

Caribbean Tourism Report Q3 2016

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Abstracts

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BMI View: Arrivals growth in the Caribbean will pick up to 2.5% in 2016, reflecting improved visitor numbers from Europe and North America. The Dominican Republic, St Eustatius and Cuba are expecting the highest rate of arrivals growth, but all tourism markets except St Vincent will experience growth in 2016. However, the outbreak of the Zika virus from late 2015 could pose downside risks to 2016 arrivals forecasts.

We currently expect arrivals to the Caribbean to grow by 2.5% in 2016, to 33.5mn, reflecting an improvement from growth of only 0.7% in 2015. We expect the Dominican Republic, Cuba, St Eustatius and St Lucia to post the highest level of arrivals growth in 2016, at around 6%, but we note the positive sign that all Caribbean countries except St Vincent will experience arrivals growth in 2016, for the first time since the downturn.

We hold an especially positive outlook on Cuba, given steady progress in the renewal of relations with the US. This has already reaped benefits in terms of tourism, transport and hotel developments. President Obama has relaxed long-standing restrictions on US nationals visiting Cuba, meaning that Cuba can expect to benefit from increased US tourism. In addition, an aviation agreement signed in early 2016 paves the way for direct US-Cuba commercial flights, while a ferry service between Florida and Cuba. Moreover, in April, US hotel companies Starwood and Marriott announced plans to expand into the Cuban hotel sector. Altogether, we believe that this paves the way for long-term US investment into Cuba's hotel sector, which will present considerable opportunities over the forecast period.

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