals by Purpose of Visit

	1960	1965	1968	1969	1970	1971	1972
Stop-over visitors (1)	40,218	46,930	77,350	76,020	71,940	90,780	94,490
%	83.3	81.0	84.4	80.4	74.3	81.5	82.5
Stop-over visitors (2) (- business)	8,078	10,990	14,310	18,490	14,950	20,550	20,060
%	16.7	19.0	15.6	19.6	25.7	18.5	17.5
SUBTOTAL STOP-OVER	48,296	57,920	91,660	94,510	86,890	111,330	114,550
In-transit and changing ship or plane	23,395	21,390	24,110	22,550	30,110	28,310	35,500
Temporary halt (ship)	66,083	-	-	-	-	79,890	66,390
% of Total	47.3	-	-	-	-	36.4	30.7
TOTAL	137,774	-	-	-	-	219,530	216,440

TURKS AND CAICOS ISLANDS

Statistics

The Immigration Department's figures were obtained from E/D cards, which are similar in format to the standard international card.

Although these islands attract few visitors the statistics may be inaccurate due to the miscounting of persons arriving by private plane, who form an important component in the islands' total.

Annual and Monthly Visitor Arrivals

Turks and Caicos Islands have fewer annual visitors than any other Caribbean territory. However, visitor arrivals have increased annually since 1969, the 4,670 visitors in 1972 constituting a 70% increase over 1971. There are three principal airstrips in the island group. In 1972, half the visitors entered through South Caicos, where there are fuelling facilities for small aircraft; 27% entered through Providenciales, and 23% through Grand Turk, the administrative and commercial centre. Hoteliers comment that it is unrealistic to consider a "tourist season," because annual arrivals are so few. However, the monthly distribution figures for visitors in 1972 show typical seasonal fluctuations (Table 2.89).

Total Visitor Arrivals by Country of Origin

The nationality figures (Table 2.90) indicate that a large proportion of visitors (approximately two thirds) is from the U.S.A. British visitors comprise 4% to 9% of the total and probably consist entirely of relatives and friends of residents, and business/official visitors. The category "other" may contain a large proportion of Bahamians also visiting relatives and friends.

Average Length of Stay

Hoteliers on Grand Turk and the Tourist Board estimate that visitors remain four or five days on average. Private plane fliers who may stay overnight only, are estimated to constitute 85% of guests at the only hotel on South Caicos. Visitors to the hotel on Providenciales generally stay one week. The predominantly government or business visitors to Grand Turk stay for a short time compared with tourists, although the infrequency of commercial flights to and from the island renders very short visits difficult.

Table 2.89

TURKS & CAICOS ISLANDS - Total Visitor Arrivals by Month and Port of Entry - 1972

	Grand Turk	South Caicos	Providenciales	TOTAL
January	50	186	75	311
February	65	200	181	446
March	94	189	164	447
April	89	169	123	381
May	97	170	121	388
June	129	189	87	405
July	109	231	115	455
August	57	198	92	347
September	56	153	58	267
October	72	166	55	293
November	77	192	73	342
December	<u>104</u>	<u>270</u>	<u>107</u>	<u>481</u>
TOTAL	999	2313	1251	4563

NOTE: Slight discrepancy between Tourist Board's and Immigration Department's figures for annual total.

Source: Immigration Department.

Table 2.90

TURKS & CAICOS ISLANDS - Visitor Arrivals and Country of Origin

	Numbers of visitors				% distribution of visitors			
	1969	1970	1971	1972	'69	'70	'71	'72
United States	1098	1216	1490	3202	63.1	58.5	54.4	68.6
Canada	49	67	132	161	2.8	3.2	4.8	3.4
United Kingdom	86	142	249	205	5.0	6.8	9.1	4.4
Rest of Europe	37	34	75	69	2.1	1.6	2.7	1.5
Other countries	469	621	796	1033	27.0	29.9	29.0	22.1
Total	1739	2080	2742	4670	100	100	100	100

Source: Tourist Board.

Table 2.91

TURKS & CAICOS ISLANDS - Visitor Arrivals and Mode of Transport

	1969	1970	1971	1972
Air	1726	2066	2482	4390
% of stop-over visitors	99.3	99.3	90.5	94.0
Sea	13	14	260	280
% of stop-over visitors	0.7	0.7	9.5	6.0
Total stop-over visitors	1739	2080	2742	4670
Cruise ship passengers	NIL	NIL	NIL	NIL
% of grand total				
Grand total	1739	2080	2742	4670

Source: Tourist Board

U.S. VIRGIN ISLANDS

Statistics

Visitor statistics were collected from the Division of Trade and Industry, U.S. Department of Commerce. The information is sketchy, mainly because visitors from the U.S.A. and Puerto Rico are not required to fill out E/D forms.

Annual and Monthly Visitor Arrivals

There are no statistics relating to stopover visitors; no distinction is made in the passenger arrival figures (Table 2.92) between visitors and returning residents.

In 1972, the Department of Commerce conducted a survey of winter visitors arriving by air from North America (Table 2.93). The survey covered 6.8% of all arriving passengers and indicated that 13% of visitors came on business, 61% for vacation and 17% for shopping.

Visitor Arrivals by Country of Origin

The 1972 survey also analyzed visitor arrivals by origin, the results of which revealed a pattern similar to that observed in other Caribbean resort areas. An estimated 54% of visitors came from the north east of the U.S.A. and 12.5% from the Middle Atlantic States. A relatively small percentage (7.4%) came from the neighbouring island of Puerto Rico.

Average Length of Stay

A 1% sample survey of visitors carried out by the Government in 1964/65 indicated an average stay of 3.5 days at that time. The airlines estimate that 80% of travellers from Puerto Rico stay less than 24 hours in the Virgin Islands.

Transport Mode

A significant proportion of visitors to the U.S. Virgin Islands probably come by sea, as Puerto Rico and the British Virgin Islands are quite close and sailing, boating and fishing are popular in this part of the Caribbean.

In 1970/71, 13% of all arrivals excluding cruise ship passengers came by sea, compared with 12% in 1971/72. Some 20,000 visitors arrive each year aboard air boats, in addition to ferries and yachts.

Table 2.92

U.S. VIRGIN ISLANDS - Total Visitor Arrivals by Island and Mode of Transport

	Fiscal Year	
	1970 - 71	1971 - 72
<u>St Thomas</u>		
Air	425,681	499,783
Cruise	237,863	354,011
Yacht passengers	-	4,000
Carib Star passengers (from Puerto Rico)	29,835	23,983
Antilles air boats	18,558	20,219
Navy personnel	42,443	38,533
Bomba Charger (from Tortola)	-	30,697
Comet (from Puerto Rico and Tortola)	-	4,499
TOTAL	754,380	975,725
<hr/>		
<u>St Croix</u>		
Air	231,377	243,067
Cruise	16,010	10,634
Yacht passengers	-	-
Carib Star	-	-
Antilles air boats	11,093	11,405
Navy personnel	32,585	13,915
TOTAL	291,065	279,121

	Fiscal Year	
	1970 - 71	1971 - 72
Air	657,058	742,850
Cruise	253,873	364,645
Yacht passengers	-	4,100
Carib Star	29,835	23,983
Antilles air boats	29,651	31,624
Navy personnel	75,028	52,448
Bomba Charger	-	30,697
Comet	-	4,499
TOTAL	1,045,445	1,254,846

NOTE: Includes residents and immigrants as well as visitors to U.S. Virgin Islands.

Source: Department of Commerce, Division of Trade and Industry

Table 2.93

U.S. VIRGIN ISLANDS - 1972 Winter Survey of
Air Arrivals from North America

By Region:

<u>U.S.A.</u>	<u>1972</u>
North east	54.1
Middle Atlantic	12.5
South	9.6
Mid west	9.6
West (including Alaska and Hawaii)	6.4
<u>Canada</u>	0.4
<u>Puerto Rico</u>	<u>7.4</u>
TOTAL	<u>100.0</u>

By Purpose of Visit:

Vacation	61.0
Shopping	17.4
Honeymoon	3.4
Business	13.3
Government	0.3
Other	<u>4.6</u>
TOTAL	<u>100.0</u>

Source: U.S. Department of Commerce: 1972 sample survey
of 6.8% of all air arrivals.

Table 2.94

U.S. VIRGIN ISLANDS - Annual Cruise Ship Arrivals

	Fiscal Years						
	1959 - 60	1964 - 65	1967 - 68	1968 - 69	1969 - 70	1970 - 71	1971 - 72
St. Thomas and St. John	49,000	103,533	149,599	195,153	230,300	237,863	354,011
St. Croix	700	5,808	16,518	18,388	20,784	16,010	10,634
TOTAL	49,700	109,341	166,117	213,541	251,084	253,873	364,645

PART II: THE INDIVIDUAL ISLANDS

CHAPTER 3. TOURISM DEVELOPMENT PROJECTS UNDER CONSIDERATION AND UNDER

CONSIDERATION IN 1973

ANTIGUA

Under Construction

Information was obtained from the Ministry of Trade, Tourism and Industry.

A number of projects underway in Antigua will add some 466 rooms to the accommodation supply. Accommodation under construction is equivalent to 37% of the existing stock.

Three of the hotel projects are extensions to existing hotels. The former CBC Hotel has been taken over by Halcyon, which is adding 72 rooms and renovating the older 32 rooms. Curtain Bluff Hotel is presently adding 10 rooms and Half Moon Bay 44. Half Moon Bay Hotel is also constructing 44 rooms in condominium units. The only new hotel underway is at Brown Bay where 300 rooms will be built.

Under Consideration

There are a number of large projects under consideration in Antigua. The scale of two of these is so great that it is difficult to believe they will be implemented, although both are backed by a consortium of interests and by the Government.

The most ambitious would provide 16,000 bed spaces in a "tourist town" at Five Islands on the west side of Antigua. An Antiguan family will invest 1,600 acres as equity and the scheme will be backed by a consortium of German financiers, bankers, hoteliers, tour operators and other agents concerned with tourism. The concept is to provide a mixed development of cottages and five hotels, with all supporting facilities and a lagoon to be built over ten years. Some preliminary development plans have been drawn up and environmental design standards considered. Investment has been estimated at \$40 million and construction was expected to begin in summer 1973. Five Islands would be promoted as a package holiday resort for Europeans, principally for Germans. Some Antiguan students are already in Germany for training in all aspects of hotel operation and to learn the language.

The Coconut Hall development on the east coast is also due to start in 1973. This is a large scheme with German developers. Capital has been raised through a Canadian bank. The Antiguan Government owns some shares and has contributed land. The concept is for a 320 room golf-course hotel with two blocks of condominium units.

The Antiguan Government has recently made an agreement with the prospective developer of the Long Island project for a \$4.5 million investment in a resort complex, to include the construction of 100 rooms a year for the next ten years. The size of the project and a history of delays, raise doubts about the probability of implementation in the near future.

There are two projected tourism developments in Antigua backed by British investment. A tennis centre, with an unspecified number of condominium units and hotel rooms was planned to commence construction at Nonesuch Harbour in 1973. This was delayed until January 1974. A starting date has not yet been fixed for the other scheme, a proposed 200 room hotel at Laurie Bay. Some high-cost housing may also be added here.

The Antiguan Government plans to build a Marina and 300 condominium units along the north-east coast between the Antigua Beach Hotel, which is Government owned, and the Jaberwock Hotel, which is cooperating in this scheme. Construction was scheduled to begin in 1973 or the first half of 1974.

Two other proposals about which the Ministry of Trade has information are "Yeptons" and "Dockyards", with 300 and 50 bedspaces each.

Projects under consideration, excluding one for which no size estimates have been made, could add more than 11,000 rooms to the existing 1,256. This may be compared with supply in Puerto Rico where there were 12,500 rooms in 1972.

The Antiguan Government accepts shares in tourism projects and puts in land as equity, in order to gain representation on boards, and to understand and affect policy. Some of the schemes are of a magnitude never before attempted in the Caribbean, or probably anywhere else in the world. For example, the Long Island and Five Islands projects individually include more rooms than Bermuda as a whole has built in more than twenty years of tourism expansion. The Government considers that since the promoters are experienced hoteliers, tour operators and financiers, they are unlikely to invest unwisely and will have more to lose than Antigua. However, initially there could be strains on the construction industry and demands for labor (especially skilled labor) from outside Antigua, followed by a shortage of tourism service workers, which the small-scale training schemes now starting in Germany could only partly satisfy.

THE BAHAMAS

Under Construction

Information about facilities under construction or planned is incomplete.

There are 550 rooms in tourist accommodation that did not feature in the 1972 rates sheets and for which applications were received under the Hotel Licensing Act. All of them opened in the first half of 1973. The new hotels were the South Ocean, Nassau (120 rooms), the Blair Hotel, Freeport (64 rooms) and Norman's Cay Club, Exuma (10 rooms). Gregory Town Guest House, Charley's Haven Guest House and Happy People Marina provided 16 rooms altogether. Extension to existing hotels at Great Harbor Club and Club Cay contributed an additional 58 rooms. Cape Eleuthera club opened with 103 villas and Pieces of Eight, Exuma with 32 apartments.

Under Consideration

Applications for licenses received for future tourism projects provide for an additional 334 rooms at Grand Bahama and for 21 rooms at the Sir Charles Hotel. Both were expected to open in 1973.

The Planning Department is presently considering applications for construction of a 400 room condominium hotel on Abaco.

BARBADOS

Under Construction

The Barbados Town and Country Planning Department provided estimates of beds under construction from planning applications.

There are 200 beds under construction and, following the Condominium Law, 150 condominium units have been started. Rooms under construction will make a modest 5% increase in existing accommodation.

The condominiums are included in three schemes. Banyons condominiums contain 74 units to be built in three phases. Seventeen units were recently completed, 26 more were due to open in March 1974 and the remainder at the end of 1974. The 120 units at Sunset Crest apartments have already been completed and sold, and rental was to begin in December 1973. The third block, at St. Peters, consists of 44 two-bedroomed units which was also available for occupancy in 1973.

Under Consideration

Tourist accommodation under serious consideration was interpreted as projects having planning approval, which the Town and Country Planning Department thinks are likely to be implemented. In recent years, many large tourist complexes have not materialized. The construction boom that Barbados experienced throughout the 1960s levelled off in the 1970s. Recent hotel building has consisted of additions to or conversion of old property, undertakings requiring minimal capital outlay.

There were 1,750 hotel and 1,000 apartment beds under serious consideration in 1973. The hotel proposed for the south coast would account for 40% of the projected hotel beds. Holiday Inn has expressed interest in a neighbouring site and, together with the new Arawak Inn, these hotels will form the nucleus of the new resort area. The Government has plans for five hotels on an inland site in southern Barbados. The site was designated for hotel development five years ago and remains undeveloped. Opposition to this development is based on its location in the flightpath of the runway at Seawell Airport and its distance from the sea. A recent survey has demonstrated that tourists to Barbados spent 85% of their leisure time on the beach, so a beach location seems to be critical for a successful hotel development.

The Town and Country Planning Department favours concentration of tourism facilities along the south and west coasts so the wild Atlantic Coast in the east will retain its unspoilt environment. Nevertheless, planning approval was granted two years ago for a \$40 million complex in the vicinity of Bath. No development has yet taken place.

BERMUDA

Under Construction

Relevant information was collected from the Tourist Board.

Beds classified as "under construction" amount to 400, and will increase existing accommodation by 9%. All 400 are additions to the Southampton Princess: building operations are complete, but the new rooms were not to open until 1974.

The tourist industry has been under Government control since 1962 and the number of beds at the planning and construction stage reflect Government policies rather than demand pressures. In 1962, when planning applications for the Southampton Princess Hotel were received, the Bermuda Executive Council decided to phase new hotel construction so that the capacity of the local construction industry, especially the capacity of the labor force, was not overreached, because of unwillingness to admit additional immigrant workers. The Southampton Princess owners were allowed to purchase property, but were forbidden to open a hotel before January 1969. Further controls were introduced by the Government in 1968, allowing the addition of only 500-700 rooms a year. These additions were related to past growth trends in hotel construction, viable size of a new hotel and the environmental capacity of Bermuda to receive more tourists, as well as to the capacity of the construction industry.

In August 1971, the Bermuda Executive Council imposed a ban on all building or conversion of additional hotel, guest house, cottage colony or tourist apartment accommodation until 1975, except for certain improvement schemes. Consideration would be given to small guest houses and cottage colonies, the expansion of which was necessary to maintain economic viability. All new operations, even if committed, would be discouraged and operators would be asked to provide accommodation for up to 30% of staff where appropriate.

In March 1973, the restrictions were further enforced when a freeze on construction of resort accommodation was introduced. The only additions to accommodation permitted under this edict are the 200 room second stage of the Southampton Princess already complete and due to open in January 1974 and another 200 rooms already approved. No other construction will be sanctioned until 1978 "unless conditions dictate otherwise". The freeze means the postponement of three major hotel projects.

Reasons cited for the latest freeze include trends in visitor arrivals as well as the capacity of the labor force and the physical environment of Bermuda. Growth in visitor demand, which was never a problem in the 1960s, is now an issue in management of the tourism industry. In a March 1973 press release the Executive Council spokesman pointed out that while arrivals continued to grow, average length of stay had fallen to such an extent that hotel occupancy rates were reduced. The objective in 1973 was to increase the number of visitors so that total guestnights reached the level of the previous three years.

BRITISH VIRGIN ISLANDS

Under Construction

The UNDP physical planner provided information on projects under construction or at the planning stage.

The 60 rooms in self-catering units currently under construction will increase existing accommodation by 6%. The Biras Creek Hotel with 16 rooms, which was to commence operation in October 1973, has been included in estimates of existing accommodation for 1973.

The largest scheme under construction is a development of 20 housing lots on Great Camanoe Island. Five condominium units are being built at Nanny Cay, Tortola in the first phase of a 40 unit project. Similarly, five houses are under construction at Sandy Estates, Jos Van Dyke Island, where 17 houses are planned.

Under Consideration

Tourist accommodation under serious consideration was defined as projects approved by the Land Development Control Authority, and which have been observed by the Town Planner to be making progress. Many schemes for tourism development in the British Virgin Islands are never implemented, and the Town Planner is rightly conservative in his estimate.

A total of 382 rooms is under serious consideration. This includes a proposed 16 room hotel on Virgin Gorda, a cottage/apartment block at Slaney Park Reef (45 houses, 20 apartments), an additional condominium at Treasure Isle Hotel, cottages at Little Apple Bay, condominiums in Leverick Bay, Virgin Gorda and houses on Reef Island and Great Camanoe.

Another 510 rooms were judged to be under less serious consideration. Quantity surveyors in Tortola are making feasibility studies for the establishment of an 80 to 100 room Holiday Inn. A planning application has not yet been submitted and because the chain is reported to be experiencing operating problems with other small hotels in the Caribbean, Holiday Inn plans to increase the size of the hotel from 125 to 175 rooms. The Reef Island Estate Development Plan includes a small hotel, programmed to begin after the completion of the Biras Creek hotel. The remaining 400 rooms, under less serious consideration, consist of numerous apartment and cottage projects, for which planning applications have been submitted.

CAYMAN ISLANDS

Under Construction

The Tourist Board supplied figures for hotels under construction and the Planning Office added information about development proposals. Three projects were under construction; these are expected to add 133 rooms or 19% of the existing stock. Two hotels are extending their premises: Holiday Inn is building 58 more rooms and Harbor Heights, 15 more. An apartment building with 25 two- and three-bedroom units is also underway.

Under Consideration

Two projects have reached an advanced planning stage and are regarded as serious propositions. The first is a twelve-room extension to the Coral Caymanian hotel and the second fifty-eight two-bedroom apartments. Together they will provide an additional 128 visitor rooms. A proposal for construction of another 230 rooms was considered to be less serious, as was a six-room expansion to an existing hotel. Another proposal for a new 20-30 room hotel, although it had received planning approval in principle, seemed unlikely to be implemented.

A hotel group expressed interest in building a 200 room hotel, starting in early 1974. However, the Tourist Board has argued against the project, stating that sufficient employment exists in the financial, service and tourism industries. Further construction of tourism facilities would necessitate immigration, with its accompanying social problems, as well as require additional housing and community services that would not directly benefit the Cayman Islanders. Hence, there is a strong possibility that a freeze on tourism development, as in Bermuda will be introduced in the near future.

DOMINICA

Under Construction

The Dominica Central Housing and Planning Authority reports 15 rooms under construction, equal to 6% of existing stock. Castaways Hotel, which had recently started to receive Club Caribee guests, was adding eight rooms. Construction of two cottages and additional rooms by the owner of Castle Comfort guest house will provide seven more rooms.

Under Consideration

The Authority states that no hotel schemes have been approved, so planned projects may not eventuate. These schemes could provide an additional 330 hotel rooms, besides which houses and cottages may be built on partially completed subdivisions. An estimated 400 cottages and houses for rent are likely to be made available to tourists in the short-term. A tourism complex in Cabrits, Portsmouth, consisting of one 200 bed hotel and two linked 200 bed hotels was recommended by Shankland Cox in its Tourism Development Strategy report and implementation of the complex is now being negotiated. The Development and Planning Corporation would own the linked hotel, with the Government retaining a small equity share.

A potential source of accommodation exists on four large subdivisions that include some 1,800 lots. Emerald Hillside, which is British owned, contains 150 lots, of which 20 to 25 have been developed. Two houses on this estate are now being advertised for rent by the Tourist Board. Two developments consisting of 1,000 and 245 lots are being sold mainly in Sweden. In the former, about 20 houses have been built in the first eight years, so that development has been slow. Several houses have been built in the smaller subdivision and about 24 retired Europeans already live there.

A tourism development with 350 two- and three-bedroom cottages and golf and yachting facilities has been planned by a locally owned organization recently given planning approval for a subdivision. Architectural drawings are being prepared and the company intends to design and build the cottages which could provide 900 bedrooms in the future. It is difficult to estimate what proportion of housing built on the other subdivisions will become tourist accommodation and at what rate construction will proceed. An arbitrary estimate of 50 houses and 100 rooms has been made; thus the total of self-catering tourist accommodation at the planning stage is 1,000 rooms.

DOMINICAN REPUBLIC

Under Construction

Information was received from INFRATUR and Shankland Cox studies, in particular from a hotel survey conducted in October and November 1972.

The 678 rooms under construction in the Dominican Republic would add 38% to the tourist accommodation existing in 1973. Some 279 rooms were to be completed by the end of 1973 and 399 by the end of 1974. Of these, 188 rooms were in commercial hotels, 282 in commercial/tourist hotels and 856 in tourist hotels.

Under Consideration

The World Bank recently approved a loan of \$21 million to help finance a project for the development of tourism at Playa Dorada and Playa Grande on the north coast of the Dominican Republic.

GRENADA

Under Construction

Information was obtained from the Ministry of Housing.

In 1973 150 rooms were under construction in Grenada, which was to increase tourism supply facilities by 16%. Extensions to Secret Harbour Hotel and Ross Point Inn added eleven new rooms and South Winds is expanding its cottage facilities by four rooms. The major projects underway were villa developments at Cinnamon Hill, where 60 rooms were being built and Quarantine Station, where 75 rooms were under construction.

Under Consideration

No applications had been received in 1973 for hotel construction. Activity on subdivisions cannot be predicted in a quantitative manner.

Negotiations were underway for expansion of the True Blue Motel. The magnitude of the project had not been determined.

A number of policy objectives concerning tourism development could be important, particularly after independence in 1974. The island then hopes to attract investment from South America and continental Europe.

The Government has zoned land for 1,000 bedspaces. Grand Anse, the only white sand beach on the island, is becoming saturated with tourist accommodation and the Government is anxious to encourage construction on inland sites, particularly beside the Grand Etang lake. When the airport facilities have been expanded and the south coast road built the Government believes that there could be a demand for additional facilities, possibly a 150 room hotel on Grand Anse beach and a 200 room City Hotel for business visitors. There is a desire to maintain a tourism industry based on small, intimate, high quality hotels that are acceptable to European and American visitors and a realization that Grenada must attempt to keep down its comparatively high hotel rates.

JAMAICA

Under Construction

The Tourist Board reported 4,280 hotel beds under construction in 1973, which was to increase accommodation by nearly one third. No information is available about additions to guest house, apartment and cottage accommodation.

Under Consideration

Construction of another 2,948 hotel beds is under serious consideration.

Table 3.1 indicates the anticipated growth pattern up to 1977, when the total number of hotel rooms is forecast to be 82% more than in 1972. Kingston/St. Andrew would experience the greatest proportional increase, equivalent to 138% between 1972 and 1977. Montego Bay, with an additional 1,800 rooms, is expected to receive the greatest numerical increase in accommodation. No expansion is anticipated in the Port Antonio area. Generally, expansion is expected to continue each year until 1975, after which it could level off. The average hotel size in Jamaica is expected to rise from 62 rooms in 1972 to 96 in 1977. The most striking change will be in new resort areas, where one or two large hotels could completely alter the character of tourist accommodation.

Table 3.1

JAMAICA - Major Projects Under Discussion 1973 - 1977

	Total	King- ston	Montego Bay	Ocho Rios	Port Antonio	Others	Total	King- ston	Montego Bay	Ocho Rios	Port Antonio	Others
	Number of Hotels						Number of Rooms					
1972	106	20	50	24	6	6	6,536	1,029	3,007	2,086	235	181
1973	109	24	47	26	7	5	7,328	1,677	2,959	2,240	278	174
1974	114	25	49	28	7	5	8,609	1,695	3,822	2,640	278	174
1975	118	26	50	29	7	6	10,209	2,085	4,322	3,000	278	524
1976	121	26	51	29	7	7	11,269	2,445	4,822	3,000	278	724
1977	124	27	51	30	7	9	11,869	2,445	4,822	3,200	278	1,124
	Annual additions to hotels						Annual additions to rooms					
1972-3	3	4	-3	2	1	-1	792	648	-48	154	43	-7
1973-4	5	1	2	2	0	0	1,281	18	863	400	0	0
1974-5	4	1	1	1	0	1	1,600	390	500	360	0	350
1975-6	3	0	1	0	0	1	1,060	360	500	0	0	200
1976-7	3	1	0	1	0	2	600	0	0	200	0	400
	Average size of hotel (no. of rooms)											
1972	62	51	60	87	39	30						
1977	96	91	95	107	40	200						

MONTSERRAT

Under Construction

The Town and County Planning Department indicated that Montserrat has no tourist accommodation under construction nor are any projects at the firm planning stage.

Under Consideration

Three projects were being discussed. The largest is a 75 bed health resort and hotel, for which no planning application had then been submitted. Approval was granted for construction of a guest house in 1970, but no action was taken. Provisional approval was given in January 1972 for a 10 to 20 room hotel, but no further work had been done.

Future growth of villa and cottage accommodation cannot be quantified.

PUERTO RICO

Under Construction

Economic Associates provided information on hotels under construction or in the pipeline.

Three new hotels were under construction in 1973 and two were being extended. These will provide 1,452 rooms, increasing the 1972 total by 8%. The new hotels would contain 90, 180 and 612 rooms respectively. El San Juan Hotel is adding 350 rooms, and Condado Beach/Hyatt is building 220 rooms and a new convention complex. Condominia independent of hotels continue to be built, but no estimates can be made of the number likely to become available to tourists.

Under Consideration

Projects under serious consideration, or those that have reached a firm planning stage, could contribute 2,150 rooms, of which 2,000 are planned for three condominium hotels and 150 in a conventional hotel.

Other projects, now at a less advanced stage, could add 1,500 rooms.

ST. KITTS/NEVIS/ANGUILLA

Under Construction

The Ministry of Trade, Development and Tourism, the Frigate Bay Development Corporation and hotel managers contributed information about the number of beds under construction and planned.

Growth in tourist accommodation in these islands has been characterized by the conversion of old buildings, particularly plantation houses, and small extensions to existing hotels. At present there are no new hotels under construction and extensions probably represent only ten additional rooms. Some 40 houses are being built at Frigate Bay. Assuming 50% will be available for tourists, total rooms under construction will increase existing accommodation by 10%.

Under Consideration

Approximately 270 rooms are planned in St. Kitts/Nevis/Anguilla. The growth will come from expansion equal to 12 rooms at the Ocean Terrace Inn and Nisbitts Plantation, and a development at Frigate Bay.

The Frigate Bay Development plan is a large tourism development scheme, initially conceived about four years ago. The rationale for planning large-scale facilities is the expansion of the airport to international standards. Frigate Bay is quite close to the Golden Rock airfield. There will be nine hotel sites, a substantial amount of residential and villa development (650 lots) and a marina on 850 acres at the southern end of St. Kitts. The focus of the development would be a golf course suitable for international championship competitions. This concept represents a departure from previous tourist development in St. Kitts/Nevis/Anguilla.

Progress at Frigate Bay has been slow. Water, power and roads have been installed, but the 1970 target of "400 first class rooms by 1972" has not been achieved. Revised plans called for completion of the 18 hole golf course by November 1974. Construction on the first phase of a hotel has started and a second hotel with 150 rooms should be open when the golf course is completed. The hotels are being constructed by an English company and have been mainly financed by the Government.

After 150 residential lots were sold, sales were discontinued until construction of residences begins on several lots. About 50% of sales were to local residents and 50% to foreigners. To estimate how much accommodation was at the serious planning stage, it was assumed that housing built by foreigners, i.e. 75 houses, was potential tourist accommodation. The construction firm has purchased ten acres of land and submitted plans to build 38 houses, three of which are completed. If 75% are purchased by foreigners, 30 could become tourist accommodation. This would provide a total of 105 houses or 210 rooms as prospective tourist accommodation in villas.

Another 350 hotel rooms and 400 condominiums (800 rooms) at Frigate Bay are also considered to be at the preliminary planning stage. Two groups of developers, from Puerto Rico and Hawaii, were negotiating to construct 300 to 500 condominium units. The golf course hotel will be expanded to 100 rooms in its second phase, and the developers are interested in building a 100 room hotel on the Fort Tyson site. Finally, a consortium of local businessmen is planning to build a 30 room hotel at lower Fort Tyson, with expansion to 100 rooms at a later date.

Other long-term plans for expanding tourist accommodation consist of 7 more rooms at Ocean Terrace Inn, 90 at Old Manor, 80 at Pinney's Beach Hotel and 64 at Holiday Inn. These, in addition to the 500 hotel, 800 condominium, and 500 villa rooms at Frigate Bay, total 2,041 rooms at the less serious consideration stage.

Some 2,000 rooms in tourist accommodation are either under construction or being planned for this island group compared with only 479 rooms in existing accommodation.

ST. LUCIA

Members of the UNDP Physical planning team, Town and County Planning Authority, and National Development Corporation assisted in compilation of this material.

The amount of tourist accommodation in St. Lucia will not increase markedly in the immediate future. Five years of active construction seemed likely to slacken after September 1973 when the Cariblue Hotel opened with 102 rooms.

Under Construction

Two small apartment blocks were under construction in 1973: Souffriere Condominia and Cas-en-Bas Apartments, which were to provide an additional 20 units (40 rooms).

Under Consideration

There are no firm commitments for tourism projects in St. Lucia. However, future construction of some 475 rooms in hotels and apartments is being negotiated. A proposal exists for a 300 room hotel on land that must be re-zoned for hotel development, before construction can begin, hopefully in June 1974. The Halcyon Days hotel was planning an expansion to 750 beds, i.e. an addition of 250 beds and 125 rooms. The Halcyon Beach Hotel hoped to add 24 apartments at some future time.

The two largest development schemes are Rodney Bay and Vieux Fort.

The Rodney Bay project was initiated because insect nuisance in that area necessitated elimination of the swamp. A resort area was planned for the reclaimed land and the Holiday Inn Hotel was built. Physical layout plans have changed frequently since the outset. However, space availabilities are considered appropriate for five or six hotels, providing 3,000-4,000 hotel beds, in addition to a marina and some residential development. The last is an attempt to achieve integration of tourists and local residents, although no low cost housing is planned. Sales have proceeded slowly on the 620 acres allocated for residential development; more interest has been shown in smaller lots suitable for middle-cost housing and the local house-buyer than in larger lots. The venture is owned jointly by CDC and the Government.

The land at Vieux Fort is owned and managed by the St. Lucia Development Corporation. The Corporation is more directly concerned with promoting industrial development and housing than tourism. There are 400 lots, mainly large, on residential subdivisions in the area.

ST. VINCENT

Under Construction

The Land Development Control Authority and Development Corporation were the chief sources of information for tourist accommodation planned or under construction.

Some 202 rooms in tourist accommodation were under construction in St. Vincent in 1973. The two largest projects are Bequia Inn with 100 rooms and Low Man's Bay with 60 rooms but in both cases work was interrupted. Three small hotels (the Valley Inn, Tony Gibbon's beach hotel and Beaufraund) and the Marcon Hill guest house were to add a total of 42 rooms.

Under Consideration

Planning permission had not been requested in the recent past in 1973 for hotels, guest houses or apartment buildings. Several developers approached the Development Corporation for assistance and the following schemes were approved. (All except the Holiday Inn are treated as proposals under less serious consideration)

Some 486 rooms were planned, of which 458 would be in hotels. Holiday Inn and the Development Corporation were jointly planning a hotel at Otley Hall which would contain 72 rooms in its first phase. A 350 room apartment hotel planned for Canouan Island was expected to begin shortly, if problems over responsibility for improving the water supply and the airstrip could be resolved. Also on Canouan Island there was a scheme for a 20 room hotel to be used initially by engineers and architects working on the larger hotel. A 16 room hotel at Big Sands Union Island awaited provision of electricity services. Finally, the Development Corporation had approved a guest house at Cavehall.

The planning authorities commented that many applications were submitted for housing with self-contained rooms, which would be appropriate for rental to tourists. Some apartment construction was planned beside the Deep Water Pier, but no application had yet been submitted. Hence, growth in apartment and villa accommodation cannot be quantified.

TRINIDAD AND TOBAGO

Under Construction

The completion of 288 tourist rooms known to be under construction were expected to add 17% to the 1972 total of hotel and guest house accommodation. The Port of Spain Holiday Inn, with 253 rooms, was expected to open towards the end of 1973 and the existing Kapok Hotel was adding 35 rooms.

No estimates are available for construction of apartments and cottages. In May 1973 no applications for guest house registration were pending with the Hotel and Restaurant Association or with the Tourist Board.

Under Consideration

A number of projects were being mooted, of which three were under serious consideration. The start of a 150 room hotel to be managed by Holiday Inn at Tyrico Bay was described as imminent. Another large hotel of 100 rooms, to be operated by Hyatt, was planned for Maracas. A third project would renovate Queen's Beach apartments and build 24 hotel rooms.

Other projects under less serious consideration included a site at Rocky Point, Tobago, in which several large chain hotels had expressed interest. A number of projects were postponed: Damian Hilltop Hotel (74 rooms), Oleanas Hotel (20 rooms), Trin Beach Hotel (120 rooms), Minster Bay Hotel (100 rooms) and Tringo Hotel (61 rooms).

Some 10 acres at Milford Bay, Tobago, have been zoned for small hotel development by the Government to promote "ethnic participation in the hotel industry". Development could take the form of guest house accommodation. Allocations for infrastructure were made, but the likely number of tourist bedspaces had not been estimated.

TURKS AND CAICOS ISLANDS

Under Construction

The Chief Secretary, who was responsible for handling all development applications, provided this information.

An estimated 51 rooms of tourist accommodation were under construction, i.e. a substantial increment (64%) to the existing stock. Although the individual projects were small, their construction seemed likely to be protracted due to difficulties in transporting materials, shortage of finance and absence of demand pressures from tourist arrivals. Hence, Storm Missick's guest house (with six rooms) should be completed by 1975, a cottage colony of eight rooms on South Caicos was to be built by June 1974 and cottages with five rooms on Providenciales were to be ready by July 1974. Ten rooms being built at Pine Cay were to complete the protracted first phase of a 20 room development. More imminent projects were six rooms at Parrot Cay, which only lacked water supply; ten rooms on North Caicos (Seven Cays Development Company), and a six-room extension to the Third Turtle Inn.

In the past, the islands have received many applications for tourism development which were later abandoned. All schemes are subject to a two-year conditional purchase lease.

Under Consideration

The distinction between serious and less serious proposals was drawn by a member of the Turks and Caicos Islands Government. Of those judged to be serious projects 37 rooms would be in hotels and 8 in cottages. All planned hotel development would be in existing hotels or hotels under construction (Third Turtle Inn, Kittina, Sunset Manor, and Seven Cays Hotel).

Less serious projects could provide 170 more rooms. The most ambitious scheme, which has Government support but is dependent upon the availability of finance, is for a 50 room holiday club centre on Salt Cay. Another major project is a 48 room construction to be carried out in two phases. Extensions to Pine Cay and Parrot Cay developments are projected to add 54 rooms. There are also proposals for 12 rooms of unspecified tourist accommodation on North Caicos and 5 rooms at a fishing camp there.

Speculation in the past, withdrawal of schemes and slow progress on development projects are unlikely to change unless communications improve between all interested parties. Unreliable and costly transportation of materials is a serious deterrent to prospective developers.

U.S. VIRGIN ISLANDS

Under Construction

Information about projects under construction or in the pipeline was obtained from the St. Thomas Planning Board.

Building rates slackened since 1971. The most important project in 1973 was a 300 room convention hotel expected to be opened by Holiday Inn in March 1974. Analysis of the planning applications revealed two other large projects known to be under construction: Phase 2 of Sapphire Condominium Hotel, consisting of 200 rooms and Hull Point Condominia with 178 units. Expansion schemes in St. Thomas were to add 856 rooms.

Under Consideration

Applications received since 1969 indicated that some 3,100 rooms of tourist accommodation had been given planning approval for St. Thomas. The Planning Officer was unable to state whether projects were speculative or serious. The applications are listed in the following table.

Application Date	Project	Size
July 1972	Pillsbury Marine Commercial Co.) Boatel, shopping, bowling alley complex)	80 land units 2 bedrooms
Aug. 1971	Estate Raphune apartments	1088 apts.
Oct. 1972	Apartments (subsequent application for conversion to condominia, which has not yet been approved)	25 apts.
1969	Hotel adjacent to Bluebeards Hotel	236 rooms
1969	Compass Point; hotel/marina complex	15 rooms
Aug. 1970	Sacred Harbour, addition	30 rooms
Mar. 1970	Howard Johnson Hotel	316 rooms
1972	Limetree Hotel, condominium extension	108 units

Applications for St. Croix included a number of proposals for apartment construction, which could have been intended for residential use or for tourist accommodation. There were no data in St. Thomas referring to St. John, therefore, evaluation of the total plans for the U.S. Virgin Islands was not

PART II: THE INDIVIDUAL ISLANDS

CHAPTER 4. OCCUPANCY RATES

ANTIGUA

Neither the Tourist Board nor the Hotel Association provides occupancy rate figures. The figures in Table 4.1 were derived from Treasury statistics showing the amount of hotel occupancy tax collected each month. This tax was levied on all registered hotels at the rate of \$1 per bednight until September 1, 1968 and \$2 per bednight thereafter. Payment is sometimes late and there is no subsequent adjustment to allow for this.

Figures of bedspaces available are estimated from the Tourist Board's annual list of rooms available in registered hotels. To determine available beds the number of rooms was doubled and multiplied by the number of days in each month. Clearly, the number of rooms would have differed throughout the year; but there were not enough data to show the pattern, and so it was arbitrarily assumed that rooms available in January would also be available in December.

Occupancy tax returns indicate a continuous fall in occupancy rates from 1970 to 1972. Since the number of visitors was increasing annually at this time, and other forms of accommodation were growing at a steady but not outstanding pace, it would seem that collection/recording of tax was inaccurate. Another possible explanation is that an increasing number of hotels was closing for part of the year.

Therefore, only tentative conclusions can be drawn. The occupancy rates indicate there is generally a peak period from December to March, with no secondary season in midsummer, as is found elsewhere in the Caribbean. Seasonal differences seem to be very marked. Occupancy between 1968 and 1972 averages between 22% and 30%, but these estimates should be treated as minimum rates for the reasons given.

Table 4.1.

ANTIGUA - Bed Occupancy Rates in Hotels by Month

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January	34.5	30.2	37.0	26.3	13.1	22.7
February	64.9	84.0	54.7	43.7	27.5	40.6
March	60.0	46.8	36.4	61.4	70.5	50.0
April	39.1	38.0	37.3	26.9	25.0	31.1
May	27.1	26.1	22.1	29.4	21.0	29.4
June	15.5	17.8	15.6	9.9	18.8	
July	14.5	18.2	15.7	10.8	12.0	
August	20.8	19.2	14.7	8.9	12.5	
September	10.6	16.0	15.4	18.4	2.4	
October	11.0	10.9	11.5	8.2	18.2	
November	17.0	16.0	18.6	14.2	12.5	
December	27.6	33.8	28.0	18.7	26.5	
Annual average	28.4	30.1	25.4	23.0	22.0	
Rooms / beds	1798	1888	2102	2062	2208	
Room / bed nights available	685,068	689,120	767,230	752,630	808,128	
Room / bed nights sold	187,211	207,619	194,676	172,797	177,962	

THE BAHAMAS

The figures for room occupancy rates in New Providence, Grand Bahama and the Family Islands (Table 4.2) were taken from the annual reports of the Ministry of Tourism. There are no figures before 1971, when the Hotel Licensing Act was introduced, so it is impossible to discuss trends in occupancy rates. New Providence has higher rates than Grand Bahama, which in turn fares better than the Family Islands. New Providence has two periods of high occupancy, one in February/March/April and a second in July/August, whereas the Family Islands have a less marked summer season. Occupancy rates relate to rooms rather than beds, which is unfortunate, in that it is impossible to estimate total bednights.

The Nassau/Paradise Island Promotion Board also estimates occupancy rates, but its figures for 1971 and 1972 give room occupancy rates only.

The Checchi Report refers to a hotel study made by Horwarth and Horwarth in 1968 which estimated room occupancy rates for different sizes of hotels as follows:

Average Annual Occupancy 1968	
Major hotels	7.8%
Medium hotels	58.2%
Small hotels	65.4%
Family Islands Hotels	67.6%
The Bahamas	67.6%

These results, when compared to those in Table 4.2, suggest that occupancy rates declined between 1968 and 1971.

Table 4.2

THE BAHAMAS - Room Occupancy Rates in Hotels by Month

	<u>New Providence</u>		<u>Grand Bahama</u>		<u>Family Islands</u>	
	<u>1971</u>	<u>1972</u>	<u>1971</u>	<u>1972</u>	<u>1971</u>	<u>1972</u>
January	54.8	57.6		41.6		35.1
February	71.7	77.7		69.1	39.8	55.4
March	70.1	78.3		78.6	51.2	66.6
April	81.9	77.7		54.7	48.6	58.7
May	65.6	58.8		N.A.	35.8	35.3
June	53.9	54.2		N.A.	32.8	32.6
July	77.3	71.4		N.A.	37.1	41.6
August	82.6	80.6		62.1	44.8	43.1
September	46.1	44.7		37.5	28.5	22.8
October	54.9	51.0		40.8	32.3	25.6
November	59.4	65.7		57.1	46.3	39.6
December	61.3	60.2		55.3	36.2	48.9
Annual average	65.0	64.9		N.A.	39.9	43.1
Rooms/ beds	5,097	5,005	3,884	4,136	1,866	2,086
Room/ bed nights available	1,860,405	1,831,830	1,417,660	1,513,776	681,090	763,476
Room/ bed nights sold	1,209,300	1,188,900			271,730	329,050

BARBADOS

Bed occupancy rates are calculated by the Government Statistical Service from an annual bednight survey of hotels and guest houses. Information concerning hotels and guest houses was obtained from the Tourist Board, which omits some smaller premises not recognized by the Board. The classification of hotels and guest houses is that used in the original survey in the early 1960s and is based on rates charged. The 1971 survey covered 15 luxury hotels, 15 'A' class hotels, 5 'B' class hotels, and 8 guest houses. The reliability of the results depends largely upon the response rate, which tended to be better in the 1970s than it was in 1968/69, and better for luxury and 'A' class hotels than for 'B' class hotels and guest houses. In 1971 the response rate related to numbers of beds surveyed was as follows:

Response Rate	
Luxury hotel	90.0%
'A' Class hotels	91.2%
'B' Class hotels	82.7%
Guest houses	82.8%

Since guest houses and 'B' class hotels experience lower than average occupancy it is likely that the survey slightly over-estimates the actual pattern of occupancy rates.

The statistical tables indicate that bed occupancy rates have averaged about 50% in hotels and guest houses during the last four years. From a peak of 52.6% in 1969 they dropped to 45.9% in 1970, but improved in the following two years (Table 4.4). Luxury hotels enjoyed annual average occupancy rates higher than the mean and were at their peak in 1968, when they averaged 56.9%. From a low of 50.6% in 1970, they nearly regained the 1968 average in 1972 (56.2%). Table 4.5 indicates that 'A' class hotels had the highest annual average bed occupancy rates (57.4%) in 1968, but these fell substantially to 41.1% in 1971, recovering to 46.7% in 1972. 'B' class hotel (42.7%) and guest house (42.2%) peaks in 1969 coincided with the national average. Bed occupancy rates in 'B' class hotels, though remaining low, showed improvement in 1971 and 1972, whereas occupancy rates in guest houses declined progressively to a low of 24.4% in 1972.

Comparison of 1968 and 1972 occupancy rates shows that luxury hotels experienced smaller losses than 'A' class hotels, which in turn experienced smaller losses than 'B' class hotels; guest houses had the sharpest fall in occupancy rates. Table 4.3 shows the overall change in occupancy rates between 1968 and 1972. It should be noted that percentage change in occupancy rate, not change in bednights, is recorded. This implies that annual occupancy rates declined most in guest houses and inexpensive hotels.

TABLE 4.3: CHANGE IN OCCUPANCY RATES 1968-1972

		<u>Luxury Hotels</u>	'A' Class Hotels	'B' Class Hotels	Guest houses
February and March (peak season)		-16%	-14%	-5%	-55%
July and August (secondary peak season)		+ 6%	+ 4%	-19%	-48%
September and October (off season)		+32%	+9%	-11%	-35%
Annual Average		- 1%	-23%	-15%	-50%
Range of occupancy rates)	1968	31.0%-86.7%	26.3%-87.0%	24.7%-64.2%	18.2%-60.0%
)	1972	34.1%-83.5%	21.4%-76.8%	19.7%-62.0%	11.9%-38.7%
Standard deviation)	1968	± 19.12	± 18.84%	± 11.76	± 13.36
)	1972	± 14.39	± 15.71	± 11.06	± 7.84

Standard deviation is a useful tool for measuring seasonality. The values for all types of visitor accommodation declined between 1968 and 1972, implying that seasonal fluctuations have become less marked. The values suggest that luxury and 'A' class hotels have greater variations in occupancy rate than do 'B' class hotels or guest houses. Possible explanations are that 'B' class hotels and guest houses cater to West Indian business visitors, who arrive throughout the year and that less affluent tourists who stay in 'B' class hotels tend to travel off-season when prices are reduced.

Table 4.4

BARBADOS - Bed Occupancy Rates in Hotels and Guest Houses by Month

	<u>All hotels and guest houses</u>					<u>Luxury hotels</u>				
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	55.2	63.1	54.3	50.8	48.6	66.4	73.4	62.5	61.7	58.9
February	84.3	82.1	81.1	76.5	75.4	86.7	83.5	86.3	85.9	83.5
March	74.1	70.6	69.1	57.7	60.0	85.6	76.8	79.6	68.6	64.7
April	56.0	51.4	48.7	50.1	50.8	64.9	57.9	55.2	59.9	59.1
May	40.6	38.5	30.1	35.9	32.3	47.1	38.4	30.4	40.1	41.5
June	30.4	47.1	23.5	24.2	24.3	32.2	33.2	24.7	24.2	30.1
July	45.8	48.5	36.4	43.7	43.4	45.2	51.4	38.5	48.3	52.8
August	46.9	50.6	44.4	57.4	48.6	53.5	50.5	46.0	62.1	51.8
September	28.4	30.3	24.4	29.2	31.1	31.0	29.5	23.4	33.9	34.1
October	35.4	34.2	34.2	35.3	43.0	35.7	30.2	40.3	42.8	54.2
November	60.6	54.9	49.7	56.7	58.4	75.8	58.2	55.9	65.5	66.7
December	59.2	55.9	53.7	55.7	58.4	70.7	66.5	62.6	66.6	67.3
Annual average	51.2	52.6	45.9	47.8	48.3	56.9	54.2	50.6	55.5	56.2
Rooms beds	1,993	2,470	3,579	3,946	5,262	914	1,203	1,994	1,992	2,203
Room bed nights available	793,162	977,554	1,197,250	1,263,651	1,631,352	317,219	471,072	618,284	657,412	748,701
Room / bed nights sold	405,812	514,510	550,510	603,404	787,818	180,499	255,281	312,910	364,835	420,924

Table 4.5

BARBADOS - Bed Occupancy Rates in 'A' and 'B' Class Hotels and in Guest Houses by Month

	<u>'A' class hotels</u>					<u>'B' class hotels</u>					<u>Guest houses</u>				
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	61.9	59.7	48.6	41.4	43.1	35.5	39.2	34.9	30.7	37.8	49.1	39.6	40.3	30.0	25.8
February	87.0	85.0	79.5	67.6	76.8	64.2	69.2	63.2	55.2	62.0	60.0	62.9	57.4	52.3	38.7
March	73.7	68.3	60.3	42.7	64.5	52.9	54.4	52.3	45.7	50.0	42.1	54.8	39.6	52.5	27.0
April	53.9	47.6	45.3	38.9	51.8	41.2	36.2	34.7	42.7	37.5	40.0	42.0	30.1	37.9	18.8
May	37.0	39.8	31.3	32.2	26.7	35.5	35.0	22.2	28.2	24.0	19.0	32.4	25.0	28.6	19.3
June	31.1	30.0	21.6	26.1	21.4	24.7	39.6	15.7	15.6	19.7	13.5	32.8	32.9	19.5	11.9
July	48.8	48.6	36.6	42.1	39.6	34.5	32.1	18.6	30.6	32.4	35.1	42.3	40.3	23.8	20.9
August	37.9	52.4	43.5	47.6	50.8	50.2	43.4	32.8	44.0	38.6	58.6	44.6	49.5	54.7	37.4
September	26.3	29.9	27.1	25.4	28.7	23.6	36.8	14.0	16.7	33.0	31.1	37.0	19.8	23.4	22.3
October	36.4	37.4	30.3	29.0	39.5	35.5	39.7	21.1	32.4	25.0	18.2	37.8	18.5	13.1	14.2
November	49.6	53.0	43.8	51.8	57.5	57.9	52.9	34.4	39.6	40.3	25.6	37.2	36.8	13.4	23.4
December	51.0	48.9	45.5	51.3	56.8	50.2	35.1	34.6	42.2	40.3	33.4	41.1	29.8	25.9	28.9
Annual average	57.4	50.2	43.1	41.1	46.7	42.5	42.7	31.6	35.8	36.8	36.6	42.2	35.0	31.8	24.4
Rooms/ beds	838	933	1,239	1,497	1,497	150	200	197	159	532	91	134	149	139	256
Room/ bed nights available	325,570	421,043	456,977	484,892	571,513	58,120	67,263	71,989	61,183	196,944	37,389	45,416	50,004	54,018	114,194
Room/ bed nights sold	186,923	211,300	196,887	199,506	266,616	24,717	28,725	22,731	21,882	72,446	13,698	19,204	17,493	17,181	27,832

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BERMUDA

Annual bed occupancy rates are collected from a regular sample survey of tourist accommodation, which covers 66% of the beds in hotels and cottage colonies.

The Tourist Board publishes monthly rates for total accommodation in hotels and cottage colonies, and adds that in 1972, average annual occupancy rates for the various categories of accommodation were as follows:

Occupancy Rates	
Large Hotels	68.6%
Small Hotels	52.7%
Cottage Colonies	64.8%
Total	66.6%

The monthly bed occupancy rates (Table 4,6) indicate a progressive decline, from an average of 76.1% in 1968 to 66.6% in 1972. This has occurred despite annual increases in total visitors to Bermuda, from 267,442 regular visitors (excluding cruise passengers) in 1968 to 339,782 in 1972. The trend is partly caused by a fall in average length of stay, from 6 days in 1968 to 5.5 in 1972, which would imply an increase in bednights, from 1.6 million in 1968 to 1.83 million in 1972 and indicates a slackening of growth rather than an absolute decline in occupancy rates. Another contributing factor is the 38.8% increase in beds available from 6,175 in 1968 to 8,568 in 1972, compared with a 21% increase in bednights spent. Assuming that all regular visitors stayed in licensed tourist accommodation (i.e., number of visitors staying in boats, with friends, or making other arrangements are insignificant) overall bed occupancy rates would have fallen from 71.0% in 1968 to 58.5% in 1972. These figures indicate first, that occupancy rates for other tourist accommodation, e.g. guest houses and self-catering cottages/apartments, are lower than those in hotels and cottage colonies; and second, that bed occupancy rates have dropped more sharply among guest houses and self-catering cottages than among hotels and cottage colonies.

The distribution of visitors reflected in the bed occupancy rates indicates that Bermuda's main tourist season is from March to the end of August. Prior to 1972, occupancy rates in September and October were also high. April and August are traditionally the best months and prior to 1971, bed occupancy rates could average 100%. In 1972, the monthly averages were 91.3% for April and 81.6% for August. Monthly rates throughout the season varied from 76% to 91% in 1972, compared with 78% to 100% in 1968.

Occupancy rates in the main season are so high that almost all visitors make advance bookings. This enables the Tourist Board to project hotel occupancy rates two months ahead, to identify hotels that have space in the high season and to promote publicity in North America if it seems that rates may be disappointing.

Table 4.6

BERMUDA - Bed Occupancy Rates in Hotels by Month

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January	33.7	32.0	30.1	26.6	33.8	22.9
February	61.0	55.5	54.1	53.0	57.2	45.4
March	83.4	70.9	67.1	72.4	79.6	
April	98.0	101.0	93.9	95.8	91.3	
May	77.7	92.7	93.7	92.8	88.5	
June	88.3	90.7	90.1	84.8	80.8	
July	94.5	95.2	96.8	86.7	75.7	
August	100.3	99.5	100.7	94.9	81.6	
September	75.5	72.2	82.0	78.8	57.5	
October	75.1	78.2	79.6	81.6	69.4	
November	73.8	63.8	58.3	60.4	50.8	
December	41.9	38.4	35.3	38.2	35.1	
Annual average	76.1	75.0	73.1	73.3	66.6	
Rooms / beds	6,175	6,245	6,840	7,425	8,568	
Room / bed nights available	2,260,050	2,279,425	2,496,600	2,710,125	3,127,320	
Room / bed nights sold	1,719,900	1,709,600	1,825,000	1,986,500	2,082,800	

BRITISH VIRGIN ISLANDS

Compilation of statistics was not begun until 1972. Consequently, room occupancy rates are available for five months only, from December 1972 to April 1973. Information was obtained from a monthly survey of hotels, guest houses and charter yacht operators. The figures for small hotels and guest houses (defined as establishments with fewer than 20 rooms) are not complete, since returns were received from only 4 of 14, and the statistician considers that non-response is most common among institutions with lower-than-average occupancy rates.

The results are shown in Table 4.7. Occupancy rates for all hotels and guest houses are calculated on the assumption that the 10 small hotels and guest houses that did not complete the survey had the same rates as the others. The table indicates that total room occupancy rates for hotels and guest houses reached a peak of 68% in January, falling to 41% in April. Large hotels had higher occupancy rates than small hotels. The peak month for large hotels was March (88%), and for small hotels and guest houses, January (42.3%). Occupancy rates on yachts available for charter were higher than in hotels and guest houses, rising to 91% in February.

The Inland Revenue Department, which collects occupancy tax from the various hotels, also has bednight figures for the larger hotels. Records of the six main hotels, which together provided two thirds of the hotel beds, were examined for 1970. The results showed great variations among hotels, with occupancy rates much below 50% on average. This was partly due to the relative infancy of tourism in the islands and partly because of the newness of some of the hotels. Experience shows that a hotel reaches its potential two or three years after operations commenced.

Table 4.7

BRITISH VIRGIN ISLANDS - Room Occupancy Rates in Hotels and Guest Houses by Month^{1/}

	<u>All Hotels and Guest Houses</u>	<u>Large Hotels</u>	<u>Small Hotels/ Guest Houses</u>	<u>Yacht Charters</u>
December 1972	54.1	58.6	32.8	60.8
January 1973	68.0	72.2	42.3	77.5
February 1973	65.5	87.3	39.4	91.1
March 1973	66.3	88.0	40.5	85.2
April 1973	41.0	57.6	21.2	*53.3

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^{1/} Figures from only two of the three companies

CAYMAN ISLANDS

Monthly occupancy rates for hotels (excluding guest houses, cottages and apartments) are available from the Tourist Board for 1970-1972 only (Table 4.8). It is unclear whether they relate to room or bed occupancy.

Occupancy rates have grown in the last two years, despite a substantial increase in the number of beds, from an estimated 434 in 1970 to 770 in 1972. Average occupancy increased from 36.4% in 1970 to 39.1% in 1971, and rose sharply, to 50% in 1972. The substantial increase in 1972 is attributed to the opening of the Holiday Inn, which accommodated groups of tourists brought by the hotel operators. February and March are the peak months for hotels, with occupancy rates in the sixties and seventies, but in 1972, a secondary peak in July and August was discernible.

The increases in occupancy rates are encouraging, but there is still much spare capacity in supply. Averages exceeded 80% for only one month during the three-year period. Hence the proposal to adopt a policy of control on future new hotel construction would seem sensible.

Table 4.8

CAYMAN ISLANDS - Hotel Occupancy Rates by Month, Annually

	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	61.5	44.6	58.2
February	60.6	81.8	70.6
March	68.8	66.9	71.5
April	28.4	44.3	56.5
May	23.4	22.5	39.5
June	24.3	10.7	35.7
July	15.0	38.9	40.1
August	32.4	34.3	44.6
September	13.3	8.9	21.0
October	22.6	15.6	34.1
November	35.0	42.5	48.1
December	46.4	48.3	63.1
Annual average .	36.4	39.1	50.0

DOMINICA

The Ministry of Planning and Development provided monthly bednight figures for hotels and guest houses in 1972 (Table 4.9) and individual hoteliers contributed their impressions. The hotel occupancy tax, which is paid at the rate of 5% of roomnight revenue, was investigated as a possible additional source of occupancy rates. However this information was only available from April 1971 and does not, therefore, add much to the Ministry's information.

Bed occupancy rates are low on average. Complete figures for 1972 were available from 10 hotels and guest houses, in which bed occupancy rates averaged 23.8%. Fort Young Hotel in Roseau experienced the highest occupancy rate of 40.6%.

Most hotels enjoy a high season in winter and a secondary season in midsummer, although the seasons are less distinguishable in Dominica than in islands where tourism is more highly developed. Castaways Hotel recorded the highest occupancy rate, 76.1% in February; clearly, there is spare capacity in the accommodation supply.

The owner of Castaways Hotel commented that occupancy rates generally averaged 35% a year; the previous season had been the worst and 1969 was the best year. Two new hotels, Anchorage and Riviere la Croix, reported their occupancy rates improved steadily.

Table 4.9

DOMINICA - Bed Occupancy Rates in Individual Hotels and Guest Houses by Month

	Island House	Castaways	Fort Young	Travelodge	Asta	Sisseron	Cherry lodge	Kent Anthony	Anchor- age	Over- niter	Riviere la Croix	Castle Comfort	Douglas G/House	Hysam's G/House
January	26.4	32.6	46.2	27.4	22.3	41.6	3.0	30.7		5.4	7.1	58.4		
February	35.1	76.1	65.0	23.0	39.0	53.1	3.1	23.0		11.0	3.9	35.9		
March	19.0	51.5	51.4	15.1	25.7	19.0	1.3	14.3		2.4	5.5	19.0	4.3	
April	22.0	36.3	41.4	5.6	21.8	32.8	4.3	20.5		1.6	10.0	22.0		
May	9.1	10.2	31.9	2.7	17.1	19.9	4.2	23.8		5.8	4.4	19.0		
June	7.5	6.2	37.4	20.0	10.5	21.0	1.3	13.0		1.4	11.0	14.3	15.0	69.3
July	9.0	21.3	42.0	10.8	24.5	23.5	2.6	26.6	14.2	2.2	10.8	25.5	1.1	77.4
August	11.6	28.7	47.2	29.0	28.5	26.0	9.7	34.4	15.7	5.4	19.4	32.6	7.0	
September	3.4	15.4	29.5	17.8	14.9	14.0	3.3	20.8	2.6	4.4	5.5	11.7	6.1	
October	8.7	10.5	36.5	14.5	9.7	17.8	2.3	16.7	4.0	3.0	9.4	6.1		
November	31.0	19.1	32.4	12.8	9.6	13.3	7.0	19.4	11.0	5.5	N.A.	41.9		
December	7.0	20.5	26.7	7.5	4.3	9.4	4.2	27.3	8.8	3.9	N.A.	43.2		
Annual average	15.8	27.2	40.6	13.8	18.9	24.2	3.9	22.6	N.A.	4.3	N.A.	27.6	N.A.	N.A.
Rooms/ beds	32	34	52	6	40	40	10	21	32	15	14	10	6	5
Room/ bed nights available	11,712	12,444	19,032	2,196	14,640	14,640	3,650	7,686	-	5,490	-	3,660	-	-
Room/ bed nights sold	1,849	3,390	7,721	304	2,770	3,539	141	1,739	-	234	-	1,010	-	-

DOMINICAN REPUBLIC

There are no statistics available on hotel occupancy. Shankland Cox Partnership's study of tourism in the Puerto Plata region gives these estimates for annual average bed occupancy rates in hotels: State-owned commercial hotels, 25-35%; privately owned tourist hotels, 75-80%.

GRENADA

A rough attempt was made to estimate the annual occupancy rates for those hotels that paid occupancy tax in 1972. The Government charges a 5% tax on all purchases made in hotels, guest houses and cottages. The list showing hotel payments was incomplete and it is not clear whether some establishments are exempt from tax or whether their 1972 returns have not been recorded. The proposed methodology was to judge total revenue from the known 5% fiscal payment and to estimate the number of bednights from total revenue. The attempt failed, partly because hotel rates varied for single and double occupancy and for summer and winter visitors, leaving no basis for determining an average. In addition, some hotels offered guests a modified American plan and others an American plan; it was not known how much expenditure was made for food, beverages, laundry or other amenities, nor how much revenue was raised by non-hotel guests.

JAMAICA

Bed and room occupancy rates for hotels in the various resort areas are published in the Tourist Board's annual report.

Bed occupancy throughout the island fell annually, from 63% in 1968 to 45.3% in 1972; the greatest decline was between 1969 and 1970 (Table 4.10). Occupancy rates peak in February. In 1968, February rates averaged 88.4%, whereas in 1972 they were only 66.2%.

The highest bed occupancy rates in 1968 occurred in the Ocho Rios area (67.9%) followed by Montego Bay with 64.0%, Kingston with 57.2% and Port Antonio with 37.2% (Tables 4.11 and 4.12). Rates fell in all resort areas between 1968 and 1972. The Ocho Rios average of 47.4% in 1972 indicated a slightly more rapid decline than did that of Montego Bay, where the rate was 49.2%. In both these areas, rates had rallied in 1971 but slumped again in 1972. Kingston, Port Antonio and Mandeville have all experienced a continuing yearly decline in occupancy rates.

Annual occupancy averages for 1972 were very low, less than 40%. Kingston hotels have spare capacity year-round, because they accommodate many business visitors who are distributed throughout the year more evenly than are tourist visitors. Kingston appears to have lost some of its tourist trade since 1968 when in February, the peak month for visitors, bed occupancy rates averaged 76.9%. In 1972, the average occupancy rate in August was 49.3%, whereas February rates were only 43.3%. Visitors were evenly distributed in 1972 when average bed occupancy ranged from 28.1% in May to 49.3% in August.

The greatest seasonal variations were recorded in Montego Bay and the Ocho Rios area, which cater mainly to tourist visitors. Both receive large numbers of tourists between December and April, with a secondary peak in July and August. This may be partly caused by Kingston residents, who spend summer holidays along the North Coast.

Figures for the Mandeville area are only available since 1970. There were distinctive peaks in occupancy rates in January-February and July-September periods in 1970, indicating that foreign tourists were visiting the area. The 1972 figures, however, show much lower and much more evenly distributed bed occupancy rates, suggesting that foreign tourism has made little impact on the area.

Room occupancy statistics are available for all hotels in Jamaica (Table 4.10) and for the leading 20 tourist hotels in Montego Bay, Ocho Rios and Kingston (Table 4.13). They indicate that the twenty tourist hotels enjoy significantly higher occupancy rates than average. Moreover, these hotels suffered smaller average losses overall. In 1968, the leading hotels achieved occupancy rates 15% above the Jamaican average, whereas in 1972 they were 19% above that average.

The leading hotels seem to have lost some visitor trade in July and August, since occupancy rates for these months were 33% lower in 1972 than in 1968. Possibly these hotels did not lower their summer rates as much as other hotels did, or summer visitors were more attracted to the increasing amount of self-catering accommodation available. Occupancy rates in the peak months of January and February have fallen by only 12% since 1968, and February room occupancy rates remained above 90% in 1972.

Table 4.10

JAMAICA - Bed and Room Occupancy Rates in Hotels by Month, Annually

	<u>Bed occupancy rates</u>					<u>Room occupancy rates</u>				
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	69.7	70.4	56.9	46.4	51.1	73.8	73.5	61.4	50.7	54.7
February	88.4	86.2	77.5	69.4	66.2	91.6	89.5	80.9	73.5	70.0
March	76.7	74.1	65.0	52.6	57.1	79.4	77.8	68.2	57.4	59.8
April	65.7	62.7	45.1	54.7	48.5	67.0	65.0	50.7	56.6	51.0
May	55.3	43.7	35.7	38.9	32.3	60.6	48.7	41.0	44.2	35.7
June	52.4	41.4	33.6	28.4	34.4	56.6	45.2	38.5	40.7	37.4
July	66.2	56.4	46.5	53.4	46.1	69.5	59.2	46.7	57.2	48.2
August	73.9	65.8	49.4	59.6	53.3	76.4	68.0	52.6	62.1	55.7
September	38.5	38.8	30.3	28.0	28.9	43.1	43.5	35.4	34.4	33.3
October	41.7	44.5	29.8	31.6	30.9	47.0	49.3	34.3	35.9	35.8
November	63.5	55.2	41.4	46.7	46.2	69.4	60.3	47.0	52.4	53.0
December	64.7	58.6	50.0	51.4	51.0	67.4	60.1	52.4	53.6	54.6
Annual average	63.0	58.7	46.2	46.3	45.3	66.8	62.1	50.1	51.5	48.9
Rooms/ beds	6,365	6,859	9,341	10,497	11,870	3,307	3,561	4,788	5,354	6,021
Room/ bed nights available	2,315,503	2,544,520	3,407,799	3,916,862	4,343,717	1,204,308	1,321,424	1,749,200	1,953,297	2,203,115
Room/ bed nights sold	1,458,767	1,493,633	1,574,403	1,813,507	1,967,704	804,478	820,604	876,349	1,005,948	1,077,321

Table 4.11

JAMAICA - Bed Occupancy Rates in Kingston and Montego Bay Hotels by Month

	<u>Kingston</u>					<u>Montego Bay</u>				
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	60.8	64.0	62.5	39.5	36.5	74.1	72.5	57.2	50.3	57.5
February	76.9	73.6	64.9	46.1	43.3	90.3	88.4	82.4	78.5	74.0
March	59.9	63.4	54.8	42.8	38.1	79.3	75.8	70.3	57.3	59.7
April	51.6	52.4	45.8	37.1	35.7	66.5	60.5	45.9	59.2	54.2
May	52.3	44.5	42.4	34.0	28.1	56.8	39.7	32.4	39.2	34.9
June	50.9	45.4	35.2	36.2	29.3	51.4	38.7	32.2	36.5	37.1
July	61.3	55.7	39.5	47.8	38.1	67.3	51.2	53.2	57.5	55.3
August	68.4	60.5	48.2	52.4	49.3	74.7	61.5	52.3	63.5	59.0
September	45.1	43.1	35.1	34.4	33.8	37.1	33.2	26.1	25.9	30.2
October	47.9	48.7	32.3	30.5	37.0	38.7	36.7	28.1	29.5	27.4
November	57.2	55.0	33.5	38.4	40.4	63.4	52.5	47.5	52.2	49.5
December	55.4	49.5	34.9	32.5	36.3	64.4	62.5	56.5	57.4	56.3
Annual average	57.2	54.5	42.6	39.3	37.1	64.0	57.1	48.1	50.5	49.2
Rooms / beds	1,195	1,264	1,792	2,055	1,980	2,841	3,230	4,285	5,018	5,762
Room / bed nights available	435,126	468,837	654,167	750,529	724,043	1,034,028	1,198,497	1,563,285	1,837,713	2,107,665
Room / bed nights sold	248,892	255,516	278,675	294,958	268,620	661,778	684,342	751,940	925,520	1,036,971

Table 4.12

JAMAICA - Bed Occupancy Rates in Hotels in Ocho Rios, Port Antonio and Mandeville, by Month

	<u>Ocho Rios</u>					<u>Port Antonio</u>					<u>Mandeville</u>		
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	72.7	74.3	56.0	48.6	54.9	33.6	42.7	31.2	19.9	25.1	43.8	27.1	20.7
February	94.8	92.2	80.1	75.2	73.3	64.9	66.2	42.7	43.6	46.2	53.3	25.8	18.2
March	85.4	81.3	65.4	53.3	68.4	47.3	41.0	45.8	47.0	45.5	39.6	28.0	22.9
April	74.9	74.3	47.5	63.1	50.9	45.1	40.8	32.3	32.0	26.6	30.4	31.3	19.5
May	57.6	54.3	38.7	44.6	32.7	30.0	22.9	22.0	19.0	19.0	33.0	25.6	19.5
June	57.3	45.2	34.9	38.2	35.7	31.5	23.2	27.3	18.2	19.0	38.0	26.4	19.2
July	71.6	68.6	42.2	55.2	39.8	35.0	31.3	29.0	26.5	24.9	50.9	23.6	20.6
August	79.6	78.9	46.7	63.7	51.0	43.8	41.4	35.3	30.3	29.6	51.1	24.3	23.1
September	35.5	45.8	32.4	29.5	26.9	19.3	21.8	26.2	14.5	12.2	51.3	16.7	18.2
October	44.2	54.8	31.0	37.7	38.4	23.9	30.3	21.1	21.9	29.2	35.5	18.3	21.7
November	69.6	61.9	40.0	47.3	48.9	42.9	28.1	20.2	26.2	20.9	22.2	18.5	19.1
December	73.2	59.7	53.9	58.0	55.0	41.0	37.8	26.6	37.8	31.2	12.1	16.3	14.0
Annual average	67.9	66.1	47.1	51.1	47.4	37.2	36.1	29.9	28.1	27.1	37.9	23.0	19.6
Rooms/ beds	2,085	2,126	2,910	2,918	3,483	244	239	202	316	435	152	190	210
Room/ bed nights available	758,498	788,461	1,063,015	1,065,826	1,274,057	88,917	88,759	73,759	115,395	159,292	55,551	69,417	76,449
Room/ bed nights sold	515,020	521,730	500,680	544,637	603,903	33,077	32,042	22,054	32,426	43,168	21,054	15,966	15,042

Table 4.13

JAMAICA - Room Occupancy Rates in Twenty Leading Tourist Hotels,
by Month ^{1/}

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	87.6	86.8	80.4	70.4	73.0
February	97.6	96.5	94.0	84.1	90.4
March	92.7	91.8	85.9	73.7	85.2
April	82.8	82.2	83.0	74.4	72.5
May	78.7	66.8	57.3	59.2	53.3
June	75.0	60.8	57.5	52.1	54.4
July	86.5	78.6	68.6	67.0	61.5
August	92.0	84.5	71.6	71.6	73.0
September	55.8	62.2	49.2	44.2	43.5
October	62.4	60.2	43.9	46.3	62.0
November	87.2	77.0	63.6	65.1	77.0
December	79.4	72.3	64.9	64.8	71.9
Annual average	81.5	77.0	67.4	64.4	68.1

^{1/} 4 in Kingston, 10 in Montego Bay, 6 in Ocho Rios.

MONTSERRAT

Monthly bed occupancy rates for hotels and guest houses are estimated from the occupancy tax returns. This tax is levied on all hotels and guest houses in Montserrat, at the rate of \$2 per bednight. This data base does not seem very reliable, partly because monthly revenue figures are expressed in dollars and cents and not always in multiples of \$2, and partly because sharp monthly fluctuations occur. This may be explained by a tendency to delay tax payment. Annual occupancy rates derived from the tax figures do, however, compare favorably with the rates estimated in a survey of four hotels in 1970 by Transport and Tourism Technicians, who examined the occupancy rates of the Coconut Hill, Emerald Isle, Vue Pointe and Wade Inn hotels (Table 4.14). Consultants commented that of the four hotels surveyed in 1970, occupancy rates were highest at the Vue Pointe Hotel. (Bed occupancy rates for the Vue Pointe Hotel were obtained directly from the manager for 1971-73.)

Average bed occupancy seems to have declined between 1969 and 1970 due to a decrease in total bednights spent in hotels and guest houses. On the average, occupancy rates are typically low, varying from 26.7% in 1969 to 19.3% in 1972.

Monthly figures for the four leading hotels indicate seasonal trends, with occupancy rates rising to 55% in February 1970. The Vue Pointe Hotel achieved occupancy rates of 68.8% in February 1970 and 78.6% in March 1971. In general, the occupancy figures for Montserrat do not indicate a very prosperous hotel industry.

Table 4.14

MONTSERRAT - Bed Occupancy Rates in Hotels and Guest Houses, by Month

	<u>Hotels and Guest Houses</u>					<u>Four Hotels</u> ^{1/}	<u>Vue Pointe Hotel</u>			
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1970</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January	25.2	13.9	26.1	18.3	7.4	25.2	41.9	50.2	35	36
February	1.7	3.1	59.0	36.3	24.1	55.3	68.8	69.7	63	49
March	72.7	88.9	15.9	42.8	43.9	49.5	65.3	78.6	53	70
April	54.6	60.5	49.3	48.8	46.3	27.2	40.0	40.4	50	
May	9.9	42.2	31.2	40.3	25.6	17.9	17.1	13.4	19	
June	2.5	16.1	13.7	12.4	11.0	12.8	11.3	20.3	16	
July	60.7	19.2	8.8	15.5	9.4	13.0	17.6	20.8	22	
August	21.9	15.5	14.4	16.4	30.2	23.9	31.9	20.7	18	
September	17.7	16.5	21.3	17.5	11.5	14.9	7.6	15.2	9	
October	8.1	16.0	13.0	19.4	8.8	14.6	13.9	12.9	12	
November	21.7	10.4	11.5	13.1	6.0	19.7	20.5	13.4	16	
December	15.0	15.8	20.6	20.7	7.3	28.4	19.8	12.3	23	
Annual average	26.1	26.7	23.4	25.1	19.3	24.9				
Rooms/ beds (Dec)	102	110	142	166	166					
Room/ bed nights available	37,332	40,150	51,830	60,590	60,590					
Room/ bed nights sold	9,753	10,724	12,140	15,183	11,702					

^{1/} Wade Inn, Coconut Hill, Vue Pointe and Emerald Isle.

Source: Transport & Tourism Technicians Limited.

Table 4.16

PUERTO RICO - Room Occupancy Rates in Hotels and Guest Houses by Month

	<u>SAN JUAN - Hotels</u>					<u>SAN JUAN - Selected Guest Houses</u>					<u>Selected Island Hotels</u>				
	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	78.1	82.9	75.3	75.6	69.1	68.2	75.1	72.9	60.2	56.8	67.7	69.6	74.2	65.7	60.6
February	93.4	93.0	89.7	88.4	82.7	81.6	80.3	79.6	71.8	69.9	80.4	85.7	85.2	76.7	67.6
March	83.1	79.7	73.3	66.5	72.2	65.4	76.9	70.8	54.9	58.0	54.9	64.6	68.7	60.6	62.7
April	76.9	68.1	62.0	73.2	77.7	62.3	67.6	52.6	49.3	52.4	55.8	57.3	67.3	57.9	60.4
May	78.5	70.3	60.6	66.5	63.6	50.1	44.3	37.9	38.3	34.0	54.3	60.9	61.5	59.2	52.3
June	74.4	60.5	54.0	57.2	58.3	56.0	47.0	43.5	37.5	34.8	45.3	54.2	56.0	57.0	49.9
July	87.7	70.1	69.6	66.8		66.1	56.0	50.3	50.5		57.1	59.3	70.1	66.3	
August	92.6	74.8	70.9	68.6		75.4	58.6	53.6	49.5		47.0	58.7	65.3	56.9	
September	67.7	52.0	53.9	53.8		50.5	40.2	54.4	36.7		44.6	49.4	64.1	54.7	
October	68.8	61.4	54.3	57.9		46.4	37.2	30.1	32.6		46.2	52.3	57.0	61.8	
November	80.3	69.1	66.9	68.1		53.5	49.7	43.5	41.6		63.9	54.7	65.4	63.8	
December	79.3	71.5	69.7	69.6		64.9	60.3	50.5	51.7		67.8	71.4	68.9	63.3	
Annual average	80.0	71.0	66.6	67.6		61.7	57.7	53.7	47.8		57.0	61.4	66.9	61.9	
Rooms/ beds (June)	6,280	6,292	6,690	6,385	6,512	308	348	362	411	384	1,774	1,831	1,839	1,952	2,267
Room/ bed nights available	2,298,480	2,296,580	2,441,850	2,330,525	2,383,392	112,728	127,020	132,130	150,015	140,544	649,284	668,315	671,235	712,480	823,455
Room/ bed nights sold	1,838,784	1,630,572	1,626,272	1,575,435		69,553	73,291	70,954	71,707		370,692	410,345	449,056	441,025	

PUERTO RICO

Room occupancy rates are published in "Selected Statistics of the Tourism Industry of Puerto Rico 1971/72" by the Tourism Development Company. These tables give room occupancy rates for hotels and selected guest houses in San Juan and for selected island hotels. They also indicate hotel registrations and daily average numbers of guests each month. Unfortunately, they do not give bedspaces available, so bed occupancy rates cannot be calculated. Another deficiency is that no definition of "selected hotels" is given. It is assumed that "island" hotels refer to all hotels outside San Juan (Table 4.16).

Hotel room occupancy rates have remained high between 1968 and 1972, although there has been a steady decline, from 80% in 1968 to 66.6% in 1970. Rates improved in 1971, probably due to a slight reduction in the number of rooms available. However, figures for the first six months of 1972 suggest a further deterioration.

Monthly occupancy figures for San Juan hotels show only small variations from the mean, reflecting the large number of business, convention and total resident visitors who supplement the pleasure tourists. There were two fairly equal peak seasons in 1968 in February/March and July/August, whereas 1971 saw a well marked peak in January/February, but fairly normal occupancy in July/August. The decline in the annual average between 1968 and 1971 was 12%. Occupancy rates for the months of July and August together fell by 33% in that period, whereas January/February/March rates fell by only 10%. September and October, which are slack months, experienced a 22% decrease between 1968 and 1971. Therefore, it seems that the hotels are sustaining their peak occupancy rates in winter but not in the summer and off seasons.

Room occupancy rates in guest houses are generally 15-20% lower on average than hotel rates. Guest house rates have suffered greater reductions than have hotels between 1968 and 1971; 1971 guest house occupancy rates were 29% lower than in 1968. As with hotels, guest house occupancy rates have remained high in the winter season but have fallen in the summer and autumn. Guest houses in San Juan do not experience wide monthly trade fluctuation as do hotels and guest houses in other parts of the Caribbean.

Room occupancy rates for hotels outside San Juan follow a substantially different pattern than those in the metropolitan area. Annual average occupancy was comparatively low in 1968, but improved to 66.9% in 1970; since then, it has declined. This trend is probably due to a change in the pattern of rooms available: between 1968 and 1970 the number of available rooms increased by 4% and in the subsequent two years, by a further 23%. Monthly occupancy figures for island hotels show more marked seasonal differences than hotels in San Juan, although occupancy rates for May to October (outside the main season) have improved significantly. It seems that Puerto Rican residents staying in island hotels are partly responsible for past improvements in annual occupancy rates: in 1968/69 (fiscal year) 96% of hotel

visitors were Puerto Ricans, compared with 54% in 1971/72. Local residents also contribute towards stabilization of room occupancy rates throughout the year, as is indicated by Table 4.15. Puerto Ricans use hotels mainly between June and October, whereas foreign visitors come mainly between January and May.

TABLE 4.15: DISTRIBUTION OF PUERTO RICAN AND FOREIGN HOTEL VISITORS
BY MONTH, FY1971/72

	Puerto Rican Residents (%)	Foreign Residents (%)
July	13.4	10.3
August	9.9	6.7
September	7.5	5.7
October	8.1	8.1
November	7.1	8.9
December	7.2	6.9
January	7.7	9.0
February	6.4	9.4
March	7.7	9.9
April	7.3	10.1
May	6.7	9.6
June	<u>11.0</u>	<u>5.5</u>
TOTAL	100.0	100.0

ST. KITTS/NEVIS/ANGUILLA

There are no data on occupancy rates prior to January 1973, when the Statistical Department in St. Kitts initiated a monthly survey of hotels, guest houses and cottage accommodation. The returns had been filed without processing and examination revealed that some were incomplete and others wrongly filled out. Some establishments did not respond.

Nevertheless, the returns from 25 establishments, which contain 494 of the territory's 930 beds, were analyzed (Table 4.17). Bed occupancy rates were calculated for four categories of accommodation between January and April 1973. Establishments with fewer than ten beds were generally cottages; those with 10-19 beds were essentially guest houses; small hotels had fewer than 50 beds and larger hotels more than 50.

Bed occupancy rates for all types of accommodation were low, less than 30%, although the months from January to April represent the main tourist season. The highest average occupancy rates for the period were achieved by guest houses (with 10-19 beds). Their rates rose to 53.7% in February (1973). Small hotels and cottages had above average occupancy rates, although cottage rates showed a tendency to vary greatly, from zero occupancy to 78%. Three small hotels maintained healthy bed occupancy rates, but both larger hotels had monthly occupancy rates well below the average.

Table 4.17

ST. KITTS - Bed Occupancy Rates in All Types of Accommodation, by Month

<u>1973</u>	<u>Number of Beds</u>				<u>Total</u>
	<u>0 - 9</u>	<u>10 - 19</u>	<u>20 - 49</u>	<u>50+</u>	
January	7.8	27.2	19.2	6.7	13.1
February	33.6	53.7	36.7	16.2	28.4
March	27.9	25.2	26.2	14.3	21.9
April	13.3	16.2	14.3	10.2	12.6
Rooms / beds (January)	63	51	191	189	494

Table 4.18

ST. KITTS - Bed Occupancy Rates by Month in Individual Hotels, Guest Houses and Villas

1973	A	B	C	D	E	F	G	H	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
January	16.1	0	0	0	7.1	40.0	-	1.1	3.9	6.8	8.0	34.0	-	21.0	-	7.9	39.8	15.5	33.1	13.8	47.0	1.9	4.1	12.0	24.6
February	50.0	0	0	25.0	40.7	40.0	63.1	4.8	23.4	21.8	77.8	62.7	-	45.5	-	25.0	64.3	62.0	45.1	13.6	60.9	-	4.9	25.2	11.7
March	48.4	21.5	-	11.3	4.5	40.0	-	27.2	16.5	28.7	55.9	75.8	4.7	13.7	10.8	11.9	50.2	41.5	35.1	-	50.8	11.8	0.6	15.3	13.7
April	-	0	-	0	-	20.0	-	35.0	20.7	-	8.8	37.6	7.6	11.4	11.4	-	9.8	20.3	23.1	-	32.4	6.9	9.6	15.7	7.5
Rooms / beds	2	4	4	4	5	5	6	9	9	9	11	11	12	17	20	20	20	22	22	25	26	36	63	126	

NOTE: Alphabetical designations are used for individual accommodation units to ensure anonymity.

ST. LUCIA

The Tourist Board has been trying for some years to obtain bednight figures from the hotels. Its annual reports repeatedly comment that the statistics are not submitted regularly.

The Income Tax Office provided monthly figures for a number of hotels and guest houses, from February 1970 onwards when the occupancy tax was introduced. Figures derived from occupancy tax may be inaccurate. Also, there are many gaps in the statistics where hotels have not fully completed their tax returns.

The statistics revealed inadequacies in the rates sheets which clearly omit some operational hotels.

Monthly bed occupancy rates 1970-1973 were calculated from figures for nine hotels and four guest houses which had 500 beds in 1972 (Tables 4.19 to 4.22). There were no statistics indicating change in the number of bednights available each month and annual estimates were multiplied by the number of days in a month to derive a crude capacity figure.

All hotels and guest houses seem to have suffered low average annual rates between 1970 and 1973 but performance was mixed. The peak months were generally February-March and July-August, although, with one exception in one hotel in one month, the occupancy level does not approach capacity.

Guest houses all experience peak occupancy in the July-September period. Possibly they cater mainly to West Indians, who arrive in the summer, rather than to North Americans, who typically come in the winter.

Table 4.19

ST. LUCIA - Bed Occupancy Rates in Individual Hotels, by Month

	<u>Anse Chastanet</u>			<u>Margot des Roseaux</u>			<u>Kimarra Hotel</u>		<u>Elwin's Guest House</u>		
	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1971</u>	<u>1972</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
January	-	29.1	32.3	-	-	8.9	36.5	10.9	-	14.1	12.7
February	12.2	32.5	58.4	59.0	-	10.7	20.4	19.8	15.9	8.8	17.0
March	14.6	22.8	38.5	51.1	-	10.7	23.8	32.4	19.9	8.3	13.9
April	9.4	19.8	21.9	11.9	-	10.5	16.0		5.6	21.0	7.3
May	3.9	6.0	7.9	9.8	-	1.7	10.7		10.4	31.5	18.1
June	4.1	10.3	2.5	9.0	-	0.5	5.1		34.6	16.8	19.7
July	5.6	5.0	12.1	2.0	-	2.8	11.5		23.0	24.4	28.0
August	4.5	8.6	16.3	6.3	-	4.1	7.6		26.6	19.0	44.7
September	5.0	3.8	2.0	4.4	-	1.3	11.5		3.1	16.5	15.9
October	5.6	3.9	5.6	-	-	-	17.4		5.2	8.9	13.5
November	14.7	12.8	6.9	-	-	6.8	16.1		6.5	3.5	1.9
December	43.1	27.8	24.1	-	-	-	12.9		11.3	13.3	9.6
Annual average	-	15.1	18.9	NA	NA	NA	15.8		NA	15.6	16.9
Rooms/ beds	36	36	36	28	28	28	28	28	26	26	26
Room/ bed nights available	13,140	13,140	13,176				10,220			9,490	9,516
Room/ bed nights sold		1,982	2,495				1,615			1,479	1,610

Table 4.20

ST. LUCIA - Bed Occupancy Rates in Individual Hotels and Guest Houses, by Month

	<u>La Toc Village</u>	<u>Cloud's Nest</u>	<u>East Winds Inn</u>				<u>James' Guest House</u>			
	<u>1972</u>	<u>1970</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January	10.3	-	-	35.0	43.5	33.9	-	12.9	9.9	7.5
February	36.2	11.2	50.9	53.8	77.9		4.2	10.0	6.9	
March	25.0	24.3	63.9	24.7	70.8		20.4	10.0	9.7	
April	18.9	24.4	32.7	39.7	17.5		15.2	14.6	11.5	
May	15.7	23.3	25.5	17.9	-		11.7	15.9	8.5	
June	11.7	20.4	12.2	12.0	-		10.2	8.1	9.6	
July	22.3	-	21.5	38.1	11.6		13.9	18.5	13.7	
August	20.7	16.7	25.8	41.8	16.0		24.0	12.9	19.6	
September	18.0	16.4	19.5	3.2	4.7		12.7	20.8	12.7	
October	-	16.0	26.0	21.5	24.8		7.5	8.5		
November	22.7	16.0	31.5	37.2	9.0		7.1	7.1		
December	24.4	9.4	26.5	25.1	24.7		11.5	6.9	10.3	
Annual average	NA	NA	NA	29.0	NA		NA	10.6	NA	
Rooms/ beds	100	28	20	20	20	20	16	16	16	16
Room/ bed nights available				7,300				5,840		
Room/ bed nights sold				2,118				618		

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Table 4.21

ST LUCIA - Bed Occupancy Rates in Individual Hotels, by Month

	<u>Malabar Beach Hotel</u>				<u>Villa Hotel & Beach Club</u>				<u>Holiday Inn</u>			
	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January	-	38.2	35.3	38.8	-	63.8	37.8	18.1	5.4	25.2	44.3	
February	46.6	40.5	72.7	72.3	53.8	82.7	59.1	66.8	17.7	79.1	80.9	
March	55.2	53.6	56.7	62.7	96.2	52.4	35.4	34.4	13.6	51.6		
April	39.9	25.5	37.4	39.3	60.6	33.6	20.4		16.8	34.8		
May	38.7	29.1	27.7		42.3	33.3	18.7		14.2	16.2		
June	25.0	29.4	24.2		33.2	24.6	25.5		5.0	8.8		
July	41.4	50.6	21.2		54.7	27.9	33.1			24.6		
August	48.1	48.6	37.5		66.0	25.2	44.0			17.4		
September	40.2	31.5	19.0		19.0	15.2	17.7			10.5		
October	42.8	28.7	34.1		21.9	17.7	18.4		2.4	14.7		
November	52.4	41.9	43.0		26.5	19.6	17.0		4.8	39.2	20.2	
December	38.4	38.3	34.0		23.2	30.3	16.9		6.0	22.4	45.3	
Annual average	-	38.0	36.3		-	35.1	28.6		-	-	28.9	-
Rooms/ beds	98	98	98	100	28	28	28		-	-	240	380
Room/ bed nights available											87,840	
Room/ bed nights sold											25,364	

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Table 4.22.

ST. LUCIA - Bed Occupancy Rates in Individual Guest Houses by Month

	<u>William's Guest House</u>			<u>Allain's Guest House</u>			
	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January		53.6	7.8	-	7.5	27.4	-
February	51.8	28.4	6.0	-	10.7	33.9	8.9
March	41.9	18.1	3.5	41.9	6.5	5.4	
April	46.3	33.8	10.9	9.4	-	-	
May	30.2	-	12.4	9.1	7.5	18.3	
June	10.0	22.9	5.8	11.1	6.1	3.3	
July	89.5	17.3	11.3	9.1	8.1	2.2	
August	90.3	45.5	28.2	9.1	2.7	4.8	
September	56.3	22.9	17.4	38.7	9.4	-	
October	49.6	12.9	7.1	16.1	1.6	3.3	
November	15.8	5.0	6.4	3.9	4.4	-	
December	18.5	56.5	13.6	4.8	12.4	-	
Annual average	N. A.	N. A.	10.9	N. A.	N. A.		
Rooms/ beds	8	8	8	6	6		
Room/ bed nights available			2,928				
Room/ bed nights sold			318				

ST. VINCENT

Neither the Tourist Board nor the Hotels Association collects occupancy rate statistics and there is no occupancy tax from which rates might be deduced.

The Hotels Association comments that occupancy rates generally ranged between 30% and 40%, but in 1973 they had slumped. Hotels claim that reservations are being cancelled because air services to St. Vincent are irregular and visitors fear they may be unable to leave the island on time.

The Tourism Development Strategy report prepared by Llewellyn-Davies, Weeks Forestier, Walker and Bor includes some comments on occupancy. They found that hotel bed occupancy rates for 1970/71 averaged 19.6%, 23% when allowance was made for seasonal closures. Room occupancy rates are considered to be higher, around 30% and financial occupancy, which takes cognizance of the differences in tariffs between single and double occupancy, was calculated to be 28%.

TRINIDAD AND TOBAGO

Information received by the IBRD provides monthly room occupancy rates for some hotels in Trinidad and Tobago between 1969 and 1972.

Room occupancy statistics are available for about 40% of the island's hotel rooms (Tables 4.23 to 4.28). The figures show similar seasonal variations in other Caribbean islands.

The annual average occupancy rates of the 16 hotels for which room-night figures can be calculated are:

<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
73.2	57.0	56.3	47.8

Trinidad and Tobago achieved very high annual rates in 1969; since then, rates have declined substantially.

Hotel room occupancy rates by size of hotel show no definite trends or differences between the various groups:

No. of hotels in sample	Size of hotel (rooms)	Annual Average Room Occupancy Rates			
		1969	1970	1971	1972
5	10 - 24	51.9	52.2	62.8	49.8
2	25 - 49	56.4	45.6	59.2	61.5
6	50 - 99	65.6	55.1	64.5	40.8
2	100 -199	57.9	48.3	60.3	64.9
1	200+	73.2	57.0	56.3	47.8

Table 4.23

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>Farrell House</u>				<u>Tropical</u>			<u>Robinson Crusoe</u>			
	1969	1970	1971	1972	1970	1971	1972	1969	1970	1971	1972
January	30.0	55.0	100	30.91	70.0			49.4	48.2	32.9	48.6
February	34.1	33.0	100	29.45	90.0		NA	81.9	83.9	55.5	51.7
March	54.0	38.0	100	38.70	20.0			57.3	55.5	39.7	62.4
April	39.0	27.0	100	35.0	20.0			38.1	25.7	50.3	44.9
May	25.0	100	100	15.86	10.0	NA		48.8	35.6	79.5	54.4
June	49.0	100	100	45.0	NA		45.0	21.7	35.6	66.4	32.7
July	35.0	100	100	33.0	NA		53.0	46.3	49.6	66.6	44.7
August	18.0	100	100	36.0	NA		53.0	70.4	66.5	75.9	57.0
September	30.0	100	100	41.0	22.4			16.0	37.8	52.4	43.5
October	46.0	100	45.0	35.0	40.3			24.2	26.5	36.1	46.5
November	70.0	100	40.0	NA	NA			51.9	48.2	62.6	58.9
December	74.0	100	70.1	NA	NA			43.6	40.4	46.6	52.5
Annual average	42.0	79.5	87.9	NA	NA	NA	NA	45.4	49.4	63.3	41.5
Rooms/ beds	11	11	11	11	12	12	12	15	15	15	15
Room/ bed nights available	4,015	4,015	4,015	4,026				5,475	5,475	5,475	5,490
Room/ bed nights sold	1,686	3,192	3,529	NA				2,486	2,705	3,466	2,278

Table 4.24

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>Mt. Irvine Bay</u>				<u>Crown Point</u>				<u>Queen's Park</u>			
	1969	1970	1971	1972	1969	1970	1971	1972	1969	1970	1971	1972
January	NA	73.2	61.1	38.2	70.5	60.0	37.9	54.4	73.3	71.5	68.0	74.0
February	14.2	86.8	78.4	54.8	84.2	86.0	71.0	60.4	81.0	83.3	82.2	69.0
March	62.1	83.7	81.9	42.3	82.6	81.9	56.3	40.5	76.3	81.0	83.0	72.6
April	14.2	21.0	46.0	21.0	66.1	27.6	47.3	41.9	73.4	62.5	80.0	68.0
May	22.6	19.0	33.8	26.7	58.6	22.1	35.2	38.0	56.7	42.0	72.0	70.0
June	6.5	12.0	21.3	13.6	38.8	20.0	33.3	20.5	76.0	50.0	63.0	54.0
July	8.3	29.0	51.9	17.2	55.2	38.1	43.1	27.6	66.0	53.0	61.0	67.0
August	18.8	57.0	57.1	35.9	76.5	53.9	64.4	42.8	56.0	70.0	62.0	61.0
September	11.4	25.3	32.0	27.3	36.6	18.2	33.2	35.2	57.0	65.0	61.0	72.0
October	20.1	22.0	48.0	34.0	38.0	22.6	37.0	32.9	71.4	55.2	71.0	56.0
November	57.7	43.0	NA	42.2	68.4	44.5	54.9	53.7	74.0	57.0	65.0	64.0
December	51.6	45.0	95.0	43.1	56.3	55.9	57.2	47.4	61.5	55.0	59.0	51.0
Annual average	NA	43.0	NA	31.4	61.1	42.7	47.7	41.3	68.5	62.1	68.9	64.9
Rooms / beds	79	79	79	79	80	80	80	80	100	100	100	100
Room / bed nights available	28,835	28,835	28,835	28,914	29,200	29,200	20,200	29,280	36,500	36,500	36,500	36,600
Room / bed nights sold	NA	12,399	NA	9,079	17,841	12,468	13,928	12,093	25,003	22,667	25,149	23,753

Table 4.25

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>Turtle Beach</u>			<u>Normandie</u>				<u>Bel Air</u>			
	1970	1971	1972	1969	1970	1971	1972	1969	1970	1971	1972
January	NA	20.1	60.0	63.1	61.2	50.7	52.9	74.4	75.1	60.5	57.5
February	NA	70.1	71.0	86.5	85.8	64.5	53.3	92.6	93.0	80.2	50.9
March	NA	37.2	64.0	76.9	67.5	45.7	47.9	79.3	78.8	73.0	37.7
April	NA	38.5	51.0	48.2	43.1	53.7	41.6	69.9	76.4	66.0	40.4
May	NA	20.5	52.0	49.1	28.6	66.4	58.7	60.0	85.0	63.1	26.6
June	NA	25.5	39.4	77.1	30.8	61.9	36.8	75.3	74.1	56.6	33.4
July	NA	25.1	53.5	44.6	39.0	61.0	58.7	64.4	70.4	64.1	41.6
August	NA	44.4	70.8	54.2	44.7	75.4	56.7	74.3	75.5	69.9	54.4
September	18.2	19.6	NA	34.7	40.8	59.6	51.5	56.7	63.7	52.0	47.0
October	7.0	37.7	43.7	57.5	53.9	65.0	56.7	71.6	52.0	47.1	47.1
November	21.2	48.3	77.4	83.1	62.5	52.5	50.8	88.2	49.2	45.8	33.9
December	20.6	48.2	59.8	56.1	59.7	46.6	35.8	70.6	56.1	52.0	46.2
Annual average	NA	35.4	31.2	50.9	51.4	58.6	51.2	73.1	70.8	60.6	43.7
Rooms/ beds	52	52	52	60	60	60	60	63	63	63	63
Room/ bed nights available	18,980	18,980	19,032	21,900	21,900	21,900	21,960	22,995	22,995	22,995	23,058
Room/ bed nights sold	NA	6,719	5,938	11,147	11,257	12,833	11,244	16,809	16,280	13,935	10,076

Table 4.26

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>E.J. Lau Hotel</u>				<u>Chaconia Inn</u>				<u>Castle Cove</u>		<u>Bacolet</u>		
	1969	1970	1971	1972	1969	1970	1971	1972	1969	1970	1969	1970	1971
January	24.9	46.4	63.1	27.3	N.A.	69.4	52.0	95.0	60.0	N.A.	49.4	54.3	38.5
February	76.3	63.2	47.5	23.1	N.A.	90.7	60.7	98.2	80.0	Closed	61.0	89.4	65.5
March	40.7	34.1	37.6	32.0	N.A.	81.7	55.5	96.0	60.0	Closed	51.3	63.5	42.8
April	29.4	55.1	38.1	38.2	76.4	61.5	90.0	85.0	40.0	Closed	41.1	26.3	Closed
May	27.2	23.5	37.6	29.4	85.0	40.9	80.8	88.0	15.0	Closed	41.1	19.0	Closed
June	52.0	31.3	42.6	25.3	74.1	40.4	95.5	68.0	15.0	Closed	31.0	Closed	Closed
July	41.2	40.9	52.9	31.3	69.8	44.8	87.3	60.0	25.0	70.0	31.0	36.0	Closed
August	60.5	46.5	50.5	24.1	65.5	44.1	84.2	75.6	60.0	38.7	45.0	80.0	Closed
September	41.8	32.4	51.6	39.0	55.0	46.6	83.0	70.0	N.A.	31.0	80.0	24.0	Closed
October	31.1	36.2	38.4	17.5	92.8	66.1	95.3	63.0	N.A.	N.A.	80.0	32.0	Closed
November	51.5	42.4	32.9	22.9	83.9	65.9	95.7	70.0	N.A.	N.A.	69.8	29.4	Closed
December	48.0	33.9	36.2	22.5	43.6	40.5	92.7	62.2	N.A.	N.A.	40.5	37.5	Closed
Annual average	43.7	40.5	44.3	27.7	71.2	57.8	81.0	77.6	N.A.	N.A.	51.7	44.7	48.7
Rooms/beds	17	17	17	17	18	18	18	18	20	20	21	21	21
Room/bed nights available	6,205	6,205	6,205	6,222	6,570	6,570	6,570	6,588			7,665	7,665	7,665
Room/bed nights sold	2,712	2,513	2,749	1,723	4,678	3,797	5,322	5,112			3,963	3,426	3,733

Table 4.27

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>Crown Reef</u>				<u>Trinidad Hilton</u>			
	1969	1970	1971	1972	1969	1970	1971	1972
January	75.6	53.8	28.0	22.0	73.1	85.0	73.5	54.4
February	77.4	78.0	48.0	37.3	95.4	96.6	89.3	53.8
March	55.5	64.5	63.0	20.7	86.4	84.6	63.6	52.3
April	40.3	26.9	63.0	18.4	80.2	62.3	58.2	47.3
May	21.4	23.5	50.0	21.0	69.6	38.2	48.3	44.3
June	34.6	35.5	25.2	21.0	92.7	39.3	49.7	38.0
July	42.9	80.4	50.0	45.0	71.0	54.5	44.9	44.9
August	78.6	43.1	71.4	59.0	81.7	62.6	43.6	45.6
September	41.5	21.5	31.4	N.A.	62.1	58.9	40.5	39.5
October	35.7	17.6	48.0	N.A.	89.4	62.4	44.1	53.4
November	30.2	14.0	87.1	N.A.	93.8	77.6	61.8	55.1
December	48.8	32.6	68.3	N.A.	76.2	62.1	56.8	43.2
Annual average	48.6	36.3	52.8	N.A.	89.9	65.4	55.7	47.6
Rooms / beds	115	115	115	115	442	442	442	442
Room / bed nights available	41,975	41,975	41,975	41,975	161,330	161,330	161,330	161,772
Room / bed nights sold	20,400	15,237	22,163	N.A.	145,035	105,510	89,861	77,003

Table 4.28

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>Arnos Vale</u>				<u>Kapok</u>			<u>Pan American</u>			
	1969	1970	1971	1972	1970	1971	1972	1969	1970	1971	1972
January	84.0	93.2	74.0	75.0	N.A.	40.9	86.0	97.0	94.7	83.4	60.7
February	91.8	94.1	88.7	83.5	89.0	76.5	75.6	98.9	97.0	88.1	48.1
March	93.0	91.4	87.8	78.0	51.0	54.9	74.1	80.2	97.0	75.7	49.5
April	68.0	68.0	62.0	46.0	N.A.	43.8	75.8	81.4	72.0	74.4	51.1
May	38.0	20.6	24.4	21.4	N.A.	4.44	58.2	84.1	66.9	44.3	49.9
June	30.0	21.0	18.8	17.3	47.3	67.0	48.5	90.0	75.8	47.5	55.6
July	35.0	29.1	34.2	19.2	43.0	71.0	59.1	90.2	76.3	53.6	49.0
August	37.3	41.4	34.2	29.7	51.0	78.7	53.2	79.8	75.9	55.5	59.2
September	closed	24.8	9.5	17.6	41.2	78.7	60.3	88.0	73.4	51.8	50.0
October	18.0	28.3	21.9	20.0	44.4	89.3	59.3	88.0	64.3	37.9	46.5
November	65.8	57.0	68.7	46.2	43.4	87.8	61.1	90.4	76.0	39.3	36.5
December	71.8	56.1	57.0	50.5	44.0	63.4	41.7	81.0	73.0	40.6	32.8
Annual average	56.4	52.0	47.7	40.5	41.3	66.8	62.7	81.1	74.0	57.7	40.6
Rooms beds	27	27	27	27	41	41	41	50	50	50	50
Room bed nights available	9,855	9,855	9,855	9,882	14,970	14,970	15,009	15,250	15,250	15,250	15,300
Room / bed nights sold	5,558	5,125	4,701	4,002	6,183	10,000	11,302	14,800	14,478	13,530	8,990

Table 4.29

TRINIDAD AND TOBAGO - Room Occupancy Rates in Individual Hotels, by Month

	<u>Chagacabana</u>		<u>Bluehaven</u>			<u>Shorelands</u>	
	<u>1970</u>	<u>1971</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1969</u>	<u>1970</u>
January	NA	47.9	71.7	68.5	44.0	74.3	25.4
February	NA	31.0	94.3	94.2	71.2	117.2	37.0
March	25.8	18.0	92.8	79.9	58.5	109.8	10.9
April	16.5	21.0	50.6	23.3	closed	53.7	7.6
May	24.1	NA	50.6	closed	closed	50.0	NA
June	39.4	NA	14.0	26.4	closed	32.0	NA
July	30.3	NA	14.0	35.3	closed	38.4	NA
August	52.7	NA	27.3	40.0	closed	46.8	NA
September	87.4	closed	41.0	33.0	closed	88.8	NA
October	93.5	closed	24.5	21.0	closed	12.7	14.6
November	78.1	closed	69.0	27.6	closed	48.2	closed
December	55.5	closed	61.0	42.1	closed	54.0	closed
Annual average	51.3	NA	50.9	44.7	NA	61.3	NA
Rooms/beds	NA	NA	NA	NA	NA	NA	NA

TURKS AND CAICOS ISLANDS

Statistics relating to hotel occupancy rates are not available. At present, the Islands receive fewer than 5,000 visitors annually, the majority of them business visitors and friends or relatives of local residents. Therefore, monthly rates are unlikely to be susceptible to fluctuations in the traditional Caribbean Tourist Season.

U.S. VIRGIN ISLANDS

Occupancy rates were obtained from the Hotels' Association for the island of St. Croix only. The Hotel Association comments that comparable rates for St. Thomas would probably be higher on average. The statistics for St. Croix give monthly room occupancy rates from January 1969 to January 1973 for some 1,200 hotel rooms (Table 4.31). This is more than 100% of the total number of rooms included in the rates sheets.

Hotels with beaches are reported to have experienced higher room occupancy rates for the month of January than those without.

TABLE 4.30: ST. CROIX - ROOM OCCUPANCY RATES

January	Hotels with beaches	Hotels without beaches
1969	89.1	65.2
1970	72.8	59.5
1971	56.2	47.1
1972	65.0	47.5
1973	44.2	38.2

Annual room occupancy rates fell between 1969 and 1971, from 62.5% to 48.9%, but improved to 52.7% in 1972. There was a 19% decline overall in average annual occupancy rates between 1969 and 1972.

Monthly occupancy in 1969 was fairly stable between April and December (except for September), with high rates from January to March. In 1972, the February-March peak was more obvious, as occupancy rates in those months had declined by only 14% since 1969; the September-October trough was noticeable, as rates had fallen 29%; and the summer peak was distinctive, showing an 8% fall in July-August rates between 1969 and 1972. Therefore, monthly occupancy rates seem to have diverged more since 1969, with seasonal differences more apparent now.

Table 4.31

U.S. Virgin Islands - Room Occupancy Rates
in St. Croix Hotels, by Month

	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
January	78.0	61.2	51.8	57.7	42.5
February	93.1	84.8	73.5	80.7	
March	82.3	73.7	58.2	72.6	
April	68.1	44.0	49.7	64.1	
May	56.1	38.6	37.9	47.7	
June	53.7	37.0	31.7	43.8	
July	62.2	39.4	38.7	52.1	
August	54.3	39.1	47.5	55.2	
September	36.8	30.0	34.6	31.2	
October	43.6	28.5	38.8	30.9	
November	59.9	42.2	64.8	47.4	
December	63.4	52.6	62.4	48.9	
Annual average	62.5	50.2	48.9	52.7	-
Rooms/ beds					1,200
Room/ bed nights available					35,482
Room/ bed nights sold					15,095

PART II: THE INDIVIDUAL ISLANDS

CHAPTER 5. DIRECT EMPLOYMENT EFFECTS OF TOURIST ACCOMMODATION, WAGE STRUCTURE
AMONG HOTEL EMPLOYEES AND IMPRESSIONS OF UNIONIZATION

ANTIGUA

Employment

The Labor Commission's 1970 and 1971 reports provide the only estimates for employment in hotels and guest houses. The decline between 1970 and 1971 may be explained partly by a fall in occupancy rates, but the difference between the two figures is so great that the reliability of the data must be questioned.

Information was collected independently for a sample of nine hotels that varied in size and category and contained 391 rooms or 34% of the island's total. Some 488 persons were employed in these hotels in the peak season, giving employee-per-room ratios of 1.25:1 (falling to 0.86:1 in the slack season). Ratios implicit in the Labor Commission's figures are 1.17:1 in 1970 and 0.72:1 in 1971. The 1971 figure seems so low that it may result from undercounting. Seasonal variations in employment are very significant in Antigua. More than 30% of staff are laid off in the slack season and a number of hotels close completely for part of the year.

Foreign workers

Foreign staff are concentrated in management positions and most hotel managers in Antigua are foreigners. The Government is now giving encouragement to the training of local personnel for management positions.

Earnings

Agreements between the Hotel Association and the Antigua Workers' Union include minimum wage rates for various categories of hotel worker. All but three hotels, which are not members of the Association, are covered by the minimum wage rates. Minimum rates are established separately for the three categories of hotel, Category 'A' being 20% higher than Category 'C' hotels. Weekly wages are computed for between 36 and 48 hours' work. Antigua's minimum wage rates for category 'A' hotels seem average for the eastern Caribbean, paralleling average earnings in Trinidad and Tobago, and St. Lucia. Wages, particularly in the lower paid occupations, are higher than those in the neighboring islands of St. Kitts and Montserrat.

Minimum wage rates were raised uniformly by 7-1/2% in November 1971 from those agreed in January 1970, and were again increased in July 1973 by 6%. Consequently, 1973 wage rates are 17% higher than 1970.

Unionization

The island has two unions: the Antigua Trades and Labor Union established in 1939, and the Antigua Workers' Union established in 1967. Originally, the Trades and Labor Union represented hotel workers, but more recently the Workers' Union has played this role.

Training

A Hotel and Catering School, equipped by the UNDP, was opened in 1955, and operated by an ILO advisor until 1971. Some 400 persons received basic training as chambermaids, waiters, bartenders, bellboys and other hotel employees during that period.

Antigua has been mentioned as a possible headquarters for an ILO-sponsored training center serving the Caribbean region and offering training at all levels in all aspects of the hotel and catering industry.

THE BAHAMAS

Employment

There are no precise figures as to the number of people currently engaged in the hotel and catering industry. The Hotel Employers' Association estimates that between 10,000 and 11,000 persons work in hotels and tourist accommodation, and that employee-per-room ratios range between 1.10 and 1.15 persons per room. The Association believes there has been no change in the ratio over the last three years, and comments there is no evidence of increasing efficiency. The industry employs a large number of unskilled workers whose productivity is difficult to improve because of their lack of a basic education.

Seasonal variations in occupancy cause hotels to lay off staff in May and June and between September and November. Hotels generally rotate redundant staff. The Bahamas has aimed at promoting summer business over the last six years by offering lower rates and establishing a midsummer festival entitled "Goombay". Results have been reasonably favorable, but the autumn trough remains.

Foreign Workers

The Nassau/Paradise Island Board reports that expatriate staff in its 27 member hotels comprised 18% in 1967, compared with 3% in 1973. This reflects the general government policy to reduce non-Bahamian employment.

Earnings

Minimum wage rates agreed between the Hotel Employers' Association and the Hotel and Catering Workers' Union in January 1972 are the best indicators of earnings in The Bahamas, but apply to New Providence and Paradise Island hotels only, where wages are likely to be higher than average.

The Employers' Association considers that most employees are paid more than the minimum rates, an exception being waiters and maids, who supplement their wages with tips. Wages vary greatly among hotels, since duties associated with particular jobs differ so that average earnings cannot be estimated from the minimum wage rates.

Minimum wage rates in the Bahamas are high compared with most other Caribbean Islands. Wage rates in Barbados are less than half those in the Bahamas in all occupational categories. Average earnings are slightly higher in the U.S. Virgin Islands implying that real earnings are similarly higher. Bermuda's minimum wage rates are generally 15-20% higher than those of the Bahamas and indications are that Puerto Rico may also offer higher average earnings.

Unionization

Trade union organization in The Bahamas follows British traditions. The Hotel and Catering Workers' Union has been recognized since 1958.

Training

Dissatisfaction with the capability of the hotel training college in Nassau to meet the needs of the industry has long been felt. A Tripartite Training Council was recently established by the Government, the hotel industry and the trade union to finance and carry out the upgrading of the college. A UN advisor has been appointed. The college will concentrate on three major problems: retraining; career development, and attracting persons with a good basic education; and the promotion of Bahamian employment. In future, the policy will be to maximize local training opportunities.

BARBADOS

The census conducted in April 1970 indicated that 4,069 persons were employed in hotels and guest houses, implying a very high employee-per-room ratio of 1.83 persons per room. The high labor intensity of Barbados' hotel industry may be related to the predominance of small hotels. The census definition of hotel and guest house workers is not known, but it could be that part-time and peak season workers, for example, are included.

Additional information was obtained from a report to the Ministry of Tourism by C. Crocco, a technical expert appointed by CIDA who conducted a survey of 85 hotels, guest houses and apartment hotels in 1971 and 1972. His results indicate about 1,000 workers less than the census recorded, in an equivalent number of rooms, with an average employee-per-room ratio of 1.3.

Type of Accommodation	Rentable Units	Employed Dec. 1971	Employee room
Luxury hotels	1,100	1,946	1.77
Class 'A' hotels	308	442	1.44
Class 'B' hotels	206	166	0.81
Class 'C' hotels	10	23	2.30
Apartment hotels	595	379	0.64
Guest houses	<u>101</u>	<u>50</u>	<u>0.50</u>
TOTAL	2,320	3,006	1.30

The results indicate much higher employee per room ratios in luxury and 'A' class hotels than in 'B' class hotels, guest houses and apartment hotels. Clearly, apartment hotels, offering fewer services than a conventional hotel, might be expected to employ fewer people. Luxury hotels tend to be more labor intensive than cheap hotels. In Barbados, the pattern could partly reflect better service in more expensive hotels, as well as the higher turnover of guests indicated by the higher occupancy rates in luxury hotels.

Crocco's figures suggest that Barbados hotels experience greater fluctuations in employment than any other Caribbean island, except perhaps St. Lucia, where the statistical data is suspect. The luxury and 'A' class hotels, which generally employ more staff per room, are more likely to lay off staff in the slack season.

Type of Accommodation	Number Employed		Ratio of peak- to off-season employment
	Sept. 1971	Feb. 1971	
Luxury hotels	1,230	2,199	1.79:1.00
'A' Class hotels	290	459	1.58:1.00
'B' Class hotels	116	131	1.13:1.00
'C' Class hotels	24	22	0.92:1.00
Apartment hotels	324	396	1.22:1.00
Guest houses	46	55	1.20:1.00

Two thirds of the hotels lay off staff in summer; the majority prefer to maintain a rotation system or to keep staff on short time rather than to release workers completely.

Earnings

Basic rates of pay are agreed between the Barbados Employers' Confederation and the Barbados Workers' Union for the different categories of hotel. Rates agreed in December 1971 are now being renegotiated. The Hotel Association estimates that between 83% and 90% of hotels are covered by the agreement. The minimum wage rates in Barbados seem to be higher than rates for comparable years in Antigua and more than average earnings in Trinidad and Tobago. Though relatively high in the context of the eastern Caribbean, hotel workers' wages are not of the same order as those on islands with established tourism industries, such as The Bahamas, Bermuda or Puerto Rico, which lie closer to the U.S. mainland. Basic wages were raised by between 6% and 10% in 1971, but have not changed since then.

About 95% of apartment, luxury and 'A' class hotels and 90% of 'B' class hotels and guest houses, impose a 10% service charge which, in accordance with an agreement between the Employers' Confederation and Workers' Union, is distributed according to a points system.

Unionization

Some 80% of tourist accommodation units are represented by the Barbados Workers' Union. A few small establishments and apartments are excluded. Agreements made with the Employers' Confederation do not cover such senior positions as head cooks and bartenders, accountants and receptionists, as in other islands.

Training

Barbados has been mentioned as a possible location for a regional training center for all categories of hotel and tourism workers in the Caribbean.

The Doxey report 1/ made the following observations about staff training, based on interviews with management and staff of hotels in Barbados. Managements considered that the prerequisites for senior staff were experience, a formal basic training in all aspects of management, and leadership/integrity qualities. Two thirds of managers preferred to train their own management personnel because of the difficulties in obtaining qualified staff.

1/ Doxey, George V., & Associates, THE TOURIST INDUSTRY IN BARBADOS - A Socio-Economic Assessment (Dusco Graphics Ltd., Kitchener, Ontario, Canada, c. 1970)

BERMUDA

Employment

Direct employment in hotels is recorded annually by the Hotel Association. All categories of tourist accommodation are represented in the Association's membership but the majority of establishments are hotels. Employment increased annually to 1971, fell in 1972, and increased fairly substantially in 1973. Nevertheless, employee per room ratios have declined slightly since 1968, from 1.19:1 to 1.14:1, which could be explained by the fall in hotel occupancy rates or by increasing productivity among workers.

An agreement between the trade union representing hotel workers and the Hotel Employers' Federation provides that lay-offs, when necessary, will be made through a rotation system.

Foreign Workers

The proportion of foreign workers in hotel and tourist accommodation is high and has risen annually since 1970, reflecting a generally high demand for labour in the island. Full employment situation has been partly responsible for formulating the government's policy of restraint on new hotel construction.

Foreign workers as % of all
workers in tourist accommodation

1968	37.1%
1969	45.2
1970	37.3
1971	39.3
1972	40.3
1973	41.8

Earnings

Minimum wage rates are agreed between the Federation of Hotel Employers and the Industrial Union and appear to be the highest minimum wages in the Caribbean region, although earnings in Puerto Rico, for which information is incomplete, may be as high or higher. The Federation of Hotel Employers comments that minimum wage rates are usually supplemented by an additional \$10-25 per week. The agreement between employers and employees requires that the entire

service charge or gratuity received by a hotel shall be distributed weekly among the staff. Hotels may distribute gratuities according to the system they prefer. Minimum wage rates increased by between 8% and 16% from 1970 to 1972 and were under renegotiation in May 1973.

Unionization

The Bermuda Industrial Union covers all tourism related workers. It appears to be well organized and effective in negotiations and has a large membership.

BRITISH VIRGIN ISLANDS

Employment

The only figure for total employment in hotels and guest houses is from the labour force survey by Elkan and Morley, University of Durham, 1971: they found that some 371 persons were employed in 13 hotels and guest houses, which had 248 bedrooms. The overall employee-per-room ratio for the British Virgin Islands works out to 1.5:1.0, which is quite high and comparable to that reported for Barbados. The figure, however, masks the fact that one hotel is responsible for more than 50% of total employment in the sector. This hotel, which offers luxury accommodation and all-inclusive tourist facilities, has an employee-per-room ratio of 2.89:1.

Foreign workers

The Labour Office requests monthly employment information from hotels. The hotels are required under the Hotels' Aid Ordinance to specify the percentages of foreign and local workers. However, the information is incomplete, figures being available for three hotels only, and for different dates:

Hotel	Total Employed	British Virgin Islanders	Foreign	Date
No. 1	57	33	24	June 1972
	9	53	38	Nov. 1972
No. 2	189	129	59	July 1972
	189	129	59	Nov 1972
	225	152	73	March 1973
No. 3	67	57	10	Feb. 1970

Earnings

The British Virgin Island Hotel Association carried out a survey of wages and conditions among its member hotels towards the end of 1972. The number of responses (seven) was disappointing, but the Association felt the results were useful. Completed surveys were received from five hotels of differing sizes, one single boat operation and one condominium, offering 451 beds or berths and employing 271 persons.

The range in basic weekly wages in the British Virgin Islands is wide, e.g. chambermaids' earnings vary between \$17.50 and \$39.10 per week, which probably reflects the high proportion of expatriate staff, who command high salaries in some hotel jobs; more significant is the variety of types of tourist accommodation offered and the resulting differences in responsibilities.

Basic wages in the British Virgin Islands are higher than in the Eastern Caribbean. As there are only minimum wage figures available for Barbados direct comparisons are not possible, but the British Virgin Islands seem to pay higher wages. Earnings are certainly better than in the neighbouring territory of St. Kitts-Nevis. Nevertheless, the British Virgin Islands cannot compete with wages in the U.S. Virgin Islands, except for kitchen staff.

Benefits and gratuities augment the salaries of most categories of workers, particularly those of head barmen, maids, cooks and assistant cooks.

<u>Category</u>	<u>Basic hourly average</u>	<u>Total hourly average</u>
Asst. managers	3.25	3.34
Cocktail and head barmen	.87	1.37
Room maids	.65	1.00
Chefs or head cooks	2.79	3.11
Assistant cooks	.99	1.28
Clerks/receptionists	1.51	1.65
Laundry maids	.88	1.04
Gardener/groundsmen	1.07	1.07
Maintenance/handyman	1.30	1.48

Unionization

Unionization is in its infancy among hotel workers in the British Virgin Islands. In 1973 a trade union was established by workers at two hotels, which as yet is primarily concerned with recruitment.

Training

The Hotel Association's survey of hotel employment indicated that only four persons were undergoing training (two supervisory/management trainees and two tradesmen). Only "on-the-job" training is available in the British Virgin Islands.

CAYMAN ISLANDS

Employment

The Tourist Board provided figures for employment in 321 of the islands' 385 hotel rooms. In September 1972, some 260 persons were employed, indicating a low average employee-per-room ratio of 0.81:1. September is one of the slackest months for tourist arrivals, which may partly account for the low ratio, as hotels may have laid off some staff. It is also probably relevant that the Cayman Islands are characterized by nearly full employment. There are no earlier figures with which to compare 1972 employee-per-room ratios, but the Tourist Board indicates no evidence of increased efficiency or changes in employee-per-room ratios over time. Because the men generally work at sea, many women are employed in hotels.

Foreign workers

There are no statistics relating to the proportion of foreign workers engaged in the hotel and tourist industry. Holiday Inn, which probably employs the most, has no more than 10% foreign workers. However, foreigners tend to occupy more influential and better paid positions, such as Maitre d', chef, or bar manager.

Earnings

Information about wage rates is limited to estimates of average earnings in two hotels. Wages in the first small hotel are lower than in the second, a sizeable establishment located on the popular seven-mile beach. Hoteliers at both establishments remarked that wages had increased substantially (between 50% and 100%) in the previous three years.

Earnings in the Cayman Islands seem to be higher than in the Eastern Caribbean. Wages here, like those in the British Virgin Islands, might be classified as halfway between those in the eastern Caribbean and those in the northerly, more developed islands.

All but two hotels assess a service charge in lieu of tips, ranging from 7-1/2% to 15%. One or two hotels may retain a proportion of the gratuity for breakages, administration and the like, but this is not the usual practice. Each hotel has its own system for distributing the service charge among employees, seniority and performance during the week being common criteria for a higher share.

Unionization

The only existing trade union is the Seaman's Union.

DOMINICA

Employment

The Government publication to mark the fifth anniversary of Associated Statehood, in 1972, reported that the island's eight operational hotels contained 136 rooms and gave employment to 162 persons, which indicates an employee-per-room ratio of 1.19:1, which is probably close to the average for the Caribbean Islands and is slightly higher than ratios in The Bahamas, Jamaica and Bermuda.

Foreign Workers

In November 1972, only two hotel workers were not Dominica nationals. Foreign workers thus comprise about 1% of the total.

Earnings

The Dominica Amalgamated Workers Union represents hotel workers. Minimum wage rates for 1972 and 1973 are available. Agreed wage rates in Dominica are low when compared with the other Caribbean Islands, and even when compared with some eastern islands. Minimum wages are lower than those in Antigua, and actual earnings are probably similar to those in St. Vincent and St. Lucia.

Unionization

There is no trade union catering especially to hotel workers. The Dominica Amalgamated Workers Union represents some hotel employees.

GRENADA

Employment

The Ministry of Housing gave estimates of employment in each tourist accommodation establishment. The Ministry of Housing data indicate a very low employee-per-room ratio, with a total of 370 workers in 766 rooms. The industry in Grenada may not be very labour intensive, especially as most hotels are small and are operated as family businesses. Nevertheless there are many luxury hotels, and experience in other islands suggests that these are often more labour intensive. The ratio obtained for guest houses is substantially lower than in Montserrat, Dominica, or the British Virgin Islands, and it thus seems that the figures for Grenada require corroboration.

Earnings

No information was received about wage levels. The general practice is to divide a 10% service charge on guest bills among the staff. Larger hotels have a points system for distribution and the smaller ones use their own discretion, taking account of seniority and other such factors.

Unionization

Nearly all hotel workers are unionized, being members of the Grenada Manual and Metal Workers' Union.

HAITI

Employment

The information in the publication "Developpement du Tourisme du Haiti" indicates approximately 900 jobs in Haitian hotels. There are 775 hotel rooms, which implies an employee-per-room ratio of 1.16:1. Elsewhere, the report includes a statement to the effect that employee-per-room ratios could rise from the existing 0.8 persons per room to 1.6 or even 3.0 persons. A figure of 1.2 is adopted in the 10 year development plan forecasts.

The report does not discuss wage rates, foreign employment in hotels or unionization.

JAMAICA

Employment

The Tourist Board gave estimates of direct employment in tourist accommodation for 1971 and 1972 in its Annual Report for 1972. These suggest employee-per-room ratios of 1.16:1 and 1.05:1 respectively. These ratios are similar to those for other Caribbean Islands with well-developed tourism sectors, such as Bermuda, the Bahamas and Puerto Rico. Earlier data relating to employee-per-room ratios are available from a survey of hotels carried out by the Central Planning Unit in 1969. The survey gives hotel ratios only and these are higher than ratios for all tourist accommodation two and three years later. The Central Planning Unit found that employee-per-room ratios increased with the size of hotel.

Size of Hotel, 1969	Employee-per-room Ratio
10-49 rooms	1.6:1
50-99 rooms	2.0:1
100+ rooms	2.08:1

The results of a survey among members of the Jamaica Hotel and Tourist Association in 1968 implied employee-per-room ratios in hotels similar to those recorded by the Central Planning Unit in 1969. The JHTA survey revealed a substantial variation in ratios between the peak and summer seasons, from 1.92:1 to 1.42:1.

The conclusions from the various fragments of information are that employee ratios in guest houses, cottages and apartments are lower than those in hotels. Increased productivity could account for the lower employee-per-room ratio since 1968 but, more probably, the reduction is due to falling occupancy rates and to the growth of self-catering accommodation.

Foreign Workers

Statistics on foreign workers are provided by members of the JHTA only during the years 1967 and 1968. At that time, foreign workers in hotels accounted for less than 2% of all workers. It is unlikely that the proportion has increased since 1968, as Jamaica has continued to have a large pool of unemployed. Restrictions on work permits have been tightened in recent years and training schemes for Jamaicans extended.

Earnings

Estimates compiled from JHTA figures for January 1970 reveal that earnings in Jamaica that year were more like those in the eastern Caribbean, than those in the more highly paid islands to the north (The Bahamas and Puerto Rico). Earnings show a broader range than for some islands, probably reflecting the wider range of tourist accommodation in Jamaica.

Jamaican wages are comparable with wages in Barbados and Trinidad/Tobago in 1970/71. Unfortunately the lack of statistics for 1972/73 renders it impossible to measure the effect of the floating of the Jamaican dollar and price inflation on earnings in the hotel sector.

MONTSERRAT

Employment

An interview survey by research workers from the University of Calgary, Canada in June 1973 found that 146 persons were employed during the peak season in Montserrat's hotels and guest houses. Average employee-per-room ratios (1.33:1) are high, particularly in guest houses (1.71:1). Seasonal variations in employment are severe and one third of the workers laid off in the slack season.

Earnings

The Labour Office provided figures for actual earnings in two hotels in 1971, commenting that wages probably had not changed in the subsequent two years. Montserrat seems to offer very low wages, comparable to neighbouring small islands like St. Kitts-Nevis, Dominica and St. Vincent. All hotels and guest houses levy a 10% service charge, all of which, except in the smaller establishments, is given to the staff.

Unionization

There is no unionization of hotel workers in Montserrat. In 1973, the Labour Office was revising the labour law and studying a recommendation to establish a minimum wage rate.

NETHERLANDS ANTILLES

Employment

The Department of Economic Development estimates that employment in the hotel sector in 1972 was 1,390 in the peak season and 1,240 in the slack season. The figures indicate high employee-per-room ratios, ranging between 1.29:1 and 1.44:1. Ratios are calculated separately for different categories of hotels and the results confirm the pattern demonstrated elsewhere, that luxury hotels employ more persons per room than do ordinary hotels:

move

	<u>1969</u>
<u>Category of Hotel</u>	<u>Employee-per-Room Ratio</u>
Luxury class	1.41
1st class	1.32
Commercial	0.43

Staff fluctuations are less than in other Caribbean Islands, with 90% of workers retaining their jobs throughout the year.

Earnings

According to the minimum wage law, hotel employees above the age of 21 have a guaranteed minimum wage of NAf 249 per month. In addition to this minimum, the hotels have a qualification system which is different for each hotel and wage rates vary according to the task performed. The minimum weekly wage in 1973 was approximately NAf 62, equivalent to US\$18 per week, and means that minimum earnings in the Netherlands Antilles are similar to those in Barbados.

Unionization

Approximately 75% of the hotel employees are affiliated to a union.

PUERTO RICO

Employment

The annual publication, "Selected Statistics of the Tourism Industry", published by the Tourism Development Company, includes a table showing employees in all hotels in each month of each year. The figures reveal that employment declined absolutely between 1969 and 1971, but regained the 1969 level in 1972. Employee-per-room ratios are worked out for June of each year and demonstrate a decline from 1.14:1 in 1968 to 1:1 in 1971, followed by an improvement to 1.06:1 in 1972. The changes are slight and falling hotel occupancy rates may be responsible for the trend. The annual ratios are similar to those for islands with similar levels of tourism development, such as Bermuda, The Bahamas and Jamaica. Seasonal variations in employment, like fluctuations in occupancy rates, are slight, with 90% of employees retaining their jobs throughout the year.

Earnings

Wage rates are high and are estimated to average \$2.25 per hour, with fringe benefits comprising as much as 30% of total earnings.

Minimum wage rates for large hotels are approximately \$1.60 per hour. In guest houses and small hotels with fewer than 75 rooms, typical earnings probably average \$1.50 per hour. Assuming an average work week of 44 hours, employees in large hotels would earn about \$90 and those in small hotels \$66. The federal minimum rate would imply average weekly earnings of about \$70, a figure comparable with minimum wages in Bermuda, the most highly paid territory for which detailed statistics are available.

Unionization

Approximately 95% of employees in hotels with more than 50 rooms are unionized and are represented by the Teamsters' Union.

ST. KITTS

Employment

Employment in hotels in St. Kitts-Nevis (excluding guest houses and hotels on the island of Anguilla) was reported (in the Department of Labour's 1971 Annual Report) to be 144. This figure, like the one obtained from the Labour Commission in Antigua, may be an understatement, because its accuracy depends upon a Labour Department survey of establishments that may not have elicited a 100% response rate. Moreover, the Labour Department's report is less concerned with the hotel and service industry than with the agricultural industry (particularly sugar). The monthly figures for hotel employment indicate seasonal variations less serious in volume than on such islands as Barbados, Antigua and Jamaica, where tourism is more developed.

The Labour Department's employment estimate for 1971 implies a very low employee-per-room ratio, equivalent to 0.64:1, varying from 0.56:1 to 0.72:1 throughout the year. Ratios for individual hotels can be quite low and are largely dependent upon occupancy rates. All hotels in St. Kitts-Nevis, with the exception of the Holiday Inn, are small and require small staffs when low or average occupancy rates are only maintained. For example, one hotel in Nevis, with 21 rooms, employed only seven persons in June 1973 (employee-per-room ratio 0.33:1). At the same time, another in St. Kitts, which achieves fairly high occupancy rates, engaged 25 staff to serve its eleven rooms (a ratio of 2.27:1). As long as occupancy rates fall short of 40%, full employment cannot be maintained in one major hotel and staff are laid off according to a rotation system. Therefore, although the Labour Department's figure for employment may be an underestimate, employee-per-room ratios are also low in circumstances of low occupancy rates and small hotels.

ST. LUCIA

Employment

In 1972, the St. Lucia Hotel Association estimated that 1,198 persons were employed in member hotels. Unfortunately, the number of rooms available in member hotels is not known.

The Labour Office undertook to investigate employment in a selection of hotels in June 1973. Peak and off-season figures were requested. Data received from eight hotels included all the large, modern hotels and three small ones with fewer than 50 rooms. Estimates of off-season employment are probably quite reliable, as information was collected during the slack season; but estimates for the peak season are so high that they are probably unrealistic.

Employee-per-room ratios for the off-season work out at 1.09:1 for the nine hotels, which is comparable to ratios on many other islands. The peak season estimate (1.95:1) is higher than on any other island, and implies enormous differences between summer and winter employment. If the slack season estimate is correct, 45% of staff are laid off at that time. Peak season employment ratios are therefore suspect.

Off-season employee-per-room ratios are calculated for hotel groups of different sizes. The results suggest no significant variation in ratios among hotels with fewer than 200 rooms. The largest hotel in St. Lucia has, however, an employee-per-room ratio of 1:1, compared with 1.13:1 in smaller hotels. This seems to suggest that economies of scale can be achieved when more than 200 rooms are built. Unfortunately, the hypothesis cannot be checked against data from other islands, except for the U.S. Virgin Islands, where ratios begin to fall in hotels with more than 100 rooms.

Foreign Workers

The Hotels Association noted that of 1,198 persons employed in member hotels in March 1972, 1,137 (95%) were St. Lucians. Foreign workers numbered 61, of whom 9 (1%) were West Indians and 52 (4%) were expatriates.

Earnings

Estimates of typical earnings are derived from records of the average wage rates for a recently opened large hotel and the minimum agreed rates for a much older establishment. The two wage scales are considered to be representative of the high and low ends of earnings in the hotel industry. Agreed earnings at the older hotel are similar to the negotiated wage rates at a similar hotel in Dominica, which is considered to be typical of the smaller, less developed (in terms of tourism) islands in the eastern Caribbean. Earnings at the newer hotel in St. Lucia are more in line with agreed wage rates for 'A' and 'B' category hotels in Barbados. Generally, hotels adopt a service charge system and distribute all or almost all the money received among employees on a points basis.

Unionization

In older hotels, workers have made their agreements with the St. Lucia Workers' Union, but most other workers in the comparatively new hotels are not yet organized. Unions play an active role in the construction industry, but are not yet influential in hotels.

ST. VINCENT

Employment

The St. Vincent Labour Department offered to carry out a series of enquiries by telephone to determine the numbers of persons employed in various hotels in January and June of 1973. Results obtained from 13 hotels representative of the hotel stock in St. Vincent indicate peak and off-season employment. The hotels contain 211 rooms and employ 207 workers in the peak and 161 in the off season. Employee-per-room ratios averaged 0.98:1 in January and 0.77:1 in June. Seasonal differences in employment are fairly low and similar to those on St. Kitts-Nevis, with about 23% of hotel staff redundant in the slack season.

Earnings

Minimum wages established by the trade union are slightly higher than those agreed for Dominica and for the older hotel in St. Lucia but lower than those for Barbados, St. Vincent's more successful neighbour. A luxury hotel, is reputed to pay high average wages of between US\$30 and \$100 per week, but only for six months of the year. However, in the majority of hotels, the agreed wage rates are probably not exceeded.

Unionization

Five hotels are unionized, but only two have secured agreements with their employers on wages and working conditions. Trade unions are less successful in the hotel sector than in other industries.

TRINIDAD AND TOBAGO

Employment

There is no information relating to direct employment in Trinidad and Tobago's hotels.

Earnings

Data received from five hotels gave wage rates for various categories of worker. Earnings seem to be higher than in such small eastern Caribbean Islands as St. Lucia or Dominica, but not as high as in Barbados. Antigua's minimum agreed wage rates seem most like those of Trinidad and Tobago.

Wages at a major hotel rose by between 35% and 55% in the three years 1970 to 1973. Earnings in other hotels increased by 10-30% between 1970 and 1972, and further increases of 20% (or US\$2.50 per week) were being negotiated for 1973.

TURKS AND CAICOS ISLANDS

Employment

The only year for which information on employment in hotels and guest houses is available is 1971, when Shankland Cox Partnership conducted planning and development studies. A survey of employment opportunities indicated that 40 persons were employed, and hence employment-per-room ratios amounted to 0.8:1. The figure is low and comparable with off-season ratios on such islands as St. Kitts-Nevis or St. Vincent, where accommodation is provided in very small establishments and average occupancy rates are below 30%.

Foreign Workers

There are no statistics indicating proportions of foreign and local workers in hotels and guest houses. However, all but one manager are expatriates. Also, there are a number of Haitians resident in the Islands, some of whom may be employed in hotels.

Earnings

Wage rates in the Turks and Caicos Islands are low, paralleling those of the small eastern Caribbean Islands rather than of the neighbouring Bahamas. Maids are estimated to earn US\$10 per week and cooks may earn a little more.

Unionization

Unionization is confined to the construction industry on South Caicos. Hoteliers usually hire their own staff without reference to the Labour Office.

U.S. VIRGIN ISLANDS

Employment

The Labour Office in the U.S. Virgin Islands lacks basic statistics, especially since the 1970 census was considered invalid. There have been many estimates of the total labour force and numbers employed in tourism, but these are generally considered unreliable. Estimates preferred by the Labour Office are those contained in the report "Annual Comprehensive Manpower Plan", published by the Virgin Islands Manpower Planning Council for Fiscal Year 1973.

HOTEL EMPLOYEES AS PART OF THE TOTAL LABOUR FORCE

	1971	1972	1973	1974	1975
Total employment	31,900	33,500	35,200	37,000	39,000
Hotels and restaurants	2,600	2,750	2,890	3,030	3,200

Since restaurant employees are included in these figures, it was not possible to calculate employee-per-room ratios.

An economic report on "Hotels, Restaurants and Laundries in the Virgin Islands" indicated that 2,021 workers were employed by 36 hotels and motels in 1970. There were an estimated 61 hotels in the U.S. Virgin Islands in 1970 and even though the survey may have included all major establishments, calculation of overall employee-per-room ratios is not possible. The report gave employment statistics for some individual hotels for selected months in 1970 and 1971. The sample was representative of different sized hotels, and included 1,232 rooms in 1970, and 1,438 rooms in 1971. The figures implied employee-per-room ratios of 1.06:1 in 1970 and 0.87:1 in 1971, slightly lower than those for the neighbouring island of Puerto Rico and for Jamaica. Establishments with between 50 and 99 bedrooms seem to have more employees per room than do small or large hotels. Seasonal variations in employment are less marked in the U.S. Virgin Islands than in many other islands with an equally well developed tourism industry, but variations are greater than in Puerto Rico.

Foreign Workers

There are no statistics indicating numbers of foreign workers in the hotel industry. The hotel incentives legislation restricts the number of expatriates occupying management positions. British and U.S. Virgin Islanders are closely related: many families have members in both territories.

It is thus likely that a significant proportion of U.S. Virgin Islands hotel workers came initially from the British Virgin Islands.

Earnings

Minimum wage rates agreed under local law in May 1969 and still operative in 1971 suggest very high weekly wages, if a 44 hour week is assumed: in excess of \$50. The rates are comparable with minimum rates in Bermuda, and are higher for more lowly paid occupations such as maids, waiters and gardeners. Hoteliers comment that labour is more expensive in the Virgin Islands than on the U.S. mainland when differentials in productivity are taken into account. One hotelier commented that maids in the U.S. Virgin Islands averaged 8 rooms per day, whereas maids in the U.S.A. cleaned 15 per day on average. Local minimum wage rates in the Virgin Islands are lower on the average than federal minimum rates, but in some occupations, particularly those where typing is involved, local minimum rates are higher.

The 1971 report on labour showed that typical earnings in the hotel industry, excluding tips, were 14% higher on average than minimum agreed wage rates. When tips were included, wages averaged 45% higher than minimum agreed rates. Bartenders' earnings were 98% more than the minimum rate, and waiters' were 117% higher. All tips are distributed among staff; local law prohibits hoteliers from retaining any part of gratuities.

Unionization

The 1971 report on labour indicates that the only labour union with which surveyed establishments had made agreements was the Seafarers' International Union. Fifteen of 24 hotels were unionized, representing 75% of all employees covered by the survey.

PART II: THE INDIVIDUAL ISLANDS

CHAPTER 6. HOTEL INVESTMENT, LAND VALUES AND HOTEL INDUSTRY INCENTIVES

(This Chapter consists of three Tables.)

Table 6.1

TOTAL INVESTMENT IN HOTELS

	1968	1969	1970	1971	1972	1973	Future (\$000's)
Antigua							60 - 70,000
Barbados	6,278,000	16,161,340	14,463,000	1,850,000	2,510,000	140,000	
Dominica	-	175,000	375,000	125,000	1,125,000		
Guadeloupe							14,400
Haiti							5,800
Jamaica							95,000
Montserrat						11,100,000	2,583
Netherlands Antilles	3,875,000	4,960,000	806,000	-	372,000 (one luxury hotel)		
St Kitts							1,400

Table 6.2

LAND VALUES - Market Selling Prices 1973 in US \$ per acre

TERRITORY	PRIME LAND	OTHER LAND	INFLATION SINCE 1970	COMMENTS	ACCESS TO BEACHLAND
ANTIGUA	\$16,000 - 25,000 Nelson's Dockyard, English Harbour, Hodge's Bay, Anchorage Hotel area.	\$2,000 Unserviced sites including beach land.	50%	St. John's area- higher values	
BAHAMAS	\$200,000 - Cable Beach, Nassau \$50,000-60,000 - waterfront, Free- port.	\$1,000 - 10,000 - depending as services - New Providence £5,000-10,000 - Grand, Bahama \$750-5,000 - depending on beach, size of lot, elevation	10 - 15%	Increase in price is slowing down.	
BARBADOS	\$200,000 - 300,000 - Beach property	\$20-22,000		All land prices expressed in sq. ft. \$50 p.s.f. being asked for some land.	Public access to beaches by land must be guaranteed.
BERMUDA	\$75,000-100,000	\$50,000		Restrictions on foreign land owing: - only 150 acres in each parish can be foreign owned. - only land over \$70,00 per acre	Ownership of beach property permitted.
BRITISH VIRGIN ISLANDS	\$100,000 - Beach property	\$8,000 for 1 acre) residential \$3,000 for 30 acres)	Fluctuations since 1968 rather than increase.		Impression that one can own beach property.
CAYMAN ISLANDS	\$100,000 - Beach property	\$25,000 - other land		Lots sold in foot run, usually x 400 feet.	No purchase of beach. Lots extend to boundary of beach only.
DOMINICA	\$20,000 - in commuting distance of Roseau \$16,000 - Castaways' hotel area (¼ acre lots at \$4,000)		None	Lots sold p.s.f. if in commu- tting distance of Roseau. Government trying to build up prices to \$22,500 per acre.	
GRENADA	\$200,000 - in prime areas e.g. Grand Anse beach	\$20,000 - 40,000		Prices expressed in \$p.s.f.	No purchase of beaches.
MARTINIQUE		\$7,000-9,000 \$3,900 - hotels purchasing land from government		Prices expressed in Square meters.	All beaches from high tide to 80 meters out are public property. Since 1967 beachlands have been able to be sold provided access for general public is permitted.
PUERTO RICO		\$60,000	Very wide variations -Average quoted.		
ST. KITTS	\$28,000 Frigate Bay - residential land over- looking Golf course. \$17,500 Frigate Bay - price to hotels				
ST. LUCIA	\$32,000 - 44,000 Rodney Bay - land sold for hotels. \$55,000 - Castries waterfront. \$32,000 - Vieux Fort.	\$13,000 - general, serviced land. \$22,000 - Castries \$17,000 - Rodney Bay	40%	All values quoted on sq. feet.	Access from land to beach must be provided.

Table 6.2 (Continued)

TERRITORY	PRIME LAND	OTHER LAND	INFLATION SINCE 1970	COMMENTS	ACCESS TO BEACHLAND
ST. VINCENT					Land up to high-water mark is public, but access by land may be impeded, due to development.
TURKS & CAICOS ISLANDS	Beach land Grand Turk \$2,000 Middle (North Caicos) \$12,000 South Caicos \$6,000 Providenciales \$2,600	Backland Grand Turk \$1,000 Middle and North Caicos \$100-200 Providenciales \$1,000 - 2,000	None	Generally bought in 10 acre lots or larger.	Public access to beaches. On West coast of Grand Turk, land previously purchased by residents has been eroded. Residents claim to own the beach, which was formerly land.
US VIRGIN ISLANDS	St. Thomas - \$50,000 On Central ridge giving good views in both directions. On beaches and in well-developed areas. St. John - all prices generally higher than St. T.	\$16,000 St. Thomas and St. Croix.	None		1972 Zoning law. All beach land not yet developed was zoned as public space.

Table 6.3

INCENTIVES GIVEN TO THE HOTEL INDUSTRY

Title of Incentive legislation	Year of introduction	Concessions			Conditions					Total beds assisted since legislation was introduced	Statistical source
		(a) relief from customs' duties	(b) tax relief	(c) other	(a) employment	(b) type of accommodation	(c) planning requirements	(d) timing of projects	(e) other		
Antigua Hotels' Aid	1951	Free entry of building materials and equipment	Exemption from income tax first 5 years, followed by exemptions in any 3 of next 5 years	Assistance in location of site and provision of infrastructure	100% employees to be British subjects	Any building for the accommodation of guests with more than 10 rooms	Government may require: 1) plans of proposed layout at 1" to 100'. 2) architectural drawings.	Govt. may require statement concerning anticipated construction period/or opening date	Certificate of incorporation of company to be supplied	1464	Min. Trade, Industry and Commerce. Hotel beds opened - new. No information about extensions to existing hotels.
Bahamas Hotels' Encouragement	1954	Free entry of building materials and equipment	Exemption real property tax - 10 years. Reduction in tax for following 10 years. Exemption from taxation on any earnings from the hotel for 20 years	Government has discretion to offer other concessions as it shall deem fit with regard to the type and location of the hotel.	75% to be natives of Bahamas.	New and existing hotels with more than 50 rooms in case of Nassau; more than 10 rooms in the Out Islands.			Covenants from the promoter for construction equipment furnishing and equipment of hotel. Inspection of site, buildings, any store room, or warehouse by Government.	NA	
Barbados Hotels' Aid	1956	Free entry of building materials and equipment	Income and profits' tax exemption for 10 years.			Purchase, construction or extension of any building for use as hotel (not less than 10 bedrooms) or for construction extension or renewal of any seawall for protection of hotel or beach facilities.			Hotels to keep records of imports and grant access to government inspectors. Restrictions on use of buildings deemed to be hotels	3, 238 (known)	Ministry of Tourism list of hotels and dates when Cabinet approval was granted.
Amendment proposed	1973		Only Bajan nationals to be given concessions to build hotels with less than 25 rooms, apts. with less than 50 units.								

Table 6.3 (continued)

Title of incentive legislation		Year of introduction	Concessions			Conditions		(c)	(d)	(e)	Total beds assisted since legislation was introduced	Statistical source
			(a) relief from customs' duties	(b) tax relief	(c) other	(a) employment	(b) type of accommodation	(c) planning requirements	(d) timing of projects	(e) other		
Bermuda	NII legislation											
British Virgin Islands	Hotels' Aid	1953	Free entry of building materials and equipment.	7-year tax holiday if fewer than 9 rooms; 10 years for larger hotels. Govt. may increase to 10 years and 20 years respectively. Investment deductions also granted, equal to 1/7 or 1/10 capital expenditure.		60% employed to be BV Islanders	Not less than 6 rooms			Articles imported under the Act to be marked. Applicants for licenses should furnish whatever information the government may from time to time prescribe and be subject to conditions which govt. chooses to impose.	1,466	Min. of Communications Works & Industry. List of applications for assistance.
Cayman Islands	Hotels' Aid	1955	Free entry of building materials and equipment				New and existing - not less than 10 rooms. Self-catering establishments excluded.			Inventory of equipment for govt. inspection. Articles to be marked.	1,266	Tourist Board. List of hotels and date of opening.
	Amendment	1967	7½% duty paid by hotels along 7-mile beach. 2½% duty paid by hotels in other locations.									
Dominica	Hotels' Aid	1959	Free entry of building materials and hotel equipment	Relief from income and real property tax for 10-12 years in the case of a company.		None	Not known	None	Not known	Not known	364	"Dies Dominica" publication by Premier's Office Nov. 1972. Hotels built with assistance.
	Development and Planning Corporation	1972	May remit duty on building materials and equipment for specified periods from time to time.	Relief from income tax for persons developing within its designated areas for up to 17 years.		Sale or lease of any land vested in the corporation may be subject to such covenants and conditions as Corporation may impose. The Corporation is solely responsible for planning in Dominica.						

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Table 6.3 (continued)

Title of incentive legislation	Year of introduction	Concessions (a) relief from customs' duties	Concessions (b) tax relief	(c) other	Conditions (a) employment	(b) type of accommodation	(c) planning requirements	(d) timing of projects	(e) other	Total beds assisted since legislation was introduced	Statistical source
Dominican Republic Promotion and Incentives for Tourism Development	1971	Free entry of building materials and equipment.	Exemption from income tax, from construction tax, from company tax, from licence fees and domestic purchase taxes. For 10 years in the case of large projects for 15 years.	Monetary authorities to guarantee provision of foreign exchange for importation and guarantee repatriation of all foreign investment in tourism. Dominican State shall provide basic services and infrastructure for declared priority tourist zones.		Number of rooms-minimum to be established by Directorate of Tourism Development. All kinds of new or expanding tourist accommodation may be given assistance. Also, all ancillary tourism facilities such as clubs, restaurants, shops, transport services and entertainments.	Architects' plan with preliminary engineering details prepared through local professional firm. Economic feasibility study and projected cash flow document by Dominican firm. Incentives will be granted only for such zones or areas as the Executive Power shall consider.	Two year period of fiscal exemption for completion of construction.	The legislation aims to promote tourism development consistent with the goals and objectives of the country and to achieve the co-ordination of public and private sector action.	NA	
Grenada Hotels' Aid	1954	Free entry of building materials and equipment	10 years income tax relief.		75% of employment to be given to Grenada nationals.	At least 10 bedrooms. Condominia, apartments and villas not eligible.	Government to prescribe what documents should accompany licence application.		Articles imported to be marked. Inventory to be kept and inspection to be permitted from time to time. Anyone receiving concessions who refuses accommodation or service to guests is guilty of offence against ordinance.	334	Min. of Housing List of operational hotels and their opening dates.
Haiti	No information									NA	

Table 6.3 (continued)

Title of incentive legislation	Year of introduction	Concessions			Conditions					Total beneficiaries since legislation was introduced	Statistical source
		(a) relief from customs' duties	(b) tax relief	(c) other	(a) employment	(b) type of accommodation	(c) planning requirements	(d) timing of projects	(e) other		
Jamaica Hotels' Incentive (Hotels' Aid - 1954 was repealed in 1968)	1968	Free entry of building materials and equipment.	10 year income tax holiday. 11-15 years if hotel declared to be in special development area. Any company may carry forward and write off its losses in the 6 years following expiration of the concessionary period.			Existing, new or extensions to hotels. Incentives given from April 1965 onwards. 10 or more rooms and facilities for meals for the accommodation of transient guests.		Minister may specify date on which operation of the hotel shall commence.	Minister must be satisfied that hotel proposed will be successful in a manner in which it will be operated. Availability of finances. Economic effects of its operations. Imported articles to be marked, recorded in prescribed manner and inspected from time to time.	11,208	Under Hotels' Incentive Act, since 1968 only.
Cottages' Incentives	1971	Free entry of building materials and equipment.	7 year income tax holiday. Losses may be carried forward and written off during the 6 years following expiry of the concessionary period.			"resort cottage" - not less than 2 bedrooms, living room, bathroom facilities, facilities for preparation and consumption of meals, furnished. Existing or extensions to cottages or groups of cottages at least 10 bedrooms.	Applications to be accompanied by such plans, diagrams and documents as Minister shall prescribe.		Minister to be satisfied that adequate finances available and premises will be used as resort cottages. Books, records and accounts to be kept and made available to Minister if required. Access to premises for inspection also to be granted.	NA	

Table 6.3 (continued)

	Title of incentive legislation	Year of introduction	Concessions			Conditions					Total beds assisted since legislation was introduced	Statistical source
			(a) relief from customs' duties	(b) tax relief	(c) other	(a) employment	(b) type of accommodation	(c) planning requirements	(d) timing of projects	(e) other		
Montserrat	Development Incentives	1954	Free entry of building material and equipment for tax holiday period.	7 year tax holiday and right to carry forward losses and write them off 6 years after expiry of the holiday period.		Persons not ordinarily resident in Montserrat or Grenada, Dominica, Antigua, St Lucia, St Kitts, Nevis, Anquilla, Barbados may not work in the enterprise unless govt. is convinced that their services cannot be recruited from these territories.	Any company wishing to establish or expand an enterprise may apply to the govt. for concessions. Not restricted to hotels or the tourism industry.	Notice to be published in 2 issues of newspapers at 2 week interval to enable objections to the Minister to be made.	Date by which construction, expansion or preparation of premises will commence and date at which commercial operations are expected to commence.	Particulars as to nature and location of proposed enterprise, contribution it is expected to make to the economy, amount and purpose of capital expected to be expended during the concessionary period, conditions under which workers will be employed. To satisfy govt. that enterprise is adequately financed and managed. To satisfy govt. it is in national interest.	128	Hotels' Association Hotels built with assistance under the Act.
Netherlands Antilles	Promotion of Industrial Estab. and Hotel Construction	1953	Free entry of imports to enterprises in designated free zones. Customs duty exempt for 10 years to all tourist projects.	Exemption from profits tax, income tax or property tax to hotel investments of NA 1500,000 in Curacao, or Aruba, or NA 50,000 elsewhere. Tax holiday for up to 11 years.			Hotels and other tourism projects undertaking initial investment in excess of NA F 50,000 (Curacao and Aruba) or NA F 500,000 elsewhere.	No information	No information	No information	Actual end 1972 = 1,820. Projections for 1974 + 1975 = 800.	Department of Economic Development. Numbers of beds receiving approval.
Puerto Rico												

Table 6.3 (continued)

	Title of incentive legislation	Year of introduction	Concessions		(c) other	Conditions		(c) planning requirements	(d) timing of projects	(e) other	Total beds assisted since legislation was introduced	Statistical source
			(a) relief from custom's duties	(b) tax relief		(a) employment	(b) type of accommodation					
St Kitts	Hotels' Aid	1956	Free entry of building materials and equipment	5 year tax holiday to small hotels, 10 years to hotels with 30 or more rooms.		60% of employees to be British subjects.	10 or more bedrooms.	Government may prescribe form and contents of documents to accompany application.		Imported articles to be marked. An inventory to be kept. Inspection to be allowed periodically.	662	Min. of Trade, Development and Tourism. List of hotels and their opening dates.
	Special Development	1968		15 year tax holiday - hotels with more than 100 rooms.								
St Lucia	Hotels' Aid	1959	Free entry of building materials and equipment.	Income tax relief for 7 years.	Concessions also given on construction of any groyne or seawall for protection of hotel or beach facility.	Only residents of St Lucia, Barbados, Grenada, St Kitts, Anguilla, Antigua, Montserrat, St Vincent, Dominica, permitted to work unless Minister satisfied that the skills required are unavailable.	Not less than 10 bedrooms, a kitchen for preparing guest meals, dining room(s); groups of cottages with not less than 10 bedrooms provided that centralised cooking and dining facilities exist			All applications to be accompanied by such documents as govt. shall specify. All items imported to be recorded, marked and made available for inspection when Supervisor of Customs requires.	1408 since 1970.	Min. of Trade, Industry, Agriculture and Tourism. Hotels opened since 1970 only.
St Vincent	Hotels' Aid	1954	Free entry of building materials and equipment.	Income tax exemption for 10 years.			More than 9 rooms, central cooking/dining facilities and under single management.	Site and building plans must accompany application.	Provisional licence for 2 years - to complete construction.	If Public Health Regulations are not complied with licence may be withdrawn.	656	Ministry of Agriculture. Hotels licensed to receive assistance - date of provisional licence.

Table 6.3 (continued)

Title of Incentive legislation	Year of Introduction	Concessions			Conditions			(d) timing of projects	(e) other	Total beds assisted since legislation was introduced	Statistical source	
		(a) relief from customs' duties	(b) tax relief	(c) other	(a) employment	(b) type of accommodation	(c) planning requirements					
Trinidad and Tobago	Hotel Development	1963	Free entry of building materials and equipment.	10 years' tax exemption and carry-over of any loss from the tax exemption period.	An accelerated depreciation of equipment at the rate of 20% p.a. Capital allowance in respect of approved expenditure incurred in erecting or improving the hotel at the rate of 20% of expenditure in each of any 5 years of the 8 years following the exemption period.		No information except that no concessions.	except that no hotels have been refused		3,251	IBRD data. All hotels listed have received assistance under incentive legislation except for 2.	
Turks and Caicos Islands	Encouragement of Development (Hotels' Aid 1961 - repealed)	1972	Free entry of building materials and equipment. Freedom from export duties on manufactured goods.	10-year tax holiday extendable to 15 years.		Development enterprise status granted only if it has beneficial effect on the employment of the Islands.	Any development enterprise benefiting the economy of the Islands. Any tourist related industry would be considered appropriate.		Dates of commencement of construction or preparation of premises and date of commencement of operations to be stated.	Applications must be accompanied by statement as to expected contribution to economy, amount of capital to be expended annually during tax exemption period, number of persons to be employed and provision for workers housing. Annual reports to be submitted to detail progress made, capital expended and capital depreciation. Imported goods to be recorded, marked and made available for inspection.	160	Governor's Office. All hotels and tourist accommodation have received assistance under either Hotels' Aid or the new ordinance.

Table 6.3 (continued)

Title of incentive legislation	Year of introduction	Concessions			Conditions			(d) timing of projects	(e) other	Total beds assisted since legislation was introduced	Statistical source
		(a) relief from customs' duties	(b) tax relief	(c) other	(a) employment	(b) type of accommodation	(c) planning requirements				
S. rgin lands Industrial Incentive	1972	5 years exemption from duty on building materials. Subsidy on duty or equipment.	100% exemption from real property tax for 3 years; 50% exemption for further 3 years. All gross receipt taxes - exemption for 5 years.		All projects must employ VI residents with certain exceptions: immigrant workers admitted for 3 months only to train local personnel.	Any industrial enterprise, guest-house with at least 5 rooms and \$50,000 investment, hotels with 50 bedrooms and at least \$500,000 investment.	Proposals to meet ecological standards and guarantee access for public to beaches.		Developers must be either resident of the Islands or a locally incorporated company. Must agree to purchase local goods where available.	1,852 since 1968	Commission of Commerce. Hotels granted tax exemption 1968 to date.

TOURISM SUPPLY STUDY - CARIBBEAN REGION

APPENDIX A - QUESTIONNAIRE FOR TOURISM SUPPLY STUDY

The study is based on the following questionnaire which was drawn up jointly by the IERD and the Consultants. The major constraint on data collection was the time available in each island.

- (a) The number of beds in resort accommodation classified by size and where possible by category of hotel and in villas, apartments and guest houses, annually from 1968, with 1960 and 1965 as benchmark dates.
- (b) The number of beds under construction in each category of accommodation.
- (c) The number of beds in projects whose construction is under serious consideration.
- (d) The number of beds and rooms that have received approval under incentive legislation annually, since its inception and projections for immediate future.
- (e) Foreign tourist arrivals and bednights by country of origin annually from 1968, and for 1960 and 1965 as benchmark dates; average length of stay, where these data are readily available.

The following information would also be extremely useful:

- (f) Average daily expenditure of tourists by category of expenditure and by type of tourist, and total foreign exchange revenues from tourism annually, from 1968 balance of payments projections for the tourism sector.
- (g) Hotel occupancy rates by month, annually since 1968, and if possible by size and category (better still, for individual hotels where at all possible).
- (h) Hotel rates in each category during the peak and off-season for the past three years, differentiating between EP, AP and MAP quotations.
- (i) Direct employment effects of hotels, e.g., total employed in hotel sector and current and past employee-per-room ratios; wage structure among selected hotel employees (e.g., waiter, chambermaid, reception clerk, manager) and impressions of degree of unionisation.

- (j) Average construction cost per category of accommodation, if possible, over the past three years.
- (k) Total investment in hotels since 1968 annually, if possible, and projections to 1975.

Documents on the tourism sector should be collected, specifically: statistical publications, hotel directories, copies of incentive legislation, economic and market studies, etc.

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TOURISM SUPPLY STUDY - CARIBBEAN REGION

APPENDIX C - LIST OF ABBREVIATIONS USED IN TEXT

CARICOM	=	Caribbean Economic Community
CDC	=	Caribbean Development Corporation
CIDA	=	Canadian International Development Agency
IBRD	=	International Bank for Reconstruction and Development (World Bank)
ILO	=	International Labour Office
OAS	=	Organization of American States
TTT	=	Transport & Tourism Technicians Ltd., London
U.K.	=	United Kingdom
UNDP	=	United Nations Development Programme
INFRATUR	=	Departamento para el Desarrollo de la Infraestructura Turistica