

# 2016 CARIBBEAN TOURISM QUALITY INDEX

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## RESONANCE REPORT



**RESONANCE CONSULTANCY  
CREATES DEVELOPMENT STRATEGIES,  
PLANS AND BRANDS THAT  
SHAPE THE FUTURE OF  
PLACES AROUND THE WORLD.**

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# INTRODUCTION

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The Caribbean is a region shaped by every imaginable influence. But if the heart of each country beats to its own individual rhythm, the shared blood that flows through the region's veins is the industry of tourism. And flow it does, particularly in 2015.

Travel to the region grew in record breaking fashion in 2015. The seven percent increase in international trips to the Caribbean – a total of 28.7 million – marks the second consecutive year that tourism arrivals to the Caribbean grew faster than the global growth rate for international travel. 2015 is also the first year in recent history that the Caribbean outpaced all other major regions in growth according to the Caribbean Tourism Organization (CTO), and the World Travel and Tourism Council (WTTC) reported that money spent by foreign visitors to the region grew by 5.9% in 2015, well above the global average of 2.4%. Increased numbers of visitors came from everywhere – there were more European, American, Canadian and South American travelers than the previous year, with South America accounting for the highest growth at 18.3%.

Accommodation prices went up accordingly. The average room rate increased 4.6% to \$229.44, and room occupancy was up one percentage point to 68.8% according to data from U.S. company Smith Travel Research. Cruise performance for the year was also strong, with Trinidad & Tobago (104%), Bonaire (74.2%) and British Virgin Islands (43.1%) recording the highest percentage increases in 2015.

Yes, there were concerns around the Zika virus, which became an issue the same year the CTO declared the Year of Romance; there's the bankruptcy of the new Baha Mar mega-resort in the Bahamas, and Puerto Rico's financial crisis – although tourism is a bright spot. It contributes more than \$7 billion annually to the Puerto Rican economy with upwards of three million international travelers visiting the island every year, according to the WTTC.

In last year's Caribbean Tourism Quality Index, Resonance advanced the idea that improved United States/Cuba relations would spark a new kind of revolution in the region. In 2016, it's well underway. While Cuba is a destination already well known and visited by much of the world, it is relatively uncharted territory for U.S. travelers. That's about to change, and the ripple effect may be enormous. U.S. leisure travel to Cuba nearly doubled last year to more than 160,000 visitors. In the year following Obama's historic visit, Cuba expects to see a 10-20 percent increase in U.S. travelers thanks to as many as 110 new commercial flights from the U.S. to Cuba per day starting in late 2016.

Overall, growth in travel to the Caribbean was "supported by sustained economic recovery in main markets, a strong U.S. dollar and a collapse in oil prices," according to Ryan Skeete, the CTO director of research and IT, in the State of the Industry Report in February 2016. Increased airlift from a variety of markets and robust marketing in the U.S. also helped. Security threats in other traditional holiday destinations for Europeans, such as the Middle East and Africa, are likely also adding to the Caribbean island's allure for travelers in those markets.

Yes, 2015 was a very good year for tourism in the Caribbean. But Hugh Riley, secretary general of the CTO, reminded everyone in the State of the Tourism Industry Report that the Caribbean cannot afford to be complacent. "We must continue to grow our traditional markets, strengthen emerging ones and penetrate new sources as we target the 30 million arrivals mark," he said. To meet this goal will require not just additional marketing, but a heightened focus on product development and infrastructure investment to ensure that both the visitor experience and quality of life for local residents improves in tandem with the growth in visitors to the region. Or as CTO Chairman Richard Sealy put it at the SOTIC conference in Curaçao, the Caribbean cannot be satisfied until it becomes "the world's most desirable year-round, warm weather destination, and until every citizen of the Caribbean is positioned to benefit from tourism."



# METHODOLOGY



The 2016 Caribbean Tourism Quality Index measures tourism's supply-side performance and competitiveness in 28 destinations across the Caribbean based on both absolute and indexed scales: the absolute scale measures the total number of quality experiences; the indexed scale evaluates performance in terms of how many quality experiences are delivered per visitor (i.e. the number of quality experiences per 100,000 visitors).

In our analysis of thousands of traveler reviews on key social media sites like TripAdvisor, we considered only entries rated as 'very good' or 'excellent' in order to ensure that the rankings spoke not just to the quantity of products on offer, but also the quantity of quality experiences as rated by visitors themselves.

The rankings are therefore a reflection of the quantity of quality tourism products, activities and experiences within a destination, and may also reflect to some degree the success of a destination's tourism industry in engaging their visitors through social media.

Caribbean Tourism Organization (CTO) 2015 visitor estimates were integrated to create the indexed scoring. To formulate visitor estimates for Bonaire, Guadeloupe, Saint Barthelemy, Saint Kitts & Nevis, Saint Martin and Sint Maarten, we applied most recent statistics from local government sources.

Resonance only considered Caribbean destinations with more than 100,000 annual visitors for this report. The rankings are based on an analysis of the number of products or experiences in 16 different areas, in addition to two statistical fields, crime rates and air access. For each destination, rankings are grouped into eight core categories:

- 1. Culture**  
**The arts and culture in a destination**  
Museums - TripAdvisor  
Concerts & Shows - TripAdvisor
- 2. Entertainment**  
**Fun attractions and experiences**  
Shopping - TripAdvisor  
Nightlife - TripAdvisor  
Amusement Parks - TripAdvisor  
Zoos & Aquariums - TripAdvisor  
Casinos & Gambling - TripAdvisor  
Fun & Games - TripAdvisor
- 3. Sightseeing**  
**The natural and built environment of a destination**  
Sights & Landmarks - TripAdvisor  
Nature & Parks - TripAdvisor  
Sightseeing Tours - TripAdvisor
- 4. Sports & Adventure**  
**A destination's outdoor activities and adventures**  
Outdoor Activities - TripAdvisor  
Boat Tours & Water Sports - TripAdvisor
- 5. Culinary**  
**The food experiences in a destination**  
Special culinary experiences - TripAdvisor  
Restaurants - TripAdvisor
- 6. Lodging**  
**Accommodation in a destination**  
Hotels - TripAdvisor
- 7. Safety\***  
**Crime level within a destination**  
Homicide rate - UNODC
- 8. Connectivity**  
**Airline connectivity to/from a destination**  
Direct international flight connections - Open Flights

\* Safety is based on the most recently available homicide statistics.

# EXPERIENCES





Experiences are integral to travel and today's travelers regularly seek new experiences on vacation; 69 percent of global travelers plan to try something new in 2016, according to a TripAdvisor survey of 44,000 travelers. The Resonance 2016 Caribbean Tourism Quality Index shows that the experiences people enjoy most in the Caribbean, according to their ratings on social media, are culinary, sightseeing, and sports and adventure. Entertainment and culture come in a distant fourth and fifth.

Not surprisingly, food-related experiences occupy the lion's share of our data, accounting for 42.2% of the very good and excellent experiences recommended by travelers to the Caribbean. Of course, food is a necessary part of every traveler's itinerary, but Caribbean food is richly satisfying, offering influences of Europe, India, Africa and Asia – a stew of flavors unique in the world.

If food is a traveler's pleasurable necessity, sightseeing, and sports and adventure are optional. Sightseeing accounts for 25 percent of traveler recommended experiences in the Caribbean. From historical landmarks like Old San Juan and Old Havana to the white sand beaches of Bavaro and Varadero, popular sightseeing and activity sites offer travelers a range of unique experiences. Grace Bay in Turks & Caicos and Magens Bay in U.S. Virgin Islands have helped both destinations climb in Resonance's sports and adventure rank – USVI improved from sixth last year to first overall this year, while Turks and Caicos moved from 13th to 10th.

Entertainment is measured by recommendations of various categories that require strong infrastructure, like shopping, amusement parks, and zoos and aquariums. The Dominican Republic, Puerto Rico and U.S. Virgin Islands are three of the top four ranked destinations for entertainment. The 'big three' have the infrastructure in place to offer a variety of entertainment to please both adults and kids, but the smaller Aruba and Sint Maarten are doing creative things to climb into the top 10.

While cultural experiences represent a very small percentage of the overall experiences recommended by travelers, Cuba's strength in this particular area (1st overall) may also help attract a new, more culturally-oriented traveler to the region, creating an increased demand for more cultural offerings throughout the Caribbean – or potentially increased attendance at the region's dozens of UNESCO Heritage Sites. Whether Cuba can continue to deliver a unique cultural experience over time – as U.S. hotel brands and visitors flood into the country – will be one of Cuba's greatest challenges. And reaction from the rest of the region will be under the microscope.

#### Recommended Caribbean Experiences by Category



- 42.2% ■ Culinary
- 2.2% ■ Culture
- 5.8% ■ Entertainment
- 24.6% ■ Sports & Adventure
- 25.1% ■ Sightseeing



# CULINARY

Food is much more of an experience than a mere necessity in the Caribbean, and culinary tourism continues to rise. To measure the culinary experiences in a destination, we have analyzed the number of very good and excellent recommendations in TripAdvisor's restaurant category and special culinary experiences that include food and drink, along with cooking classes, distillery tours and other food-related activities.

Restaurants are the traditional venues, and here Aruba excels: it boasts the Caribbean's top rated restaurant, Madame Janette, as well as three of the top 10 restaurants and five of the top 15.

**CULINARY FESTIVALS HAVE BECOME KEY ENTRY POINTS TO THE CULINARY EXPERIENCES OF THE ISLANDS – EVERYONE FROM TOP-RANKED PUERTO RICO TO SECOND-PLACE DOMINICAN REPUBLIC TO TURKS AND CAICOS (20TH) HOLD CELEBRATIONS OF THEIR PARTICULAR FOOD AND DRINK.**

Puerto Rico, ranked best overall for food, holds Saborea, which brings visitors together with the island's top chefs, signature Mofongo, Lechón, Morcilla and other dishes that have evolved from Spanish, African and native Tainó influences. Taste SD, held on second-ranked (and festival-happy) Dominican Republic, holds a Culinary Cup of the Americas. Third-place Cuba is ripe for a major event.

Festivals can create significant bumps in visitation. The 10-day Grenada Chocolate Festival welcomes thousands and helped contribute to the country's 12.7% increase in total arrivals and 5.4% increase in stayover arrivals in 2015 – and a 21st ranking in culinary experiences.







But competition is stiff. The Barbados Food, Wine and Rum festival celebrates the gastronomic art of the Caribbean (the country ranks 9th in our findings); 23rd-ranked Anguilla has a Festival Del Mar to showcase its seafood heritage during a weekend long gathering of cookouts, fishing contests and boat races; and 5th-ranked Jamaica has a Portland Jerk Festival during which everything from lobster and conch to sausage, pork and chicken are given the jerk treatment.

Awareness of Caribbean cuisine is growing in key Caribbean markets like New York, where new restaurants are elevating the perception of island cuisine. Millennials are being turned on to the creativity of island food at mainland events like Mofongo NY, a celebration of Puerto Rican food, drink and culture, which merited a feature in Red Bull magazine. Social media, specifically Instagram, has allowed foodies and chefs to interact – chefs Jason Howard, Victor Chaparro and Nina Compton are just a few of the Caribbean chefs using Instagram to attract and inspire domestic and international followers. The New York Times hailed a “New Caribbean Food Movement” in the city late in 2015. There was a Caribbean version of the popular TV show Chopped in 2015, and even Disney is in on the act, offering a deep dive into the tastes of the Dominican Republic during the 2015 Epcot Food and Wine festival.

### *Top 10 Culinary Rankings*

- 01 Puerto Rico
- 02 Dominican Republic
- 03 Cuba
- 04 Bahamas
- 05 Jamaica
- 06 Guadeloupe
- 07 U.S. Virgin Islands
- 08 Martinique
- 09 Barbados
- 10 Aruba



# SIGHTSEEING

Where sea, sand and sun are plentiful, sightseeing is done differently in the Caribbean – it's more about natural landscapes than built heritage. To measure sightseeing in a destination, we have analyzed the number of very good and excellent recommendations on TripAdvisor in the categories of sights and landmarks, nature and parks and sightseeing tours.

Attractions like Dunn's River Falls in Jamaica, Varadero Beach in Cuba, Bavaro Beach in Dominican Republic and Isla Saona (Saona Island) are among the most popular sightseeing destinations. Rated best overall is Dunn's Falls – the series of cascading waterfalls that climbs 600 feet dares visitors to start at the water and work their way up the falls. Hand holding is a must to prevent slipping.

Varadero Beach and Old Havana in Cuba are ranked the second and third most popular attractions. Even with relatively few American visitors, Cuba is already the sixth most popular sightseeing country in the Caribbean.

As a country, Puerto Rico ranks best overall for sightseeing. Historic landmarks like Old San Juan and Castillo San Cristóbal – the fort built by the Spanish in 1783 to protect against land based attacks – are not impacted by the country's economic turmoil. "Puerto Rico is very definitely open for business," says the Puerto Rico Tourism Company.

**VARADERO BEACH AND OLD HAVANA  
IN CUBA ARE RANKED THE SECOND AND  
THIRD MOST POPULAR ATTRACTIONS.**





While the region's largest countries continue to attract the highest volume of sightseers, smaller nations are clawing their way into the discussion – not just with spectacular landscapes, but with big ideas. Guadeloupe's Memorial ACTe opened in July 2015 in Pointe-à-Pitre to commemorate the history of the slave trade in the region. The interactive permanent exhibit intertwines the history of slavery with contemporary art and photography covering the theme of African diaspora. UNESCO has deemed it important enough to make it part of its Slave Route Project.

### *Top 10 Sightseeing Rankings*

- 01** Puerto Rico
- 02** Dominican Republic
- 03** U.S. Virgin Islands
- 04** Jamaica
- 05** Bahamas
- 06** Cuba
- 07** Cayman Islands
- 08** Saint Lucia
- 09** Barbados
- 10** Guadeloupe



# SPORTS & ADVENTURE

To measure sports and adventure in a destination, we have analyzed the number of very good and excellent recommendations on TripAdvisor that include the categories of outdoor activities and boat tours and water sports.

In 2016, the U.S. Virgin Islands ranks first overall for sports and adventure, a leap from sixth last year. With their uncrowded beaches and emphasis on local over commercial and natural over man-made, USVI's main islands of Saint Croix, Saint John, and Saint Thomas have appealing outdoor attractions at almost every turn. Of course, having a 5,000-acre national park and being featured in New York Times 52 Places to Go in 2016 (the soon-to-be-developed Coral Bay) will also bring attention to a country's outdoor attractions.



Increasingly, destinations put a twist on the definition of outdoor activity: Coral Bay's monthly full moon parties; Trunk Bay's Underwater Trail, with 659 feet of snorkeling trails; Cinnamon Bay's restaurants, campgrounds and watersports center offers everything from paddle boards and sea kayaks to an archaeology workshop with displays of Tainó Indian artifacts recovered from an island dig.

**TO MEASURE SPORTS AND ADVENTURE IN A DESTINATION, WE HAVE ANALYZED THE NUMBER OF VERY GOOD AND EXCELLENT RECOMMENDATIONS ON TRIPADVISOR THAT INCLUDE THE CATEGORIES OF OUTDOOR ACTIVITIES AND BOAT TOURS AND WATER SPORTS.**

Dominican Republic, Puerto Rico, Bahamas and Cayman Islands make up the rest of the top five in sports and adventure. More specifically, it's beaches, boat tours and watersports that show up as favorites in rankings of activities. The usual suspects – Varadero beach in Cuba and Bavaro and Macao beaches in Dominican Republic – continue to draw many positive reviews.

Almost half of the top 25 outdoor activities are adventure-related, and the more unique – like deep sea shipwreck diving in Nassau or riding a futuristic underwater motor-scooter – the more a destination can appeal to experience seekers and adrenalin junkies. Of course, ABC's Jeep Tours in Aruba or Sint Maarten's Captain Alan's Three Island Snorkeling, which are somewhat more prosaic activities, don't disappoint.

### *Top 10 Sports & Adventure Rankings*

- 01 U.S. Virgin Islands
- 02 Dominican Republic
- 03 Puerto Rico
- 04 Bahamas
- 05 Cayman Islands
- 06 Jamaica
- 07 Guadeloupe
- 08 Barbados
- 09 Saint Lucia
- 10 Turks & Caicos Islands





# ENTERTAINMENT

To measure entertainment in a destination, we have analyzed the number of very good and excellent recommendations on TripAdvisor in the categories of shopping, nightlife, amusement parks, zoos and aquariums, casinos and gambling, and fun and games.

The Dominican Republic is the category's top rated destination, and Punta Cana's seemingly endless row of resorts along the Bavaro strip is pure entertainment, heaven for both adults and kids.

Adventure and water parks dominate the rankings of the most popular entertainment attractions, with five of the top 10. But Aruba's less flashy entertainments, like the Bon Bini and Carubbian festivals (pun intended) offer music and local fare that have helped boost the country to a seventh place standing. Aruba is doing something right: the Dutch island off the coast of Venezuela gained international recognition in 2016 as the Aruba Tourism

Authority won "Best Tourism Board Overall" in the Travvy Awards, as judged by nearly 40,000 travel agent voters. "Now we're not only the sunniest and happiest island in the Caribbean, but also the most decorated," said Ronella Tjin Asjoe-Croes, the CEO of Aruba Tourism Authority.

**THE DOMINICAN REPUBLIC IS THE CATEGORY'S TOP RATED DESTINATION, AND PUNTA CANA'S SEEMINGLY ENDLESS ROW OF RESORTS ALONG THE BAVARO STRIP IS PURE ENTERTAINMENT, HEAVEN FOR BOTH ADULTS AND KIDS.**





It might not be entertainment in the traditional sense, but feeling the heat from a 747 engine only meters from your head is exhilaration that can't be felt anywhere but on Sint Maarten's Maho Beach. The beach is famous for its close proximity to Princess Juliana International Airport. Beach-goers experience multiple flights arriving and departing overhead daily, including KLM's 747 and Air France's Airbus A340. Sint Maarten ranks fifth for entertainment; this curious experience attracts hundreds of tourists each day.

### *Top 10 Entertainment Rankings*

- 01** Dominican Republic
- 02** Puerto Rico
- 03** U.S. Virgin Islands
- 04** Cuba
- 05** Sint Maarten
- 06** Bahamas
- 07** Aruba
- 08** Jamaica
- 09** Barbados
- 10** Bermuda



# HOTELS & LODGING

To measure hotels and lodging in a destination, we have analyzed the number of very good and excellent recommendations on TripAdvisor that include accommodation and hotels.

With volume undoubtedly playing a big role, Dominican Republic ranks best overall in our hotels and lodging ranking, owning nine of the ten most recommended hotels. But its success isn't only due to the variety of all-inclusive resorts along Bavaro Beach. Luxury made an auspicious entry in the form of Aman Resorts' new Amanera property. Opened in November 2015, Amanera is a series of contemporary casitas perched on a cliff overlooking the beautiful Playa Grande Beach on the Dominican's north coast. At an estimated \$1,300 per night, Amanera is for the high net worth traveler, and brings "a whole new level of luxury to the Caribbean," according to Forbes.

If travelers are impressed now, just wait. The DR has no plans to slow down its lodging growth: more than 18,000 new hotel rooms are scheduled to be added by 2019 – based on a planned 55 new hotel projects and more than \$2 billion worth of investment coming into the hotel pipeline.

**TO MEASURE HOTELS AND LODGING IN A DESTINATION, WE HAVE ANALYZED THE NUMBER OF VERY GOOD AND EXCELLENT RECOMMENDATIONS ON TRIPADVISOR THAT INCLUDE ACCOMMODATION AND HOTELS.**

The Bahamas is rated third for its hotel and lodging offerings despite the failure of the huge and hotly-anticipated Baha Mar resort. And it hasn't stopped other developers from opening new destinations. The 4-star Warwick Paradise Island Bahamas, opening in October



2016, brings adult-only all-inclusive lodging to luxurious new heights. The 244-room resort is designed to provide adult guests with an "unpretentious all-inclusive vacation experience with service dedicated to pampering travelers."

In Cuba, hotels are bracing for the flood of Americans – and American hotels are flooding into Cuba. With U.S. travel to Cuba up 77 percent in 2015, Cubans can expect many of their rooms to fill up in 2016 and



beyond. Starwood inked a deal for three hotels in Havana following Obama's historic visit, making it the first hotel company to move in. Airbnb swiftly answered, announcing its presence in Cuba and providing bookings for U.S. travelers in authorized travel categories. In fact, Airbnb's presence is being felt throughout the entire Caribbean; with approximately one million available rooms worldwide, Airbnb had more room inventory in 2015 than the largest hotel companies in the world, according to the 2015 Barclays Investment Report.

Hotel development is a bright spot for fifth-ranked Puerto Rico, which will welcome a new all-inclusive Dreams Puerto Rico Resort & Spa in the Porta Del Sol region this year. The 250-room resort, built by Apple Leisure Group subsidiary AMResorts, hopes to spark future all-inclusive properties to the region. "We're excited to enter a destination that has yet to discover the substantial benefits of the all-inclusive model," Alex Zozaya, CEO of Apple Leisure Group, told Caribbean Journal. On the other end of the room-rate spectrum, the Ritz-Carlton opened its second property on the island in 2015. Located on eight acres of pristine beachfront property in Isla Verde, Ritz-Carlton San Juan puts guests moments from both the airport and the quaint cobblestone streets of Old San Juan. In Haiti, post-earthquake development has tourism back on its feet. A spate of hotel development in Port-au-Prince, including the contemporary-cool Marriott Port-au-Prince and the Best Western in Petion-Ville, has raised the bar for comfort in the embattled capital and moved Haiti into the top 10 for hotels and lodging.

### *Top 10 Hotels & Lodging Rankings*

- 01 Dominican Republic
- 02 Jamaica
- 03 Bahamas
- 04 Cuba
- 05 Puerto Rico
- 06 Barbados
- 07 Turks & Caicos Islands
- 08 Saint Lucia
- 09 Haiti
- 10 Guadeloupe





# CULTURE

To measure culture in a destination, we have analyzed the number of very good and excellent recommendations in the TripAdvisor categories of museums and concerts and shows.

Few countries in the world, let alone in the Caribbean, are embarking on as profound a change as Cuba; we may never cease analyzing the impact the ‘thaw’ will have on Cuban culture. Cuba and the U.S. have always had tight cultural ties, despite the 1961 restrictions – the nearly 1.8 million Cubans in the U.S. are a key reason. From Ricky Ricardo and the Buena Vista Social Club to the Cuban Sandwich and La Habanera, the island’s products, people and programming have been as forbidden as they are desired in the U.S. Perhaps severing ties will turn out to have been the greatest advertising campaign ever for the country.

To a new generation of U.S. visitors, Cuba offers a rich historical culture; museums like the National Museum of Fine Arts in Havana and the Museo de la Revolución are hubs for tourists interested in the Cuba they know



and the Cuba they don’t. Both are rated among the most popular cultural sites in the Caribbean, and they’ll be bracing for the 10-20 percent increase of U.S. travelers who’ve been wanting to take a bite out of the forbidden fruit for years.

**TO MEASURE CULTURE IN A DESTINATION, WE HAVE ANALYZED THE NUMBER OF VERY GOOD AND EXCELLENT RECOMMENDATIONS IN THE TRIPADVISOR CATEGORIES OF MUSEUMS AND CONCERTS AND SHOWS.**

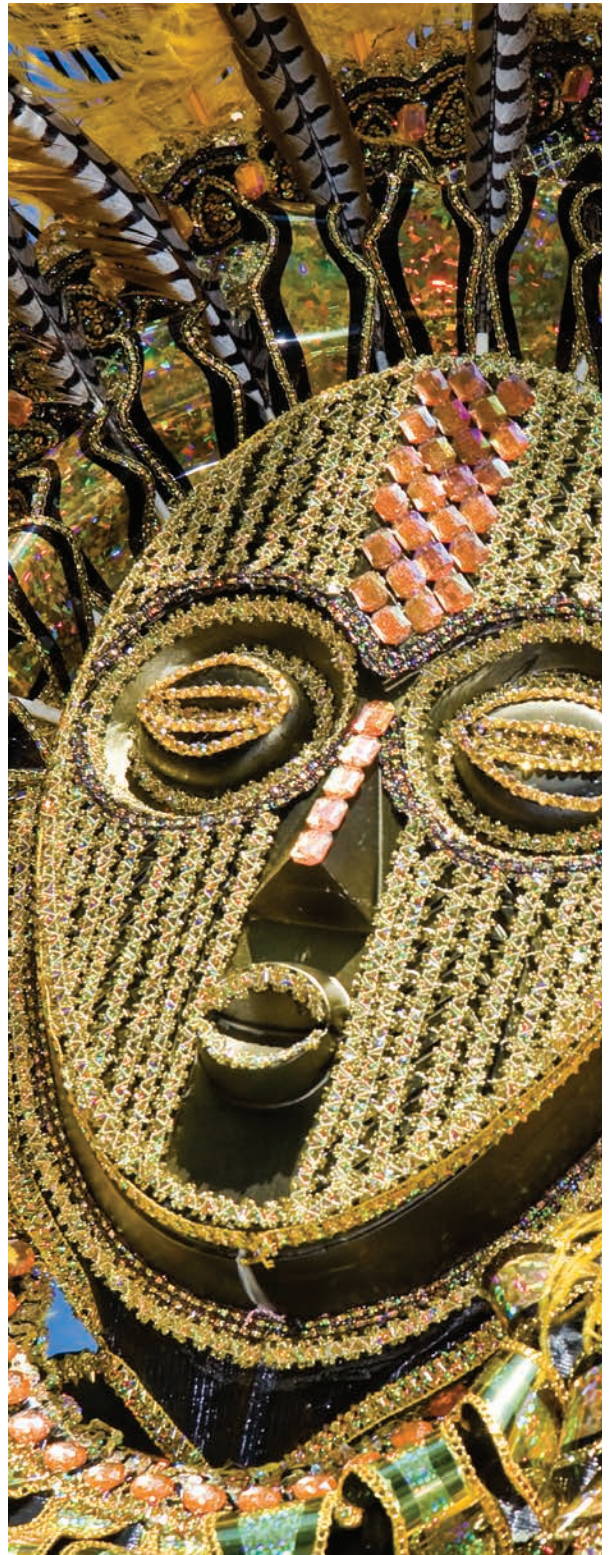
But while Cuba is fresh for American visitors, Bermuda has had to turn around its perception as a tired destination – successfully, since it’s ranked fifth in our cultural index. Bermuda has been long considered a ‘heritage product’ – well known, old-fashioned, with tourism initiatives that fail to attract a sub 45-year-old traveler. But with a fresh marketing strategy based on “telling rich, authentic stories” by the Bermuda Tourism

Authority, it recently attracted the America's Cup in 2017 and even its own BBC documentary, which dives deep into the country's wildlife, history and cultural heritage. "We launched a new brand platform for Bermuda in 2016 and we have been very focused on integrated marketing and sales efforts through our own team as well as with hotel and airline partners," Victoria Isley, the BTA'S chief sales and marketing officer told the Royal Gazette.

Vacation air arrivals to Bermuda rose in the first quarter of 2016 to the highest figure in eight years, so clearly, something's working. The boost in arrivals also means more interest in the country's cultural attractions, like the Bermuda Aquarium, Natural History Museum & Zoo, which is ranked among the top 25 specific cultural attractions in our rankings.

### *Top 10 Culture Rankings*

- 01 Cuba
- 02 Puerto Rico
- 03 Dominican Republic
- 04 Bahamas
- 05 Bermuda
- 06 Jamaica
- 07 Barbados
- 08 U.S. Virgin Islands
- 09 Guadeloupe
- 10 Aruba





# SAFETY

To measure safety in a destination, we have analyzed crime levels using the homicide rate per 100,000 population provided by the most recent data from the Global Study on Homicide by the United Nations Office on Drugs and Crime.

**“PROBABLY THE GREATEST DANGER TO TRAVELERS TO MARTINIQUE IS OVEREXPOSURE TO THE SUN,” QUIPS FRENCHCARIBBEAN.COM.**

Safety is considered the most important factor when choosing a destination for U.S. luxury, millennial and retiree travelers, according to Resonance’s 2015/2016 consumer studies. And the safest destination in the Caribbean is Martinique. “Probably the greatest danger to travelers to Martinique is overexposure to the sun,” quips FrenchCaribbean.com. The French island in the eastern Caribbean Sea has a homicide rate of 2.7 per 100,000 people, according to the UNODC. Cuba is ranked the second safest destination in the Caribbean. Will an increase in tourists mean an increase in crime? “Cuba will remain one of the safest places to travel to in the world,” says Tom Popper, president of Insights Cuba, a firm that provides U.S. citizens legal travel to Cuba.



“The country has low crime rates, little political turmoil, and Cuban society is already embracing their new economic future with renewed engagement with the U.S. and the resulting American tourists.”

Aruba, Barbados and the Turks & Caicos Islands make up the rest of the five safest Caribbean destinations. While the age-old perception has been that the Caribbean can be a danger for tourists, Europe’s current situation – with three terror attacks in less than six months – changes the perspective. Ironically, safety has become a competitive advantage for the region. “The Caribbean is considered a zone of tranquility; that is particularly appealing when there are issues overseas,” says Hugh Riley, secretary general of the Caribbean Tourism Organization.



On the opposite end of the safety spectrum, the most dangerous destinations, based on homicides per 100,000 population, remain those that attract the greatest number of visitors. Jamaica, Bahamas, Puerto Rico and Dominican Republic are all among the eight least safe destinations, and they all rank in the top five of our visitor ranking. According to the World Economic Forum's 2015-16 Global Competitiveness Report, crime and theft are the second most problematic factors to doing business in Jamaica, accounting for 16 percent of the country's challenges.

Cuba remains the anomaly – top five in our visitor ranking and top three in our safety ranking.

### *Top 10 Safety Rankings*

- 01 Martinique
- 02 Aruba
- 03 Cuba
- 04 Turks & Caicos Islands
- 05 Barbados
- 06 Anguilla
- 07 Bermuda
- 08 Sint Maarten
- 09 British Virgin Islands
- 10 Guadeloupe





# CONNECTIVITY



**TO MEASURE CONNECTIVITY IN A DESTINATION, WE HAVE ANALYZED DIRECT INTERNATIONAL FLIGHT CONNECTIONS TO/FROM A DESTINATION USING MOST RECENT DATA FROM OPEN FLIGHTS.**

For many, the Caribbean is an escape from the hustle and bustle of the cold world around them. But that world and the Caribbean are becoming more connected each year, with major international and U.S. carriers expanding their services to the region. The Dominican Republic is the most connected, according to our ranking, with seven international airports serving major carriers and charters from the U.S. and elsewhere. Cuba is already in second place, and the increase of up to 110 flights from the U.S. represents five times more flights than have been allowed from the U.S. to Cuba in more than 50 years. An increase in flights will result in a decrease in ticket prices based on competition among airlines.



Aruba's investment into their aviation resources is paying off; it ranks sixth overall for connectivity. The Aruba Airport Authority has fully renovated its Reina Beatrix International Airport, including an airport-wide Wi-Fi upgrade and an update to the airport arrival hall and VIP lounges. It has announced further airport investments between \$100-150 million in the coming years; in 2015 Aruba hosted 1.22 million overnight visitors, a 14.3% increase over the country's record 1.07 million visitors in 2014.

The Dutch Caribbean island of Curaçao (9th in our rankings) saw a 13 percent increase in arrivals in March 2016 according to the Curaçao Tourist Board, due in part to increased flight connectivity. American Airlines added an additional flight per week from Charlotte, NC to Curaçao in December 2015, carrying up to 124 passengers. With increased demand from the Netherlands, KLM has also added two more flights per week from Amsterdam to Curaçao between July 8 and September 4, 2016, bringing the total flight count by KLM to Curaçao to 11 per week.

Sint Maarten (7th place) boasts a strong partnership with KLM, with three flights per week of up to 408 passengers from Amsterdam; it also leads the way with the Caribbean's best airport, according to the Caribbean Journal. Sint Maarten's Princess Juliana International Airport was named 'Caribbean Airport Of The Year 2016'. Perhaps allowing tourists to get within a few hairs of planes as they land helped with the top ranking, along with "aesthetics, food and beverage options, shopping and, importantly, customer service levels."

### *Top 10 Connectivity Rankings*

- 01 Dominican Republic
- 02 Cuba
- 03 Jamaica
- 04 Puerto Rico
- 05 Bahamas
- 06 Aruba
- 07 Sint Maarten
- 08 Trinidad & Tobago
- 09 Curaçao
- 10 Cayman Islands

# ABSOLUTE RANKING







Our Absolute Rankings are based on the total number of very good or excellent experiences in each country according to thousands of visitor reviews on TripAdvisor and other social media.

Each destination is ranked based on the total number of very good or excellent attractions and experiences. Destination attributes were grouped into eight sub-rankings: culture, entertainment, sightseeing, sports and adventure, culinary, lodging, safety and connectivity. Sub-rankings for each country were based on the aggregate total of all the attributes comprising that sub-ranking. The destination's sub-rankings were equally weighted to obtain the overall ranking.

For the second year in a row, the largest Caribbean destinations – Dominican Republic, Puerto Rico, Cuba, the Bahamas and Jamaica – rank highest in the total number of quality products and services, a function of their physical size, high volume of visitors and number of quality experiences that have been created.

## CHANGE IS CERTAINLY COMING TO AMERICA'S LONG LOST AND NEWFOUND NEIGHBOR. HOW WILL CUBA COPE WITH THE SURGE OF TRAVELERS, AND WILL IT LOSE ITS AUTHENTICITY?

The Dominican Republic maintains its grip on hotels and flights, ranking first overall in both categories. No fewer than seven international airports serving major carriers from the U.S. and elsewhere maintain volume. The DR's reputation as the mecca of accommodation in the Caribbean is also upheld; 21 of 25 of the region's highest-rated hotels in general based on visitor volume are here. On the luxury front, last year's opening of the spectacular Amanera Resort has set the bar for the high end.

### *Absolute Ranking - Top 10*

- 01 Dominican Republic
- 02 Puerto Rico
- 03 Cuba
- 04 Bahamas
- 05 Jamaica
- 06 Barbados
- 07 Aruba
- 08 U.S. Virgin Islands
- 09 Guadeloupe
- 10 Cayman Islands



Puerto Rico is basically on the verge of bankruptcy and dealing with the Zika virus. But can tourism save it? The top-ranked country for restaurants and sightseeing, Puerto Rico also placed in the top five in 11 of 12 categories. Consistency of quality is what Puerto Rico does right, and 2015 was a banner year. The country has added 1,000 new hotel rooms since 2013, resulting in a record 15,000 available rooms. Its hotels achieved a record 71 percent occupancy rate last year, and a record 1.5 million cruise passengers visited Puerto Rico by sea, an increase of more than 45 percent from 2013.

2016 will be remembered as the year Cuba and the U.S. patched up their differences, and the world will watch its impact on travel and tourism for years to come. Cuba is a mainstay in our rankings thanks to its museums, landmarks, performances, and in large part to its low crime rate; it's the only country in the top five to rank among the lowest in crime (third overall). But change is certainly coming to America's long lost and newfound neighbor. How will the country cope with the surge of travelers, and will it lose its authenticity?

The Bahamas leapfrogged Jamaica in this year's Absolute Ranking. While the Baha Mar bankruptcy means there won't be a mega-resort anytime soon, it still attracts the second highest number of visitors to the Caribbean, and ranks first overall for food and drink experiences, such as food and brewery tours, cooking classes and bustling food markets.

Jamaica dropped a spot in our Absolute Ranking despite a five percent increase in visits over last year. It also ranks in the top three among hotels, flights, and food and drink, but is hurt by crime. It's the 26th safest out of the 28 Caribbean countries.





Rank	Destination	Culture	Entertainment	Sightseeing	Sports & Adventure	Culinary	Lodging	Connectivity	Safety
1	Dominican Republic	3	1	2	2	2	1	1	20
2	Puerto Rico	2	2	1	3	1	5	4	22
3	Cuba	1	4	6	18	3	4	2	3
4	Bahamas	4	6	5	4	4	3	4	24
5	Jamaica	6	8	4	6	5	2	3	26
6	Barbados	7	9	9	8	9	6	13	5
7	Aruba	9	6	11	12	10	14	6	2
8	U.S. Virgin Islands	8	3	3	1	7	16	11	27
9	Guadeloupe	9	13	10	7	6	10	21	10
10	Cayman Islands	9	11	7	5	11	19	9	16
11	Turks & Caicos Islands	14	16	13	10	20	7	11	4
12	Sint Maarten	19	5	19	13	12	16	7	8
13	Bermuda	5	10	12	16	18	25	13	7
14	Saint Lucia	21	12	8	9	16	8	15	19
15	Martinique	13	17	15	14	8	23	18	1
16	Curacao	12	15	13	11	14	21	9	15
17	Antigua & Barbuda	14	14	16	17	19	11	15	13
18	British Virgin Islands	17	20	17	15	17	15	23	9
19	Trinidad & Tobago	14	18	18	21	13	27	7	23
20	Grenada	17	22	21	23	21	12	19	14
21	Saint Martin	19	18	25	20	15	19	23	17
22	Haiti	25	26	27	28	23	9	17	11
23	Anguilla	23	25	26	27	23	16	23	6
24	Saint Vincent & The Grenadines	23	26	24	25	26	12	23	21
25	Saint Kitts & Nevis	22	21	22	22	22	27	22	25
26	Saint Barthelemy	25	22	27	26	28	21	23	12
27	Bonaire	27	24	20	19	25	24	19	28
28	Dominica	27	28	22	24	27	26	23	18

# INDEXED RANKING

A long, perspective view of a covered walkway. The walls are bright yellow, and the columns are painted blue. The walkway is paved with light-colored tiles. In the distance, there is an arched opening leading to another part of the building. The lighting is bright, suggesting a sunny day.



Our Indexed Ranking gives a clear picture of how smaller countries perform by ranking results based on how many very good or excellent experiences each destination offers per hundred thousand visitors, instead of just the total number of high-quality experiences. This creates a level playing field between destinations that are large in size and tourism volume and those that are smaller in both.

From that perspective, the tiny island of Anguilla, 15,000 strong, helps lead the way.

Ranking best overall for hotels and second for food and drink and restaurants, Anguilla's ability to attract the high net worth traveler with high quality experiences brought its ranking up from fifth in last year's indexed ranking to a tie for second. The development of luxury resorts certainly helped: Viceroy Anguilla has been joined by CéBlue Villas and Beach Resort, an Auberge-flagged and renovated Malliouhana Resort, and the Zemi Beach House, which opened in February 2016. Anguilla manages to provide both exclusivity, beautiful new hotels, and a barefoot-casual atmosphere. This is all good news in a country that relies so heavily on tourism, ranking seventh globally for Travel and Tourism's total contribution to GDP.

**WITH THE HIGHEST PERFORMING TOURISM EXPERIENCES IN BOTH RANKINGS, PUERTO RICO IS DOING TOURISM RIGHT EVEN IF ITS FINANCIAL SITUATION WOULD INDICATE THAT IT'S DOING MANY OTHER THINGS WRONG.**

Top ranked Saint Martin boasts the most top-ranked indexed categories with six – museums, shopping, nightlife, sightseeing, outdoors, and restaurants.

Tied for second overall in our Indexed Ranking, Saint Vincent and The Grenadines is a sanctuary for boaters, boasting some of the most gorgeous scenery in the Caribbean across a string of 36 emerald volcanic islands. The capital of Kingstown offers cobbled streets and colonial buildings, while Union Island is the southern gateway to the Grenadines.

Saint Vincent and The Grenadines saw a 5.4% increase in total stopover arrivals in 2015 as well as a 9.2% increase in arrivals from the U.S according to the CTO. We expect

### *Indexed Ranking - Top 10*

- 01** Saint Martin
- T-02** Saint Vincent & The Grenadines
- T-02** Anguilla
- 04** Bermuda
- 05** Barbados
- 06** Puerto Rico
- 07** Guadeloupe
- 08** Grenada
- 09** Trinidad & Tobago
- 10** Martinique



those numbers to rise once the country's \$240 million Argyle International Airport opens, offering non-stop jet service from North America, Central and South America, and Europe. Currently, U.S. cities New York, Atlanta, Miami & Charlotte offer service into SVG.

Despite a 14 percent increase in visitors, and breaking the country's all time tourism records during the first half of 2015 with more than 300,000 long-stay visitors, Barbados drops three spots from second to fifth in our Indexed Ranking. Its favorable ranking in crime (5th), food and drink (3rd) and nightlife (4th) keeps it in the top five. The culinary scene has always been a staple and the heralded Barbados Food & Wine and Rum Festival returns for its seventh year in 2016.

The Je ne sais quoi of the Caribbean, Guadeloupe is a mix of Caribbean cool and French chic that climbed from last year's 15 spot to number seven this year. Guadeloupe's Pointe-à-Pitre port reported a 50 percent increase in sea passengers from 2014-2015, reaching 320,000 visitors. And with the addition of four new cruise ships, the port forecasts more than 400,000 passengers by the end of the 2015/2016 season. The French-owned region relies on France for more than 60 percent of its air passengers, but in late 2015, Norwegian Air began serving Guadeloupe with seven new weekly non-stop flights from New York, Boston,

Baltimore and Washington D.C. The hope is to build upon the 29 percent increase of U.S. travelers to the island since 2012.

Perhaps unsurprisingly for a French region, Guadeloupe ranks fifth overall for restaurants, and sixth in the Absolute culinary ranking behind only Puerto Rico, Dominican, Cuba, Bahamas and Jamaica.

With the highest performing tourism experiences in both rankings, Puerto Rico is doing tourism right even if its financial situation would indicate that it's doing many other things wrong. Moving up from 19 last year to number five this year, it ranks in the top 10 in nine of 12 categories. It's also the only country in the top five to rank inside the top 15 for flights (4th). In 2015 it added 10 new airlines and eight new destinations. The Puerto Rico Tourism Company (PRTC) reported an overall strong 2015 with more than five million visitors at its airports and seaports. The result was an increase of visitor spending to \$3.82 billion, up 20 percent from 2012.

The Zika scare could influence these numbers. The latest reports confirm one death and 785 cases of Zika in Puerto Rico. Coupled with the country's \$70 billion debt crisis and responding to health-care cuts, Puerto Rico's tourism industry will be challenged.





Rank	Destination	Culture	Entertainment	Sightseeing	Sports & Adventure	Culinary	Lodging	Connectivity	Safety
1	Saint Martin	1	1	2	1	1	2	23	17
T-2	Saint Vincent & The Grenadines	3	7	1	3	3	1	23	21
T-2	Anguilla	6	3	10	7	4	3	23	6
4	Bermuda	2	2	5	6	12	19	13	7
5	Barbados	9	4	11	10	10	5	13	5
6	Puerto Rico	5	5	8	9	2	15	4	22
7	Guadeloupe	11	10	12	4	5	13	21	10
8	Grenada	7	18	6	11	8	4	19	14
9	Trinidad & Tobago	8	9	7	14	6	20	7	23
10	Martinique	10	17	13	8	7	21	18	1
T-11	Cuba	4	14	21	27	11	17	2	3
T-11	Bonaire	19	12	3	2	9	7	19	28
13	Turks & Caicos Islands	14	21	17	15	24	8	11	4
T-14	Antigua & Barbuda	13	11	15	19	19	14	15	13
T-14	Aruba	17	8	22	22	18	24	6	2
16	Curacao	12	19	16	16	15	23	9	15
17	Saint Lucia	23	15	9	13	21	12	15	19
18	Saint Barthelemy	15	13	25	20	14	6	23	12
19	Dominica	22	28	4	12	13	9	23	18
20	Dominican Republic	18	20	23	21	16	11	1	20
21	U.S. Virgin Islands	25	6	14	5	23	28	11	27
22	British Virgin Islands	16	22	18	17	20	18	23	9
23	Jamaica	24	23	20	23	22	10	3	26
24	Cayman Islands	20	24	19	18	25	26	9	16
25	Bahamas	21	25	26	25	17	22	4	24
26	Sint Maarten	27	16	27	26	27	27	7	8
27	Haiti	28	27	28	28	28	16	17	11
28	Saint Kitts & Nevis	26	26	24	24	26	25	22	25



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