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CARIBBEAN TOURISM PERFORMANCE REVIEW



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Preface

This report analyzes tourism performance in the Caribbean during the first three quarters of 2024. The findings are based on data from Caribbean destinations, international agencies, and industry partners. This review offers insights into visitor arrival and emerging trends and aims to support strategic planning to enhance the region’s tourism sector.

1. Global Tourism Performance

The latest World Tourism Organization (UN Tourism) Barometer determined that international tourism has nearly fully rebounded from the effects of the pandemic. Data from UN Tourism indicated that globally international arrival figures reached 98.2% of pre-pandemic levels for the first nine months of 2024, compared to around 86.9% for the same period of 2023 marking a significant increase from previous years.

Approximately 1.1 billion international tourist arrivals were recorded between January and September, an approximate increase of 11.0% over 2023. This recovery has been driven by robust demand across most regions, the resurgence of Asia Pacific destinations, expanded air connectivity, and visa facilitation.

The Middle East led global tourism growth, with international arrivals surpassing pre-pandemic levels by 29.1%, supported by strong performances in several countries. Key factors contributing to these gains included visa facilitation, investment in major tourism projects, enhanced air capacity, effective marketing, and event hosting.

Europe, the largest tourism region, achieved a 1.4% rise over pre-pandemic arrivals in the first nine months of 2024. While Africa saw a 5.9% rise in tourist arrivals in the same comparative period.

International tourist trips in the Americas reached 94.5% of pre-pandemic levels, driven by robust demand from within the region. In Asia and the Pacific, tourism’s recovery accelerated, reaching 84.9% of 2019 levels by the end of September 2024, up from 65% in 2023. Growth in this region was supported by favourable exchange rates and restored market access.

The Caribbean has shown robust growth, with arrivals surpassing pre-pandemic levels by 5.9% for the January to September period. (Please see Table 1.1 and Figure 1.1.)

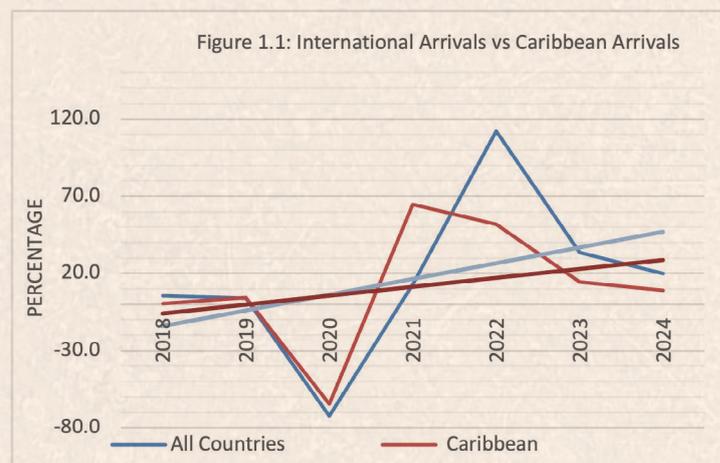
Table 1.1: Performance of International Tourist Arrivals by Region

	2020	2021	2022	2023 ^R	2024 [*]	24/19 ^{**}
	Change					
World	-72.3%	13.1%	112.2%	33.4%	19.8%	-1.8%
Europe	-67.7%	25.7%	102.5%	16.4%	10.4%	1.4%
Asia and the Pacific	-83.7%	-54.8%	250.4%	154.2%	60.8%	-15.1%
Americas	-68.2%	17.2%	92.2%	27.4%	10.6%	-3.5%
Caribbean ^R	-64.7%	64.7%	51.7%	14.3%	9.1%	5.9%
Africa	-72.7%	5.4%	136.6%	41.2%	12.6%	5.9%
Middle East	-72.8%	55.9%	124.5%	28.3%	3.6%	29.1%

Notes: R – revised, * Jan to Mar 2024 vs 2023, ** Jan to Sep 2024 vs 2019

Sources: UNWTO, CTO

Figure 1.1: International Arrivals vs Caribbean Arrivals



2. Caribbean Tourism Performance¹

2.1. Tourist (Stop-Over) Arrivals

Tourism in the Caribbean continued to grow within forecast ranges throughout the first nine months of the year, driven by sustained strong travel demand from the United States and increasing demand from Canada. This growth was further supported by enhanced air connectivity, including new routes and increased flight frequencies, as well as diversification efforts aimed at reducing seasonality. The sector's performance was achieved despite the myriad challenges the industry has faced including a notably active 2024 hurricane² season that produced the earliest formed Category 5 Atlantic hurricane and several other powerful storms.

Based on the estimates, the Caribbean region welcomed approximately 26.0³ 4 million international tourist arrivals between January and September. This increase is equivalent to 6.7% or 1.6 million more trips compared to the corresponding period in 2023. The year-to-date total arrivals not only surpassed those in all previous comparable periods but also exceeded that for the benchmark year of 2019 by 5.9%. Further details can be found in Table 2.1.1.

Preliminary figures for the first nine months of 2024 reveal that monthly tourist arrivals consistently outperformed those of the corresponding months in 2023, with increases ranging between 2.6% and 10.5%. This sustained momentum has resulted in 42 consecutive months of year-on-year increases in tourist arrivals.

Additionally, since June 2023, monthly arrivals have constantly surpassed the levels set in 2019, with one exception—April 2024. In that month, arrivals reached 97.5% of April 2019 levels, slightly falling short of full recovery. This trend highlights the region's strong post-pandemic recovery trajectory and its resilience in the global tourism landscape.

Of the quarters completed so far, the Caribbean experienced its strongest growth during the first quarter with 9.6 million

tourist visits — a 9.2% increase compared to the first quarter in 2023 and 4.2% above the first three months in 2019. This strong start to the year reflected high travel demand during the peak winter season and the celebration of Easter at the end of the period. Overall arrivals in the winter season⁵ grew by 7.6% and totalled 12.5 million visits.

There was also strong growth during the second quarter in which 8.4 million international arrivals were recorded. June showed the strongest performance within the quarter, with arrivals increasing 8.1% year-on-year and exceeding 2019 levels by 10.7%. However, in April arrivals fell below 2019 levels by -2.5%, although they grew by 2.6% compared to April 2023.

Despite the disruption caused by multiple hurricanes and storms, including Hurricane Beryl, which affected several destinations in early July, tourist arrivals in the third quarter reached 7.8 million. This represents an increase of 4.4% compared to the same period in 2023 and a significant 10.3% growth compared to 2019. Notably, September, traditionally part of the region's low season, recorded the highest growth relative to 2019, with arrivals surging by 18.3%.

¹ The information is provisional and is subject to change.

² <https://www.climate.gov/news-features/event-tracker/category-5-hurricane-beryl-makes-explosive-start-2024-atlantic-season>

³ Of the 33 destinations, 26 provided data for at least one month of the year. Among them, 20 destinations submitted complete data from January to September, while one provided information covering January to July. Additionally, three destinations reported tourism data from January to June,

and one destination each submitted data for January to April and January to February.

⁴ CTO estimates are used for non-reporting destinations. The numbers in this report are therefore preliminary.

⁵ Winter is approximated by the January to April period and Summer by May to December.

Table 2.1.1: Monthly Tourist Arrivals (000s)

Month	2023 ⁱ	2024 ^e	%CH 24/23	%CH 24/19
JAN	2,814.5	3,019.8	7.3	3.2
FEB	2,852.8	3,129.2	9.7	6.4
MAR	3,166.5	3,500.0	10.5	3.2
QTR 1	8,833.8	9,649.0	9.2	4.2
APR	2,784.9	2,856.6	2.6	-2.5
MAY	2,525.6	2,723.6	7.8	4.1
JUN	2,735.3	2,956.4	8.1	10.7
QTR 2	8,045.7	8,536.5	6.1	3.9
JUL	2,982.9	3,095.6	3.8	8.1
AUG	2,581.4	2,722.3	5.5	7.6
SEP	1,898.3	1,974.9	4.0	18.3
QTR 3	7,462.7	7,792.7	4.4	10.3
YTD	24,342.2	25,978.2	6.7	5.9

Note: Imputed from data on international travel to member countries.

Source: CTO Member Countries and CTO estimates.

Tourist arrivals to the Caribbean in 2024 showed varying levels of recovery and growth, with most destinations experiencing increases compared to 2023. Smaller destinations generally showed strong percentage growth, while larger destinations attracted most visitors, although some still lag their pre-pandemic performance.

Against 2023, most destinations reported growth in tourist arrivals, with 23 out of 26 destinations showing increases. The year-on-year growth ranged from 0.3% in Jamaica to 29.4% in Montserrat, reflecting widespread sustained demand. Only three destinations—Martinique (-2.7%), Bahamas (-2.8%), and Cuba (-5.2%)—recorded contractions, indicating localized challenges in these destinations.

The strong growth across destinations highlights the region’s continued rebound from pandemic disruptions. Compared to the pre-pandemic levels of tourist arrivals in 2019, 16 destinations recorded growth, one fewer than at the half year.

In these destinations, increases ranged from 0.6% in the British Virgin Islands to 54.4% in the Turks & Caicos Islands, with 14 destinations experiencing double-digit growth. This strong growth reflects the success of diversification strategies and expanded tourism offerings in these destinations.

In contrast, ten destinations reported contractions, with declines ranging from -2.0% in Martinique to a -48.3% in Cuba. Other destinations with notable decreases included Bermuda (-26.4%), St. Kitts & Nevis (-16.8%), Trinidad & Tobago (-15.8%), the Cayman Islands (-14.4%) and Montserrat (-13.7%). Additional details are found in Table A1 and Figures 2.1.3 and 2.1.4.

Figure 2.1.1: Monthly Changes in Tourist Arrivals (Y-o-Y)

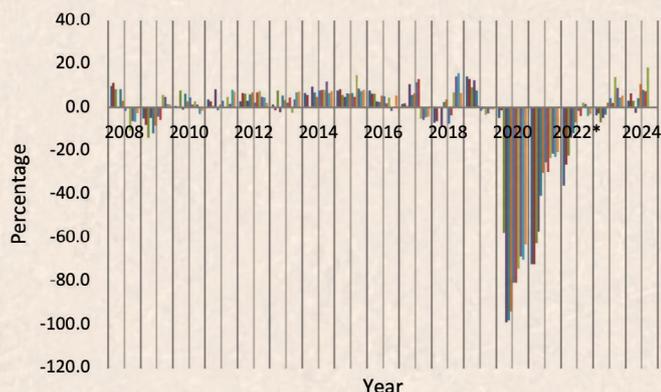
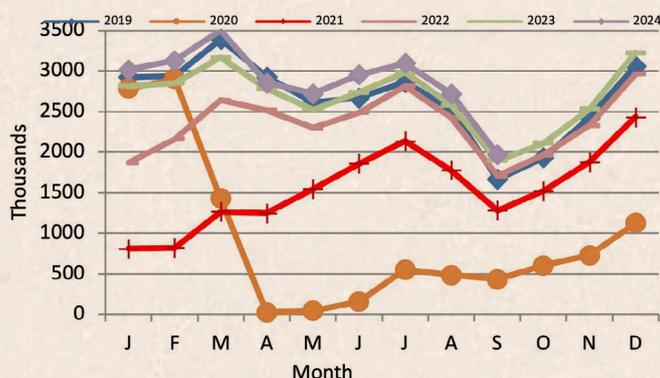
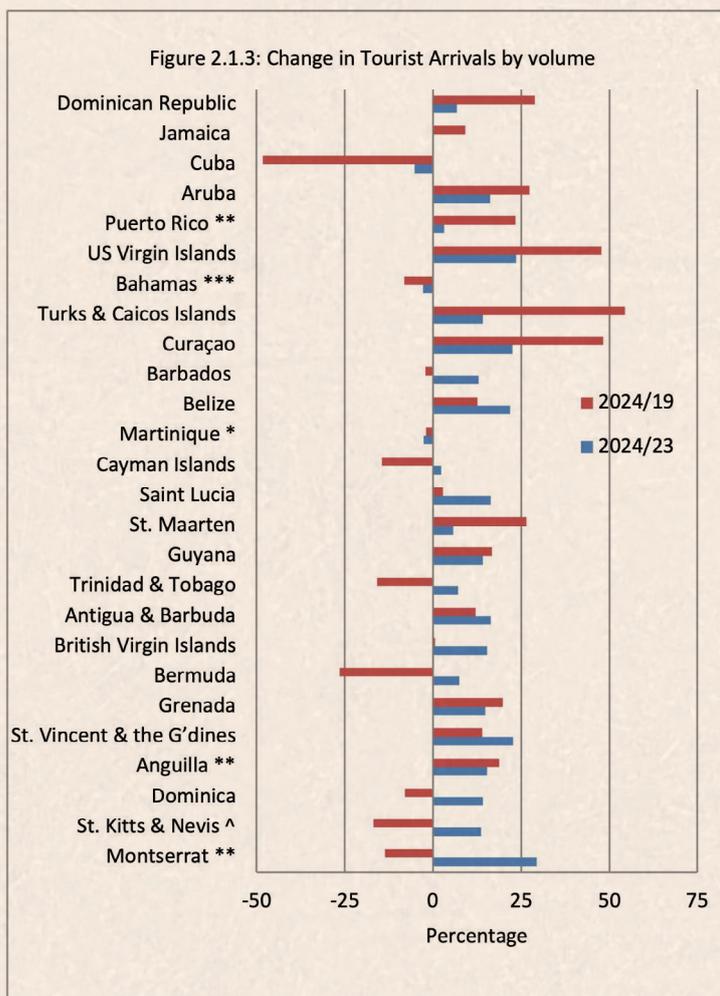


Figure 2.1.2: Monthly Tourist (Stop-Over) Arrivals 2019-2024





increase. The tourist arrivals during the period were 1.3 million visitors and the market share expanded marginally as the tourist visits continued to recover beyond 2019 levels, showing a 4.6% increase compared to that year.

The performances in the other sub-regions were more moderate. The Other Caribbean Countries saw a 7.1% increase in tourist arrivals and reached nearly 11.8 million visitors, the most (45.3% of total arrivals) in any Caribbean region. However, this sub-region has not yet fully regained its pre-pandemic visitor levels, showing a slight falloff of -1.7% compared to 2019.

The US Territories and other Commonwealth countries saw more modest growth rates of 5.4% and 3.9%, respectively, over 2023. The US Territories attracted just under 4.0 million visitors, while the Commonwealth countries received 7.1 million. Both sub-regions also outperformed their 2019 arrival levels, with 26.5% and 3.2% increases, respectively.

In contrast, the French Caribbean saw an estimated decline of -1.4% in visitor arrivals, dropping slightly to 0.9 million. The sub-region also remained below 2019 levels, down -1.5%, as it moves closer to full recovery. See Table 2.1.2 and Figure 2.1.5 for additional information.

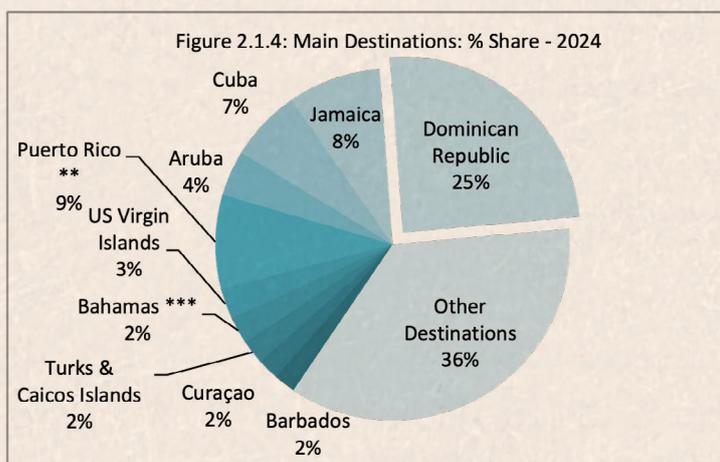


Table 2.1.2: Tourist Arrivals to the Caribbean by Sub-region (000s) – ending September

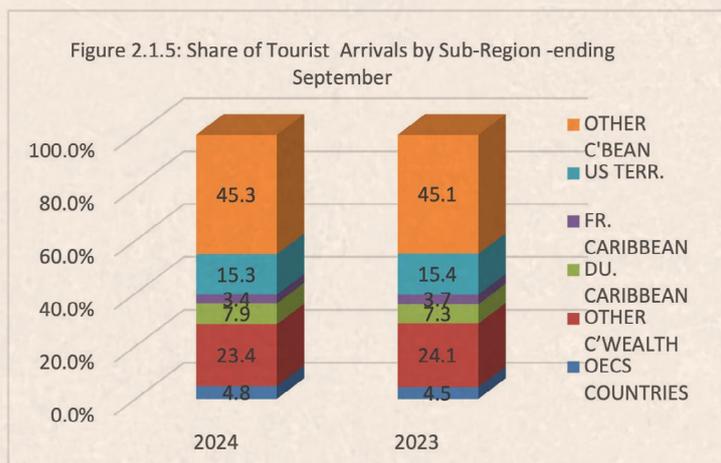
SUB-REGION	2023e	2024e	% CH
COMMONWEALTH CARIBBEAN	6,942.3	7,338.4	5.7
OECS COUNTRIES	1,087.0	1,256.4	15.6
OTHER C'WLTH COUNTRIES	5,855.4	6,082.0	3.9
DUTCH CARIBBEAN	1,772.3	2,040.2	15.1
FRENCH CARIBBEAN	890.0	877.6	-1.4
US TERRITORIES	3,760.2	3,962.7	5.4
OTHER CARIBBEAN COUNTRIES	10,977.3	11,759.4	7.1
TOTAL CARIBBEAN	24,342.2	25,978.2	6.7
of which CARICOM	5,960.6	6,252.5	4.9

Note: Imputed from data on international travel to member countries.
Source: CTO Member Countries and CTO estimates.

Notes: * Jan-Jul ** Jan- Jun *** Jan-Apr ^ Jan-Feb

At a subregional level, the Dutch Caribbean, led by Aruba and Curaçao, saw its market share rise by 0.6 percentage points, driven by a 15.1% increase in tourist arrivals, reaching approximately 2.0 million visitors in the first nine months of 2024. This sub-region also surpassed pre-pandemic levels, with arrivals 39.4% higher than in 2019.

However, the OECS Countries recorded the strongest growth among the sub-regions compared to 2023, with a 15.6%



The analysis of the primary tourism markets for the Caribbean, as detailed in Table 2.1.3, highlights the sector’s continued recovery and growth. These preliminary figures closely align with the trends identified in the first half of the year. High travel demand, supported by increased air connectivity, strong economic conditions in the United States—the region’s primary source market—and favourable exchange rates were crucial in maintaining a steady flow of visitors.

However, while economic conditions have improved in Canada and Europe, outbound travel from these regions has largely remained internal or confined to their respective areas. Consequently, visitor numbers from Canada and Europe to the Caribbean have not rebounded to pre-crisis levels as yet. Despite this, consistent growth has been observed in tourism originating from South America and within the Caribbean itself during the first nine months of the year.

United States

In the first nine months of 2024, the U.S. economy performed strongly, exceeding expectations for a potential slowdown. Despite some affordability challenges in sectors such as housing, travel spending remained a top priority for American consumers. Growth in disposable income and easing inflation supported Americans’ ability and willingness to travel internationally, particularly to regions like the Caribbean.

According to the International Trade Administration (ITA)⁶, outbound travel from the United States grew by 11.3% to destinations, excluding Canada and Mexico, in the first six months of this year. The ITA data showed that outbound

trips to the Caribbean rose by 9.9% during the same period, totalling 6.1 million trips. This figure was only exceeded by the 10.2 million trips made by Americans to Europe.

From destination data, the region saw an estimated 4.7% increase in American tourists, with arrivals totalling 13.0 million in the first nine months of the year. This figure marked the highest for this period in any year and surpassed 2019 levels by 6.0%.

Despite this overall growth, quarterly increases from the U.S. market have been slowing. The first two quarters recorded growth rates of 9.5% and 3.1%, respectively. However, growth in the third quarter was reduced to 1.6%, largely due to strong monthly arrivals in the previous year and the impact of hurricanes in September.

Among the 22 destinations reporting tourist arrivals, the Dominican Republic, Jamaica, and Aruba led in visitor numbers from this market. The Dominican Republic and Aruba recorded strong growth of 10.3% and 14.6%, respectively, contributing to the 19 destinations that experienced increased arrivals. In contrast, Jamaica observed a slight decline of -2.7%, highlighting mixed performance.

Growth rates for other destinations varied widely, from a modest 2.0% in the Cayman Islands to a 32.5% surge in Barbados. On the other hand, declines were noted in The Bahamas and Cuba, which experienced reductions of -8.9% and -12.7%, respectively, reflecting localized challenges in attracting visitors.

During the review period, 14 reporting destinations, including the top three most visited destinations, recorded more American stay-over visitors compared to 2019. Leading the recovery was Curaçao, with a 130.3% increase over 2019 levels. This was followed by Guyana (72.1%), Dominica (46.1%), Antigua & Barbuda (42.2%), and St. Maarten (41.3%). For the remaining nine destinations, increases in American visitors ranged from 1.4% in Barbados to 39.7% in Grenada. Conversely, eight destinations fell short of their pre-pandemic arrival levels, with arrivals from the US reaching between 25.3% of 2019 levels in Cuba and 96.4% in Montserrat.

⁶ <https://www.trade.gov/us-international-air-travel-statistics-i-92-data>

Table 2.1.3: Tourist Arrivals to the Caribbean by Main Market

('000) – ending September						
MARKETS	2020	2021	2022	2023	2024	%ch 24/23
Total Arrivals	8,825.5	12,753.2	20,930.2	24,342.2	25,978.2	6.7
United States	4,093.5	8,343.4	11,009.6	12,415.4	13,004.9	4.7
Canada	1,244.3	133.7	1,196.9	2,144.9	2,304.2	7.4
Europe	1,841.8	1,519.1	3,738.7	3,733.7	3,815.0	2.2
UK*	229.3	113.7	717.4	728.2	736.7	1.5
Germany*	95.3	62.2	203.5	189.7	186.5	-1.7
Caribbean*	200.4	295.7	665.6	877.2	915.1	4.3
South America*	207.3	355.2	860.1	1,034.3	1,212.6	17.2
Other	1,238.2	2,106.1	3,459.3	4,136.7	4,726.5	14.3

Note: Imputed from data on international travel to member countries. * Limited data available
Source: CTO Member Countries and CTO estimates.

Canada

The Canadian economy has shown signs of moderate recovery, supported by job growth, increased government spending, and higher consumer confidence. These factors contributed to rising outbound travel, reflecting pent-up demand and easing inflation pressures.

Compared to other primary source markets for Caribbean destinations, the Canadian market experienced the greatest expansion at the end of the first three quarters of 2024, with an increase of 7.4% compared to the same period a year ago. This resulted in an estimated 2.3 million Canadians visiting the region. Despite this, the region regained 88.5% of its tourist numbers compared to the same timeframe in 2019.

Monthly arrivals from Canada have been such that quarterly growth rates increased at a decreasing rate, allowing the pre-pandemic levels to be surpassed only in the third quarter. Growth rates of 11.5%, 4.7%, and 0.7% were achieved in the respective quarters. When compared to 2019, arrivals in the first quarter of 2024 reached 88.3% of the total for the same period, while the second quarter saw 80.1%. In the third quarter, arrivals exceeded those from 2019 by 2.2%.

For the first nine months of 2024, 18 out of 22 reporting Caribbean destinations saw an increase in Canadian visitors compared to 2023. Growth ranged from a modest 0.4% in Trinidad & Tobago to a 27.1% jump in St. Vincent & the Grenadines. However, four destinations experienced

declines in Canadian arrivals, with decreases ranging from -2.0% in Cuba to -25.2% in Montserrat. Despite its decline, Cuba remained the second most visited destination by Canadians, while the Dominican Republic led overall, welcoming approximately 0.72 million visitors. Rounding out the top five were Jamaica, Barbados, and The Bahamas.

Compared to 2019, ten regional destinations fully recovered their Canadian visitor arrivals, with notable growth observed in St. Maarten and Guyana, where arrivals increased by 42.6% and 42.4%, respectively. Other destinations experiencing growth recorded gains ranging from 1.4% in Dominica and Grenada to 34.2% in Guyana. Canadian arrivals to Jamaica remained unchanged from 2019 levels, while the remaining destinations saw arrivals ranging between 54.0% of pre-crisis levels in Cuba and 99.7% in St. Maarten.

Europe

A full recovery of the European outbound remains elusive. Persistent economic uncertainties and geopolitical headwinds continue to challenge the sustained recovery of the sector, which traditionally relies significantly on intra-regional travel.

Arrivals from this market reached 3.8 million in the first nine months of 2024, reflecting a modest 2.2% increase compared to the same period in 2023. However, this figure represents only 86.8% of the pre-pandemic levels seen in 2019, highlighting the slower recovery of long-haul international travel.

The European market's quarterly growth trends have been inconsistent. The first quarter was the strongest, with a notable 6.6% increase in arrivals compared to the same period in 2019. However, the following quarters showed weaker performances. The second quarter saw a modest 3.5% increase, while the third quarter experienced a contraction of -4.0%. Notably, March was the only month in 2024 where arrival levels surpassed those of 2019.

Among the 22 reporting destinations, 14 experienced increased tourist arrivals during the first nine months of 2024. The most significant growth was observed in Turks & Caicos Islands (52.4%), Montserrat (33.4%), The Bahamas (27.5%), Curaçao (21.7%), and Dominica (18.4%). Conversely, eight destinations reported declines in arrivals, ranging from -2.0% in Barbados to -8.5% in Cuba. This group

contained three (Dominican Republic, Cuba and Barbados) of this market's top five primary destinations, receiving approximately 0.8 million, 0.3 million, and 0.2 million tourist visits, respectively.

During this period, six of the 21 reporting destinations exceeded their pre-pandemic arrival levels from Europe, with growth ranging from 4.6% in Grenada to an impressive 54.4% in Guyana. However, arrivals to the remaining 15 destinations lagged behind 2019 figures, with performance accounting for between 47.5% in Cuba and 99.6% in Montserrat of those figures.

The data on arrivals from the eight main European countries revealed that only in the Swedish market did more destinations report declines than increases. For most markets, between 55.6% (Germany) and 75.0% (the United Kingdom and France) of destinations experienced growth compared to 2023. Notably, Cuba—a key destination for these markets—saw a decrease in arrivals from all eight European countries. In contrast, the Cayman Islands and Curaçao stood out as the only destinations to record increases across all markets.

Two key European source markets have shown contrasting outcomes so far. Arrivals from the United Kingdom increased by 2.5%, reaching a total of 0.7 million visitors, while arrivals from Germany declined slightly by -0.2%, with 0.2 million Germans visiting the region.

The Caribbean and South America⁷

An increase in arrivals among CARICOM countries significantly boosted the overall performance of intra-regional travel. During the first nine months of 2024, trips within the region among reporting destinations were estimated to have grown by 4.3%, reaching 0.9 million. Leading the growth were St. Kitts & Nevis (42.9%), Montserrat (42.6%), Jamaica (28.8%), Saint Lucia (21.2%), and Guyana (19.1%). Of the 17 destinations that recorded increases, these stood out with the most substantial gains. However, declines were observed in Belize (-15.7%), Curaçao (-12.3%), and the Dominican Republic (-5.6%).

In parallel, the South American market maintained strong growth momentum. Following a robust mid-year increase of 19.4%, arrivals from South America continued to rise in

the third quarter, recording a 13.4% growth. This sustained expansion resulted in a 17.2% increase over the first nine months, with tourist arrivals estimated at 1.2 million—an increase of 0.2 million compared to the same period in 2023. The continent's improved political and economic stability and strong travel demand in key markets such as Argentina, Brazil, and Colombia contributed to these results.

2.2. Accommodation performance⁸

As global demand for travel stabilizes, the growth in occupancy rates across regions has started to slow, yet the Average Daily Rate (ADR) continued to rise in the first nine months of 2024, a trend also reflected in the Caribbean. According to data from hotel analytics firm STR, presented at CHICOS 2024, Caribbean hotel occupancy in September reached 67.0%, a 1.0% increase compared to the same month in 2023. The ADR rose by 5.0%, reaching US\$341.00, and revenue per available room (RevPAR) also increased by 6.0%, amounting to US\$229.00.

Similarly, the short-term rental accommodation sector in the Caribbean has shown strong performance. Data collected by the CTO and provided by Airbnb for 24 destinations in the region revealed that by the end of June 2024, there were an estimated 73,400 active listings, a 9.9% increase from June 2023. The number of guest check-ins rose by 21.6% during the first half of 2024, growing from 1.5 million in the same period of 2023 to 1.9 million. However, the average length of stay decreased by 3.1%, dropping to 4.1 days.

2.3. Caribbean Performance - Cruise Activity

The global cruise sector continues its upward growth trajectory, driven by increasing demand for new cruise ships and innovative itineraries. A notable factor in this resurgence is a significant rise in bookings from younger demographics⁹. Strong economic contributions and investments in innovative technologies and sustainable practices also bolstered the sector's recovery from the pandemic.

According to Table 2.3.1, the Caribbean region registered robust growth of 11.1% in cruise arrivals from January to September. Hence, the region had an estimated 24.6 million

⁷ The results from the Caribbean and South America are preliminary due to limited data.

⁸ The coverage of the accommodation sector by STR although not exhaustive has been increasing over the years and is indicative of the performance in the hotel sector.

⁹ <https://www.jpmorgan.com/insights/global-research/travel/cruise-outlook>

Table 2.3.1: Cruise Arrivals to the Caribbean

('000) – ending September							
	2020	2021	2022	2023	2024	%ch 24/23	%ch 24/19
Cruise Pax	8,521.1	713.0	12,328.4	22,129.1	24,585.5	11.1	12.4

Note: Imputed from data on international travel to member countries.
Source: CTO Member Countries and CTO estimates.

cruise visits during this period. This figure was also 12.4% more than in the corresponding period of 2019.

Preliminary data for the first nine months of 2024 indicated consistent growth in the Caribbean’s cruise tourism sector, with each month surpassing the performance of corresponding months in both 2023 and 2019. This underscored the sector’s sustained recovery and expansion. Compared to 2023, the increases were between 3.1% (March) and 25.3% (July) and compared to 2019 the strongest growth (20.7%) was observed in March, while January recorded the most modest increase (2.1%). Additional information is available in Table 2.3.2.

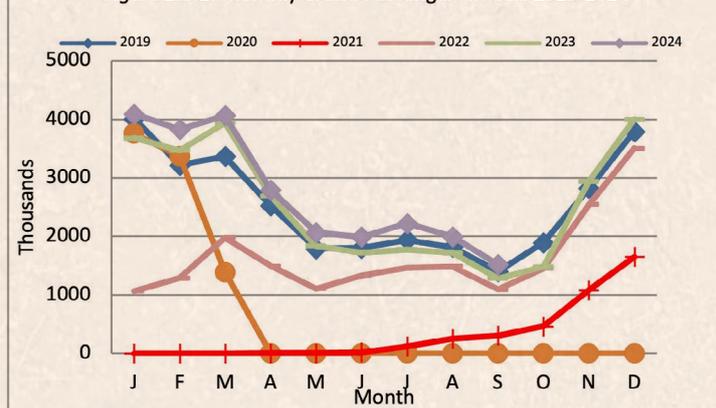
The exceptional performance in July played a key role in driving the third quarter of 2024 to become the strongest-performing period for the Caribbean cruise industry. The third quarter posted an average growth of 20.1%, a rate that doubled the increases seen in the first (8.0%) and second (9.7%) quarters. Despite the third quarter’s growth, all three quarters exhibited a close performance relative to 2019, with growth rates differing by just two percentage points. The first quarter (13.1%) marginally outperformed the second (12.1%) which outperformed the third (11.4%,).

Table 2.3.2: Monthly Cruise Arrivals ('000)

Month	2023	2024 ^e	%CH 24/23	%CH 24/19
JAN	3,631.7	4,093.7	11.2	2.1
FEB	3,471.2	3,828.7	10.3	19.0
MAR	3,943.4	4,065.6	3.1	20.7
QTR 1	11,096.3	11,988.1	8.0	13.1
APR	2,688.9	2,793.5	3.9	10.6
MAY	1,836.6	2,068.7	12.6	15.8
JUN	1,725.0	1,993.3	15.6	10.6
QTR 2	6,250.4	6,855.5	9.7	12.1
JUL	1,776.5	2,225.3	25.3	14.8
AUG	1,721.3	1,997.6	16.1	10.0
SEP	1,284.6	1,518.9	18.2	8.4
QTR 3	4,782.4	5,741.8	20.1	11.4
YTD	22,129.1	24,585.8	11.1	12.4

Source: CTO Member Countries and CTO estimates.

Figure 2.3.1: Monthly Cruise Passenger Arrivals 2019-2024



The 23 reporting Caribbean destinations showcased resilience and growth in the cruise sector during the 2024 review period, with most reporting positive outcomes. Cruise arrivals ranged from 91.2 thousand in Trinidad & Tobago to a region-leading 6.9 million in The Bahamas. Other high-volume destinations included Cozumel (Mexico) with 3.4 million visits, the Dominican Republic with 1.9 million, and the U.S. Virgin Islands with 1.2 million cruise visits. Significant numbers of cruise visitors also stopped in Jamaica, St. Maarten, and the Turks & Caicos Islands, each welcoming approximately 0.9 million visitors. Please see Appendix A1.

In terms of relative growth compared to 2023, Trinidad & Tobago led with a 31.8% increase, followed by the Turks & Caicos Islands (29.7%), Barbados (27.7%), Antigua & Barbuda (27.6%), and Curacao (22.3%). Conversely, a few destinations experienced declines, with contractions ranging from -1.6% in Grenada to -14.5% in the Cayman Islands.

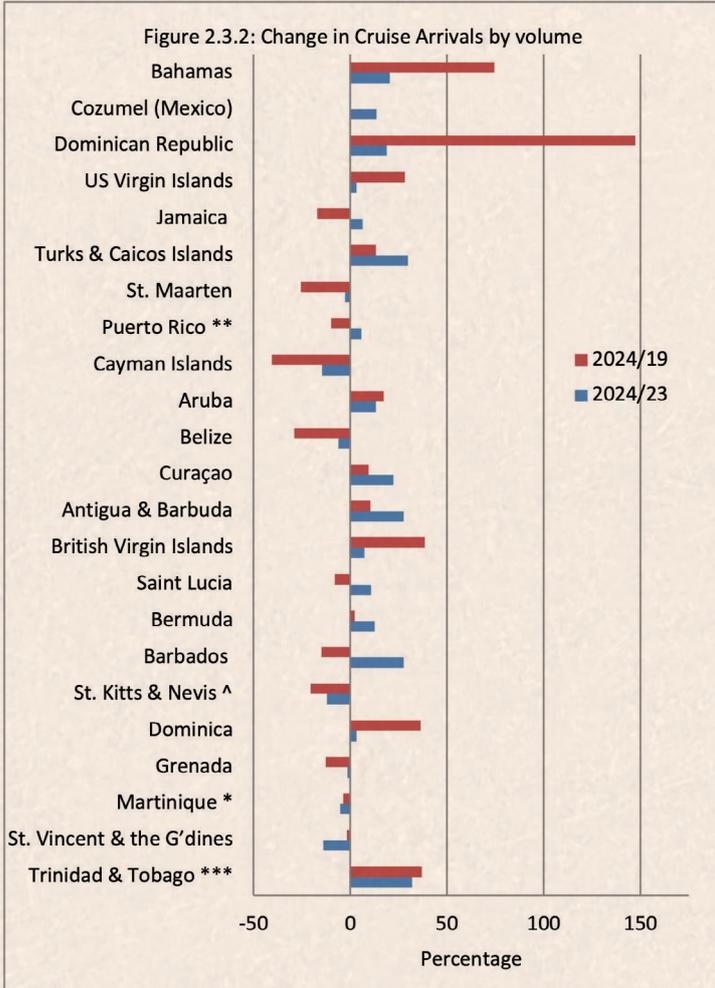
Twelve destinations surpassed their 2019 cruise visit numbers, with the Dominican Republic achieving a nearly threefold increase during this period. Other significant surges were recorded in The Bahamas (74.5%), the British Virgin Islands (38.5%), Trinidad & Tobago (37.1%), and Dominica (36.3%). However, eleven destinations have yet to recover fully to pre-pandemic levels. Among these, four destinations achieved at least 90% of their 2019 arrivals, while seven others recovered between 59.5% (Cayman Islands) and 87.4% (Grenada).

Regionally, the Northern Caribbean welcomed 8.3 million cruise visitors, followed by the Eastern Caribbean (7.5 million), the Western Caribbean (5.8 million), and the Southern Caribbean (3.0 million). Year-over-year, all regions showed growth, with increases of 20.9% in the

Northern Caribbean, 10.6% in the Southern Caribbean, 6.4% in the Eastern Caribbean, and 5.1% in the Western Caribbean. Compared to 2019, cruise visits surged by an estimated 58.8% in the Northern Caribbean, grew moderately by 8.7% in the Eastern Caribbean, and rose marginally by 0.8% in the Southern Caribbean, while there was -14.5% contraction in the Western Caribbean.

3. Aviation Performance

Global passenger traffic continued its strong recovery. According to the International Air Transport Association (IATA) international passenger traffic showed a strong performance during January to September 2024. International Revenue passenger kilometres (RPKs) rose by 14.7% in the period.

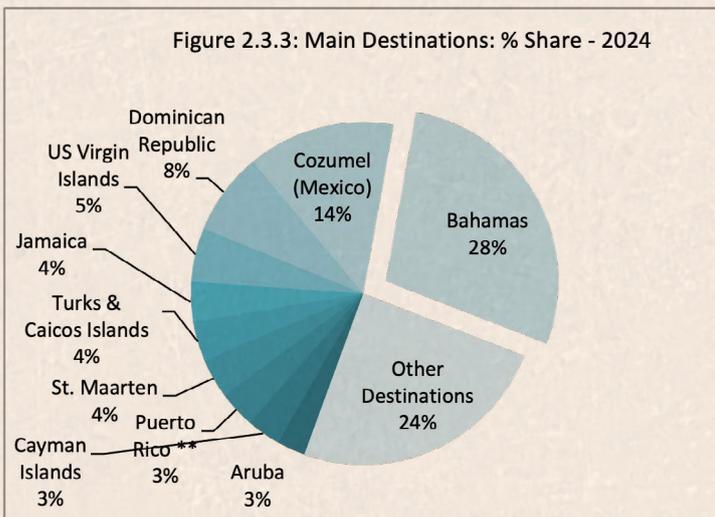


RPKs of airlines in Asia Pacific markets were strongest as the region progressed in its recovery. These airlines recorded growth rates of 29.5% compared to the same period in 2023.

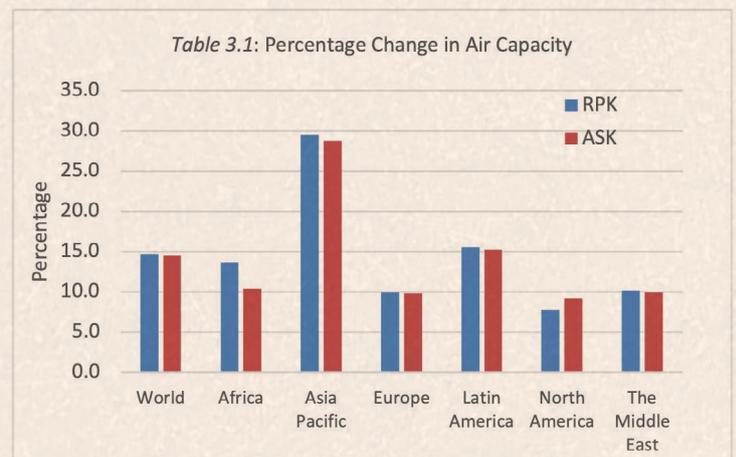
International RPKs by carriers in Latin America grew by 15.6% followed by airlines in Africa (10.4%). Carriers in the Middle East and Europe also achieved growth in international RPKs during the quarter, rising with 10.2% and 10.0% growth, respectively. Airlines based in North America recorded 7.8% growth during the period.

International available seat-kilometres (ASKs) grew by 14.5% at the end of third quarter of 2024 compared to the same period in 2023. Asia Pacific led growth as ASKs grew by 28.8% over the quarter. ASKs in Latin America grew by 15.3%, while Africa and the Middle East increased by 10.4% and 10.0% respectively while Europe and North America grew by 9.8% and 9.2%.

Passenger Load Factors (PLFs) reported during the period compared to the same period in 2023 remained relatively stable, with only a 0.2% increase recorded overall. While PLFs increased by 2.2% for airlines based in Africa, 0.4% for airlines based in Asia Pacific and 0.2% each for those in Europe, Latin America and Asia the Middle East. Carriers in North America recorded a -1.1% decline.



Notes: * Jan-Feb, ** Jan only



4. Outlook and Conclusion

The Caribbean tourism sector has shown remarkable resilience throughout 2024, navigating numerous challenges. While the region has experienced significant growth and recovery, several factors continue to shape its future. The year has seen a strong rebound from the pandemic, driven by a surge in travel demand and increased visitor arrivals.

However, economic uncertainties and geopolitical tensions have cast a shadow over the industry. These challenges were further compounded by the hurricane season which brought numerous storms and hurricanes to the region. Despite significant damage in some destinations, the region's resilience was evident as destinations swiftly resumed operations and welcomed visitors once again.

While the immediate effects of the hurricanes were mitigated, the long-term implications of climate change remain a concern for the region. Rising fuel costs, inflation, and potential economic downturns could dampen travel demand. Additionally, geopolitical conflicts in Europe and the Middle East may further drive up fuel prices, increasing travel costs and limiting sector growth.

Despite these challenges, the Caribbean remains a top destination for global travellers due to its iconic beauty, vibrant festivals, and accessibility. With more flights and accommodations expected, the region's tourism momentum is likely to continue, though concerns about overtourism must be addressed.

The overall outlook is positive, with lots of opportunities for expansion and innovation. Tourist visits to the region are expected to grow by 5.0% to 10.0%, potentially bringing between 33.8 million and 35.4 million tourists in 2024. Similarly, the cruise sector is anticipated to experience growth, with a projected increase of 5% to 10%, resulting in an estimated 32.1 million to 33.5 million cruise visits in 2024. This cruise performance was revised downward from the midyear growth estimate of 10.0% to 15.0%.

About the Caribbean Tourism Organization

The Caribbean Tourism Organization (CTO), with headquarters in Barbados, is the Caribbean's tourism development agency comprising membership of the region's finest countries and territories including Dutch, English, French and Spanish-speaking, as well as a myriad of private sector allied members. The CTO's vision is to position the Caribbean as the most desirable, year-round, warm weather destination, and its purpose is Leading Sustainable Tourism - One Sea, One Voice, One Caribbean.

Among the benefits to its members the organization provides specialized support and technical assistance in sustainable tourism development, marketing, communications, advocacy, human resource development, event planning & execution and research & information technology.

The CTO's Headquarters is located at Baobab Tower, Warrens, St. Michael, Barbados BB 22026; Tel: (246) 427-5242; Fax: (246) 429-3065; E-mail: CTObarbados@caribtourism.com;

For more information on the Caribbean Tourism Organization, please visit www.OneCaribbean.org and follow CTO on [Facebook](#), [Twitter](#), [Instagram](#) and [LinkedIn](#) to be part of the conversation.

Appendix

Table A1 - Tourist (Stop-Over) Arrivals and Cruise Passenger Visits In 2024

Destination	Tourists			Cruise Passengers		
	Period	Visits	% Change 2024/23	Period	Visits	% Change 2024/23
Anguilla	Jan-Jun	66,316	15.3	-	-	-
Antigua & Barbuda *	Jan-Sep	242,517	16.3	Jan-Sep	543,848	27.6
Aruba	Jan-Sep	1,080,449	16.2	Jan-Sep	651,342	13.2
Bahamas ^P	Jan-Apr	650,371	-2.8	Jan-Sep	6,912,738	20.4
Barbados	Jan-Sep	509,673	12.9	Jan-Sep	377,340	27.7
Belize	Jan-Sep	431,353	21.8	Jan-Sep	629,714	-6.2
Bermuda *	Jan-Sep	159,802	7.5	Jan-Sep	456,837	12.7
Bonaire	-	-	-	-	-	-
British Virgin Islands	Jan-Sep	233,175	15.4	Jan-Sep	541,405	7.4
Cayman Islands	Jan-Sep	330,514	2.3	Jan-Sep	792,880	-14.5
Cozumel (Mexico)	-	-	-	Jan-Sep	3,406,734	13.5
Cuba ***	Jan-Sep	1,719,145	-5.2	-	-	-
Curaçao	Jan-Sep	513,871	22.6	Jan-Sep	592,686	22.3
Dominica ^P	Jan-Sep	59,429	14.2	Jan-Sep	215,221	3.1
Dominican Republic *	Jan-Sep	6,430,407	6.8	Jan-Sep	1,909,197	18.8
Grenada	Jan-Sep	148,720	14.9	Jan-Sep	195,734	-1.6
Guadeloupe	-	-	-	-	-	-
Guyana	Jan-Sep	267,184	14.1	-	-	-
Haiti	-	-	-	-	-	-
Jamaica	Jan-Sep	2,204,919	0.3	Jan-Sep	928,419	6.3
Martinique	Jan- Jul	355,383	-2.7	Jan-Jul	187,644	-5.1
Montserrat	Jan-Jun	5,191	29.4	-	-	-
Puerto Rico **	Jan-Jun	1,038,409	3.2	Jan-Jun	850,881	5.6
Saint Lucia	Jan-Sep	329,262	16.4	Jan-Sep	481,028	10.7
St. Kitts & Nevis [^]	Jan-Feb	21,000	13.6	Jan-Feb	264,035	-12.2
St. Maarten *	Jan-Sep	305,552	5.7	Jan-Sep	913,589	-2.8
St. Vincent & the G'dines	Jan-Sep	71,100	22.7	Jan-Sep	155,882	-13.9
Suriname	-	-	-	-	-	-
Trinidad & Tobago ***	Jan-Sep	246,541	7.2	Jan-Apr	91,187	31.8
Turks & Caicos Islands *	Jan-Sep	571,837	14.2	Jan-Sep	916,846	29.7
US Virgin Islands	Jan-Sep	727,641	23.6	Jan-Sep	1,248,119	3.2

* Non-Resident Air Arrivals **Non-Resident Hotel registrations only *** Air Arrivals by Nationality

[^] Excludes data from Vance M. Amory Int'l Airport in Nevis ^P Preliminary figures ⁿ New Series

n.a. Figures not available - No Cruise Figures are Reported.

N.B: Figures are subject to revision by reporting countries.

SOURCE - Data supplied by member countries and available as at December 23, 2024

Table A2 - Tourist Arrivals by Main Market – 2024

Destination	Period	United States		Canada		Europe		Other		Total	
		Tourists	% ch.	Tourists	% ch.	Tourists	% ch.	Tourists	% ch.	Tourists	% ch.
Anguilla	Jan-Jun	48,938	19.7	3,000	12.9	6,364	-5.1	8,014	10.6	66,316	15.3
Antigua & Barbuda *	Jan-Sep	129,887	26.2	22,691	11.8	58,113	0.9	31,826	15.0	242,517	16.3
Aruba	Jan-Sep	818,847	14.6	48,490	16.7	51,050	-7.7	162,062	36.7	1,080,449	16.2
Bahamas ^P	Jan-Apr	535,344	-8.9	53,541	65.0	37,912	27.5	23,574	22.7	650,371	-2.8
Barbados	Jan-Sep	170,595	32.5	63,228	16.5	184,078	-2.0	91,772	13.9	509,673	12.9
Belize	Jan-Sep	301,188	25.0	25,150	33.9	40,357	1.8	64,658	18.4	431,353	21.8
Bermuda *	Jan-Sep	122,054	12.5	11,634	-14.6	18,087	-3.2	8,027	2.7	159,802	7.5
Cayman Islands	Jan-Sep	275,623	2.0	21,066	2.6	14,868	5.7	18,957	3.9	330,514	2.3
Cuba ***	Jan-Sep	110,538	-12.7	695,567	-2.0	331,911	-8.5	581,129	-5.6	1,719,145	-5.2
Curaçao	Jan-Sep	131,987	26.0	24,287	13.3	216,707	21.7	140,890	22.8	513,871	22.6
Dominica ^P	Jan-Sep	12,463	25.2	1,566	12.3	11,546	18.4	33,854	9.4	59,429	14.2
Dominican Republic *	Jan-Sep	2,208,267	10.3	716,736	11.0	815,751	-2.4	2,689,653	5.9	6,430,407	6.8
Grenada	Jan-Sep	81,027	15.2	14,296	19.4	26,678	10.4	26,719	16.5	148,720	14.9
Guyana	Jan-Sep	123,582	12.2	21,361	5.2	16,223	5.2	106,018	20.0	267,184	14.1
Haiti	-	-	-	-	-	-	-	-	-	-	-
Jamaica ^P	Jan-Sep	1,601,582	-2.7	291,624	7.3	218,427	10.7	93,286	13.7	2,204,919	0.3
Montserrat	Jan-Jun	1,495	26.2	244	-25.2	2,040	33.4	1,412	45.4	5,191	29.4
Puerto Rico **	-	-	-	-	-	-	-	-	-	-	-
Saint Lucia	Jan-Sep	189,220	21.6	26,514	4.5	67,608	4.6	45,920	23.0	329,262	16.4
St. Kitts & Nevis ^	Jan-Feb	14,236	14.9	1,514	-7.1	1,994	-7.6	3,256	41.6	21,000	13.6
St. Maarten *	Jan-Sep	182,034	10.1	28,498	2.2	66,802	-4.3	28,218	8.4	305,552	5.7
St. Vincent & the G'dines	Jan-Sep	28,733	25.5	8,812	27.1	14,868	17.6	18,687	20.6	71,100	22.7
Suriname	-	-	-	-	-	-	-	-	-	-	-
Trinidad & Tobago ***	Jan-Sep	122,331	9.7	26,435	0.4	35,554	6.7	62,221	5.9	246,541	7.2
Turks & Caicos Islands *	Jan-Sep	466,219	15.0	34,844	4.3	11,267	52.4	59,507	8.8	571,837	14.2
US Virgin Islands **	-	-	-	-	-	-	-	-	-	-	-

* Non-Resident Air Arrivals **Non-Resident Hotel registrations only *** Air Arrivals by Nationality - missing data

^ Excludes data from Vance M. Amory Int'l Airport in Nevis ^P Preliminary figures

N.B U.S.V.I reported figures in this table are Hotel Registrations whereas they reported Stay Over totals are Air Arrivals.

N.B: Figures are subject to revision by reporting countries.

Data supplied by member countries and available as at December 23, 2024

Table A3 - Tourist Arrivals into The Caribbean from Major European Markets – 2024

Country	PERIOD	EUROPE		UNITED KINGDOM		FRANCE		GERMANY		ITALY		THE NETHERLANDS		SWEDEN		SPAIN		OTHER	
		2024	% CH	2024	% CH	2024	% CH	2024	% CH	2024	% CH	2024	% CH	2024	% CH	2024	% CH	2024	% CH
Anguilla	Jan-Jun	6,364	-5.1	2,088	-13.4	.	.	425	32.0	625	-2.5	.	.	.	.	.	.	3,226	-3.3
Antigua & Barbuda*	Jun-Sep	58,113	0.9	48,787	-1.0	1,036	9.6	888	18.1	2,096	16.7	426	20.0	286	11.3	693	27.2	3,901	6.7
Aruba	Jun-Sep	51,050	-7.7	5,887	11.8	.	.	3,233	-21.4	5,040	-3.7	26,026	-9.3	600	-65.5	.	.	10,264	0.1
Barbados	Jun-Sep	184,078	-2.0	164,989	-1.8	1,997	6.7	3,351	-25.0	1,598	69.8	1,316	7.3	784	-4.3	922	27.9	9,121	-6.5
Belize	Jun-Sep	40,357	1.8	10,943	4.4	4,482	9.0	5,942	-4.4	2,206	20.8	5,125	-4.3	401	0.0	1,704	11.1	9,554	-1.6
Bermuda *	Jun-Sep	18,087	-3.2	13,706	-6.1	.	.	.	.	.	.	.	.	.	.	.	.	4,381	6.5
Cayman Islands	Jun-Sep	14,868	5.7	9,533	3.1	498	9.9	683	25.1	635	13.0	336	12.4	143	10.9	361	7.8	2,679	7.9
Cuba ***	Jun-Sep	331,911	-8.5	20,237	-46.5	38,562	-15.5	47,324	-4.7	23,916	-40.3	.	.	.	.	50,498	-27.2	151,374	26.1
Curaçao	Jun-Sep	216,707	21.7	3,084	22.5	1,863	43.4	10,037	18.0	2,078	132.2	182,867	21.3	703	32.9	1,634	96.9	14,441	13.2
Dominica ^P	Jun-Sep	11,546	18.4	3,106	11.0	5,677	36.4	915	10.5	162	21.8	186	31.0	149	-2.0	155	-1.9	1,196	-13.1
Dom Republic *	Jun-Sep	815,751	-2.4	139,085	6.4	120,790	-2.4	93,370	-1.6	73,459	9.2	19,325	2.9	2,470	-15.1	97,437	-27.2	269,815	2.2
Grenada	Jun-Sep	26,678	10.4	21,585	10.2	513	3.8	1,794	-2.6	332	21.6	.	.	226	11.9	.	.	2,228	25.1
Guyana	Jun-Sep	16,223	5.2	8,777	2.5	682	15.2	381	5.8	481	26.2	1,696	21.9	76	-9.5	333	8.8	3,797	1.5
Haiti	-	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
Jamaica	Jan-Jun	147,214	13.1	115,806	14.3	3,132	13.0	9,291	17.8	4,278	17.1	2,704	-34.8	744	13.1	1,471	13.4	9,788	17.4
Montserrat	Jan-Jun	2,040	33.4	1,868	38.0	.	.	.	.	.	.	.	.	.	.	.	.	172	-1.7
Puerto Rico **	-	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
Saint Lucia	Jun-Sep	67,608	4.6	57,707	3.2	3,295	-4.0	1,351	37.4	396	48.3	560	40.4	4	-98.7	.	.	4,295	29.2
St Kitts And Nevis [^]	Jan-Feb	1,994	-7.6	1,362	2.2	97	-29.2	89	-34.6	26	-31.6	61	-12.9	17	-45.2	23	-8.0	319	-17.8
St Maarten *	Jun-Sep	66,802	-4.3	.	.	35,581	2.8	450	4.4	.	.	18,688	-14.3	64	0.0	.	.	12,019	-6.5
St Vincent & G'dines	Jun-Sep	14,868	17.6	11,725	20.5	507	9.0	487	20.5	320	5.6	216	11.9	191	-29.3	125	-1.6	1,297	12.5
Suriname	-	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
Trinidad & Tobago	Jun-Sep	35,554	6.7	21,834	4.7	1,870	14.7	2,185	-4.3	626	-12.6	2,837	28.6	491	10.1	806	24.0	4,905	8.1
Turks & Caicos Is. *	Jun-Sep	11,267	52.4	11,267	52.4	.	.	.	.	.	.	.	.	.	.	.	.	.	.

* Non-Resident Air Arrivals **Non-Resident Hotel registrations only ^ Excludes data from Vance M. Amory Int'l Airport in Nevis ^P Preliminary figures - missing data.
 N.B: Figures are subject to revision by reporting countries. SOURCE - Data supplied by member countries and available as at December 23, 2024

Table A4: Tourist Arrivals into The Caribbean from Other Markets – 2024

Destination	Period	OTHER		CARIBBEAN		SOUTH AMERICA		REST of the WORLD	
		Tourists	%ch	Tourists	%ch	Tourists	%ch	Tourists	%ch
Anguilla	Jan-Jun	8,014	10.6	5,545	17.1	.	.	2,469	-1.6
Antigua & Barbuda *	Jan-Sep	31,826	15.0	24,096	5.0	850	33.9	6,880	68.5
Aruba	Jan-Sep	162,062	36.7	.	.	135,533	47.0	26,529	0.9
Bahamas ^P	Jan-Apr	23,574	22.7	6,427	10.0	.	.	17,147	28.3
Barbados	Jan-Sep	91,772	13.9	72,919	7.0	7,211	49.0	11,642	53.5
Belize	Jan-Sep	64,658	18.4	2,925	-15.7	4,390	7.2	57,343	21.9
Bermuda *	Jan-Sep	8,027	2.7	2,248	17.7	.	.	5,779	-2.1
Cayman Islands	Jan-Sep	18,957	3.9	11,076	0.3	1,531	2.8	6,350	11.2
Cuba ***	Jan-Sep	581,129	-5.6	.	.	.	.	.	.
Curaçao	Jan-Sep	140,890	22.8	33,165	-12.3	98,720	47.2	9,005	-8.4
Dominican Republic *	Jan-Sep	2,689,653	5.9	371,857	-5.6	913,974	10.0	1,403,822	6.8
Dominica ^P	Jan-Sep	33,854	6.9	20,263	5.1	390	43.9	13,201	9.0
Grenada	Jan-Sep	26,719	16.5	22,803	15.6	1,100	65.7	2,816	10.7
Guyana	Jan-Sep	106,018	20.0	74,102	19.1	14,754	17.2	17,162	26.7
Haiti	-	.	.	.	.	.	.	.	.
Jamaica ^P	Jan-Jun	62,942	22.5	39,763	28.8	11,598	7.7	11,581	18.7
Montserrat	Jan-Jul	1,412	45.4	1,329	42.6	.	.	83	112.8
Puerto Rico **	-	.	.	.	.	.	.	.	.
Saint Lucia	Jan-Sep	45,920	23.0	40,938	21.2	.	.	4,982	40.8
St Kitts & Nevis ^	Jan-Feb	3,256	41.6	2,643	42.9	94	20.5	519	39.9
St Maarten *	Jan-Sep	28,218	8.4	10,208	5.4	6,169	47.2	11,841	-2.5
St Vincent & Grenadines	Jan-Sep	18,687	20.6	15,728	15.8	1,226	42.7	1,733	65.7
Suriname	-	.	.	.	.	.	.	.	.
Trinidad & Tobago ***	Jan-Sep	62,221	5.9	43,497	10.4	4,223	9.1	14,501	-6.2
Turks & Caicos Islands *	Jan-Sep	59,507	8.8	51,583	15.2	.	.	7,924	-19.8

* Non-Resident Air Arrivals **Non-Resident Hotel registrations only *** Air Arrivals by Nationality ^ Excludes data from Vance M. Amory Int'l Airport in Nevis ^P Preliminary figures - missing data
N.B: Figures are subject to revision by reporting countries

SOURCE - Data supplied by member countries and available as at December 23, 2024

Glossary of Tourism Indicators

Tourists - visitors staying at least one night in the country visited, but less than a year.

Same-day - visitors who do not overnight in the country visited.

Cruise Passengers are regarded as a special type of same-day visitor (even if the ship overnights at the port).

Yacht Visitors are included among the tourist (stay-over) or same-day populations based on their length of stay.

Length of Stay - Obtained by dividing the number of overnight stays by the number of arrivals. This is usually calculated by country of residence of the guest and the type of accommodation.

Occupancy Rate - Provides information on differences in the use among various types of accommodation and the seasonal patterns in occupancy. Occupancy can be divided into the following categories:

Bed Occupancy - The gross occupancy rate of bed places is calculated by dividing the hotel overnight stays by the product of bed places on offer and the number of days in the corresponding month for the same group of establishments, then multiplying the quotient by 100 to express as a percentage.

Room Occupancy Rate - For Hotels and similar establishments the net rate of room occupancy is a measure of capacity utilization. It is calculated by dividing the monthly or yearly sum of occupied rooms by the number of rooms available for use, then multiplying the quotient by 100 to express as a percentage.

Tourism Expenditure - the total consumption expenditure made by a visitor for and during his or her trip and stay at a destination. This can be broken down into the following categories:

International and domestic tourism expenditure

Expenditure on Same-day visits

The products to which the expenditure relates to (e.g. accommodation, meals and drinks, shopping, entertainment etc...)

Average Daily Rate (ADR) - Room revenue divided by rooms sold, displayed as the average rental rate for a single room.

% Change - Amount of growth - up, flat, or down - this period versus same period last year (month or year-to-date). Calculated as $((TY - LY) / LY) * 100$.

Revenue (Room Revenue) - Total room revenue generated from the sale or rental of rooms.

RevPAR (Revenue Per Available Room) - Room revenue divided by rooms available.

Revenue passenger kilometres (RPK) - a measure of the volume of passengers carried by an airline. A revenue passenger-kilometre is flown when a revenue passenger is carried one kilometre.

Regional Groupings

Caribbean

OECS Countries - Anguilla, Antigua & Barbuda, British Virgin Is., Dominica, Grenada, Montserrat, Saint Lucia, St Kitts & Nevis, St Vincent & Grenadines

Other Commonwealth Countries - Bahamas, Barbados, Belize, Bermuda, Cayman Islands, Guyana, Jamaica, Trinidad & Tobago, Turks & Caicos Islands

Commonwealth Countries - OECS + Other Commonwealth

Dutch Caribbean - Aruba, Bonaire, Curaçao, Saba, St Eustatius, St Maarten

French Caribbean - Guadeloupe, Martinique

US Territories - Puerto Rico, US Virgin Islands

Other Caribbean - Cancun, Cozumel, Cuba, Dom Republic, Haiti, Suriname

CARICOM - Antigua & Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Lucia, St Kitts & Nevis, St Vincent & Grenadines, Suriname, Trinidad & Tobago

Northern Caribbean - Bahamas, Bermuda, Turks & Caicos Islands

Eastern Caribbean - Antigua & Barbuda, British Virgin Islands, Dominica, Dominican Republic, Guadeloupe, Haiti, Puerto Rico, St. Kitts & Nevis, St. Maarten, US Virgin Islands

Southern Caribbean - Aruba, Barbados, Bonaire, Curaçao, Grenada, Martinique, Saint Lucia, St. Vincent & the Grenadines, Trinidad & Tobago

Western Caribbean - Belize, Cayman Islands, Cozumel, Jamaica

South America - Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay, Venezuela