

Caribbean Tourism Pulse

Presented by:



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



2021 Caribbean Travel Marketplace Sponsors

FIGMENT DESIGN
Powered by Imagination

interval
INTERNATIONAL


marketplace
EXCELLENCE



TRAVELZOO



MAAGICAL
ST. MAARTEN


St. Martin
THE FRIENDLY ISLAND FRENCH CARIBBEAN

AEROMD

amRESORTS

NAVIS

CONDÉ NAST

GAMEMASTERS
Escape SOLUTIONS

QUESTEX
TRAVEL
GROUP



**TRAVEL+
LEISURE**



TRIPTease

FOOD&WINE

Today's Agenda

Tourism Pulse Topics & Speakers:

9:00 - 10:30AM ET

- **Global and Caribbean Performance and Outlook** – Adam Sacks, President, Tourism Economics
- **Hotel Performance and Outlook** – Carter Wilson, Senior Vice President, STR
- **Airlift and Airlines Performance and Forecast** – Olivier Ponti, Vice President, Forward Keys

Market Updates from Source Markets:

- 10:30 – 10:55AM ET: UK-Ireland
- 11:00 – 11:25AM ET: USA
- 11:30AM – 12:00PM ET: Italy/Spain/France



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Caribbean Tourism Pulse

Presented by:



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



PLANNING FOR THE RECOVERY

Adam Sacks

President

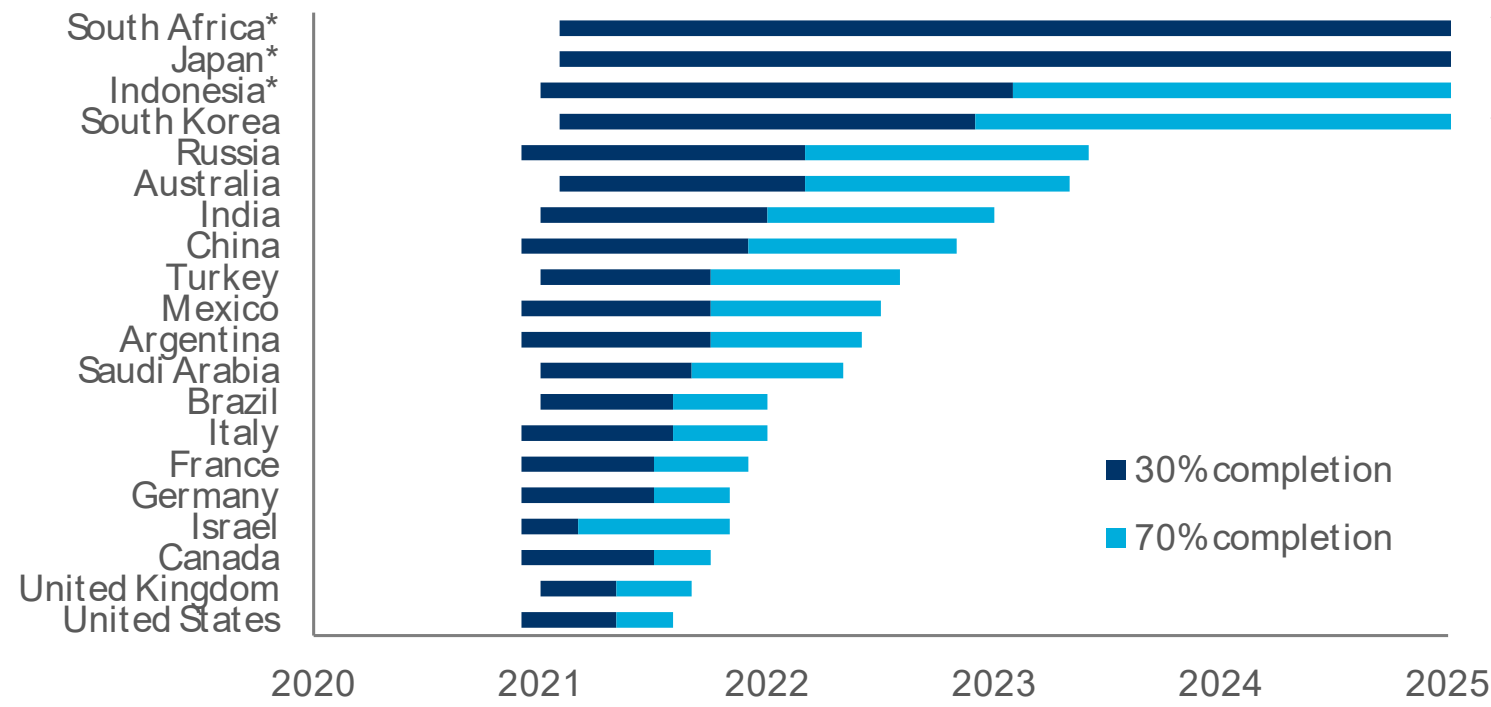
Tourism Economics

adam@tourismeconomics.com

Pace of vaccine rollout varies across countries

Vaccine completion timeframe at current rates, G20 countries & Israel

Time period to vaccinate 30% and 70% of population



70% population will not be covered until later than 2025 **at current rates**

Note: This rate will likely change for many countries and the chart does not represent a forecast of when we believe vaccination will be completed, but is an indication of current progress.

(Based on CURRENT RATES, those countries marked with an * will not achieve herd immunity by 2025)

Source: Tourism Economics, OWID

Chart updated: 19/04/2021

The number I watch every day

81.8%

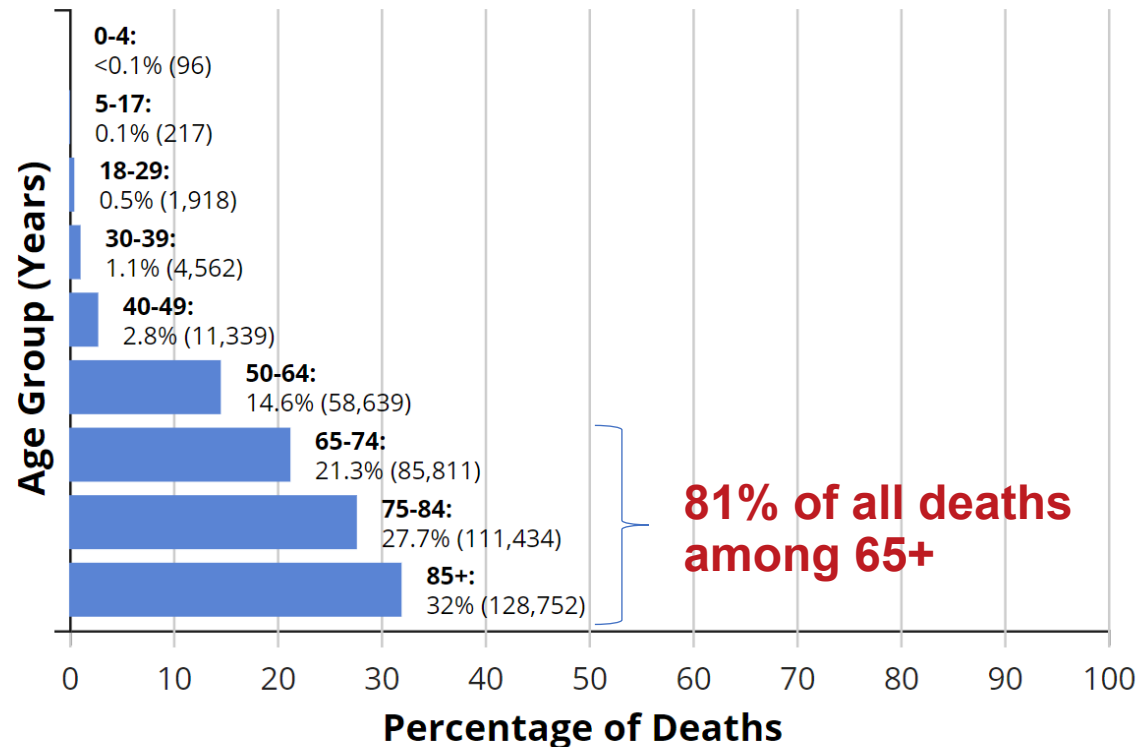
The numbers I watch every day

People Vaccinated	At Least One Dose	Fully Vaccinated
Total	141,751,857	96,747,454
% of Total Population	42.7%	29.1%
Population ≥ 18 Years of Age	139,902,174	96,247,756
% of Population ≥ 18 Years of Age	54.2%	37.3%
Population ≥ 65 Years of Age	44,754,293	37,149,968
% of Population ≥ 65 Years of Age	81.8%	67.9%

Source: CDC (April 27, 2021)

Why I care about that one number...

U.S. Covid-19 Deaths by Age

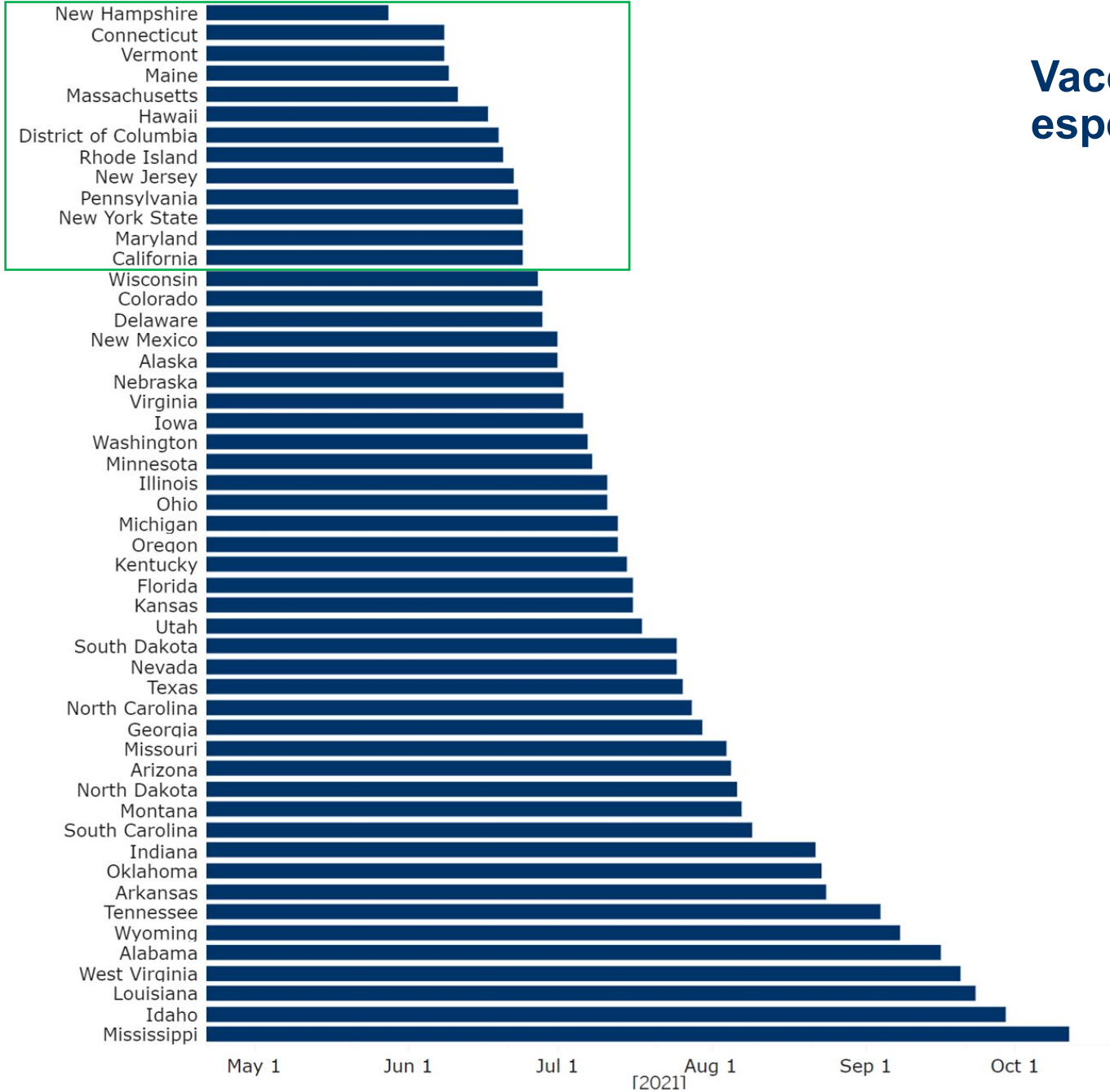


50% of all adults have received the vaccine

81% of age 65+ have received the vaccine

This age distribution implies a 74% reduction in Covid-19 deaths

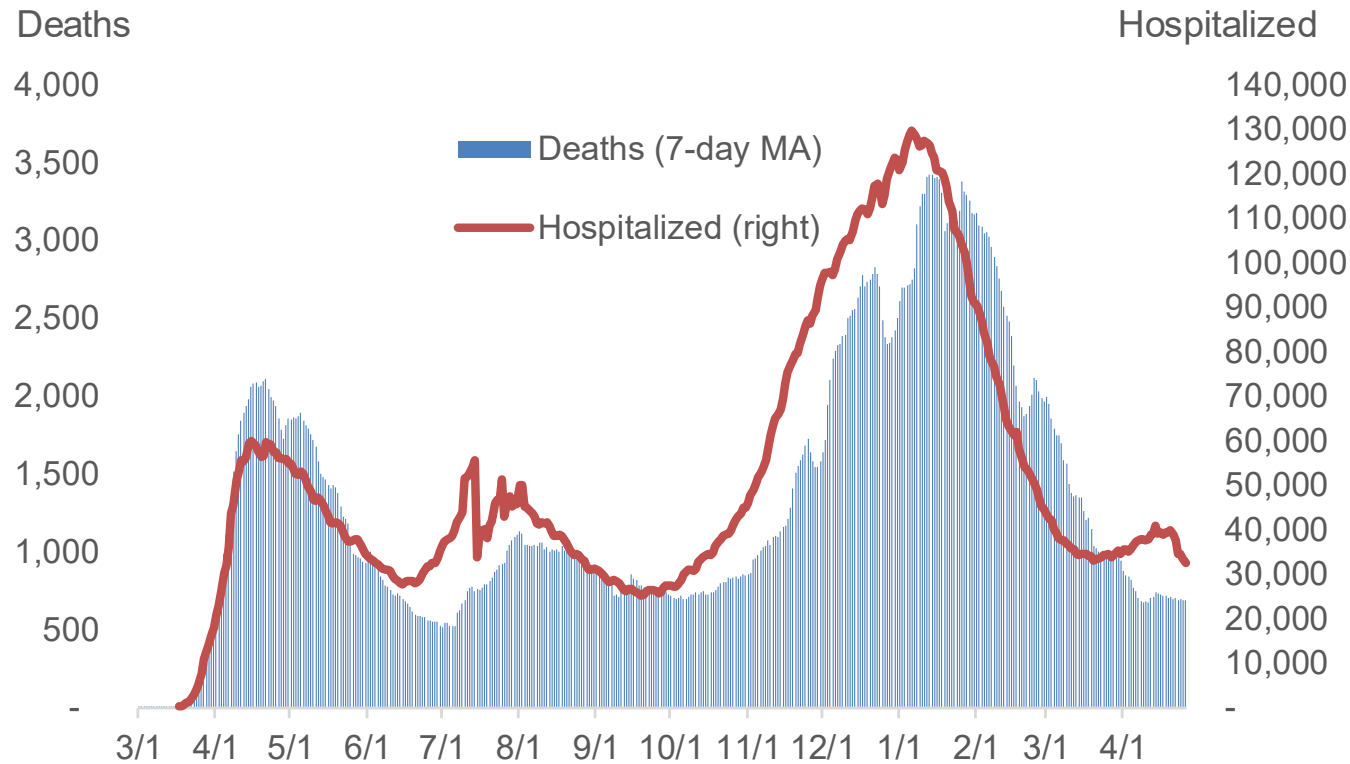
Vaccination completion timeframe at current rate
Time Period to vaccinate 70% of Population, as of April 19,2021



Vaccination rates are encouraging -- especially for Northeast

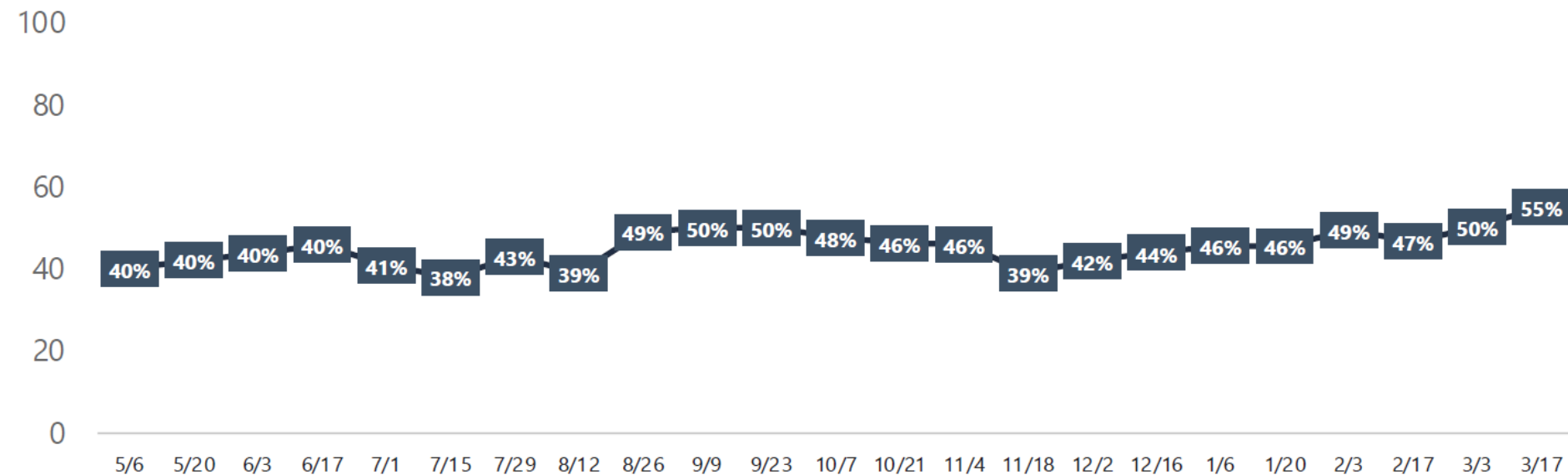
...which means this trend should continue

US COVID Deaths and Hospitalizations



Travel confidence is steadily rising

I Feel Safe Traveling Outside My Community Comparison of Travelers Who Strongly Agree or Agree



Travel Sentiment Study Wave 33

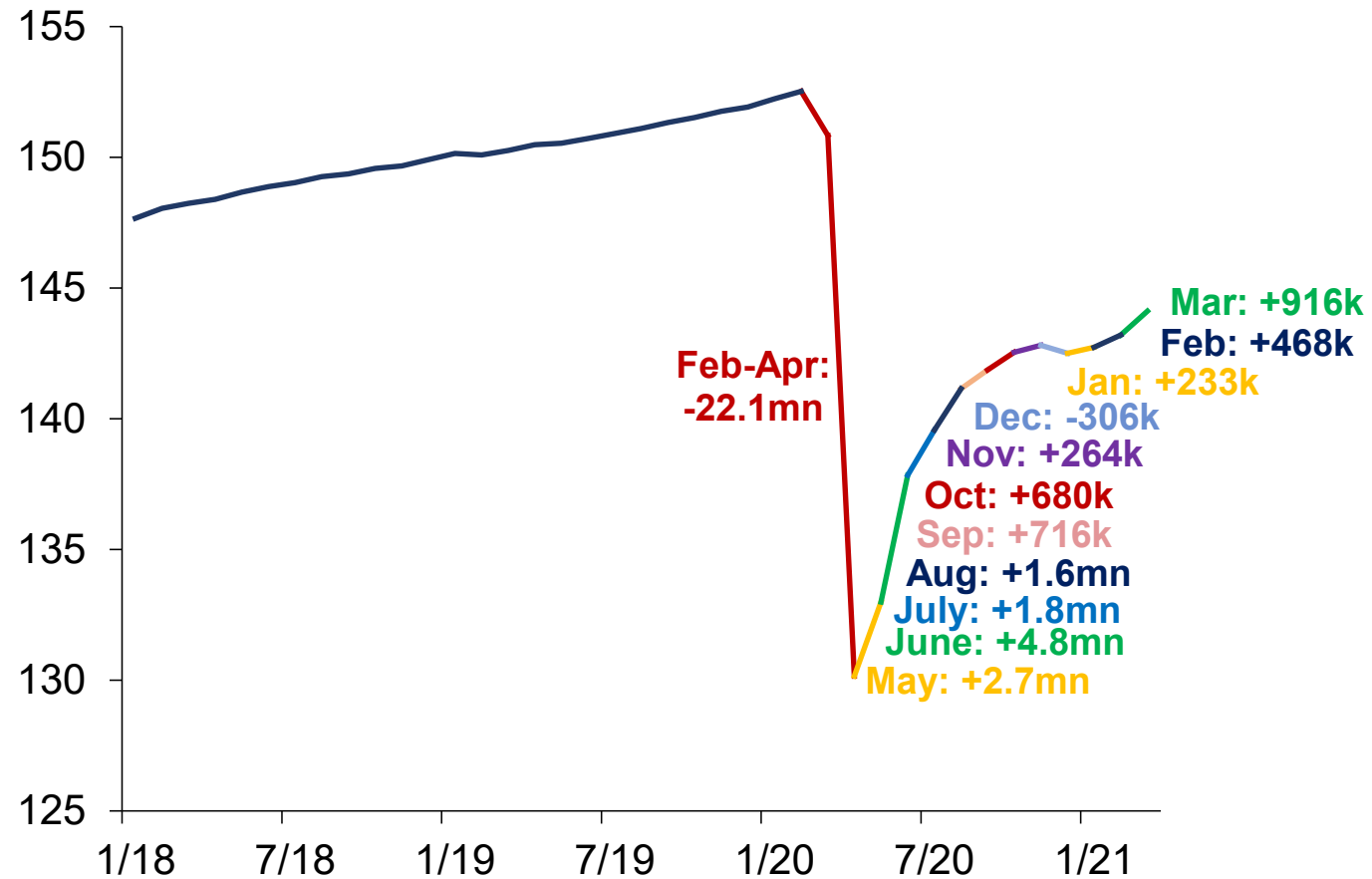
Longwoods INTERNATIONAL | miles PARTNERSHIP

How will the economy influence the travel recovery?

Encouraging job growth (but a ways to go)

US: Nonfarm payroll employment

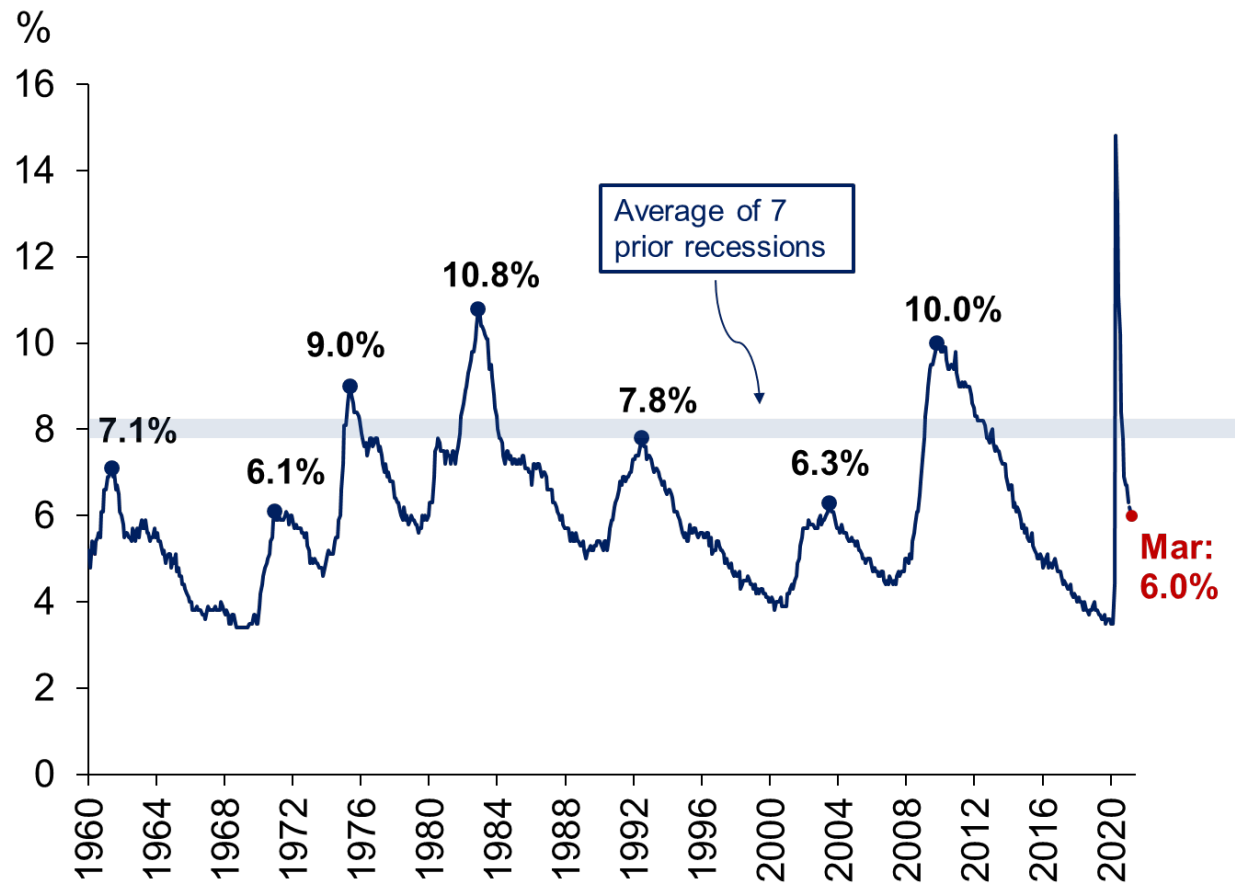
Millions



Source: Oxford Economics/Haver Analytics

Unemployment rate still near recession peaks

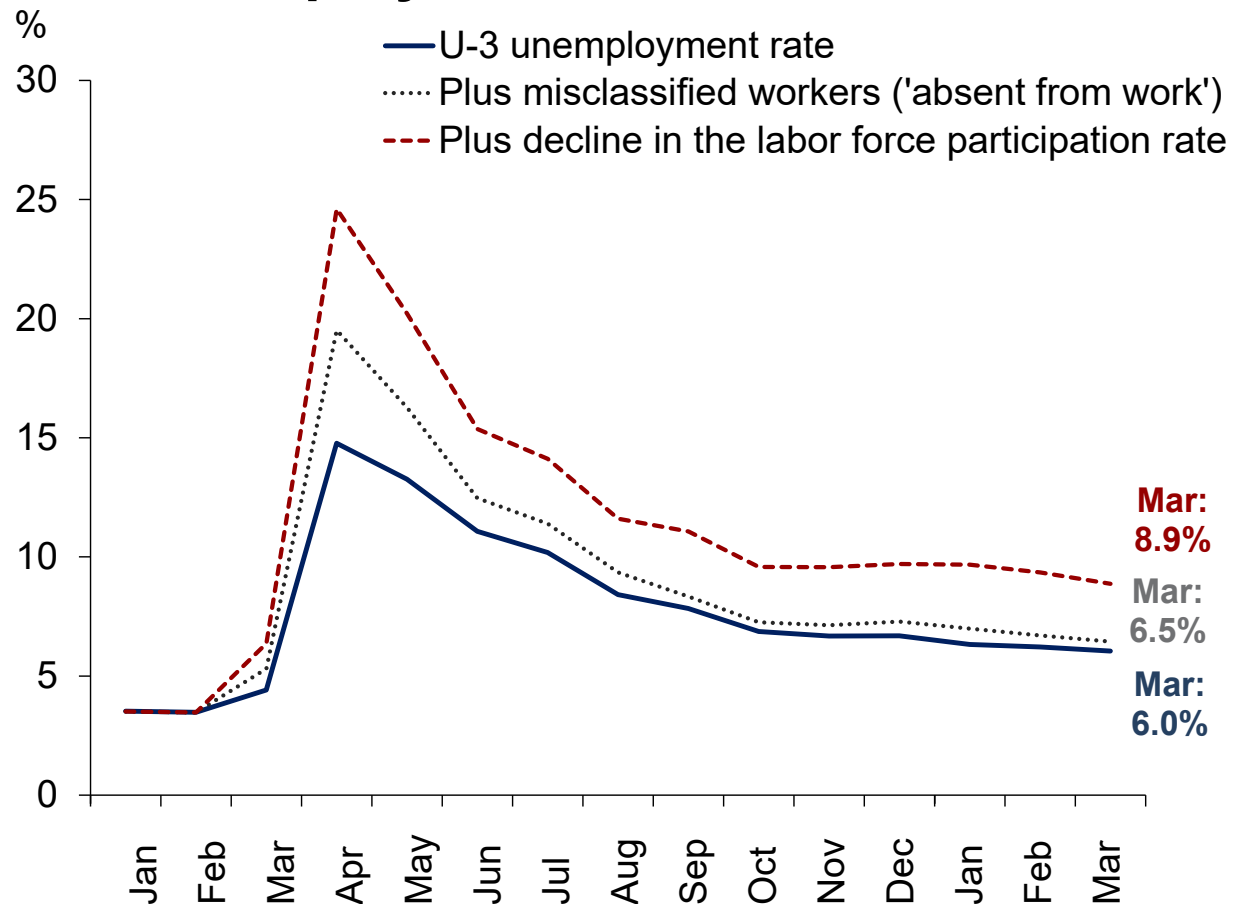
US: U3 unemployment rate



Source: Oxford Economics/Haver Analytics

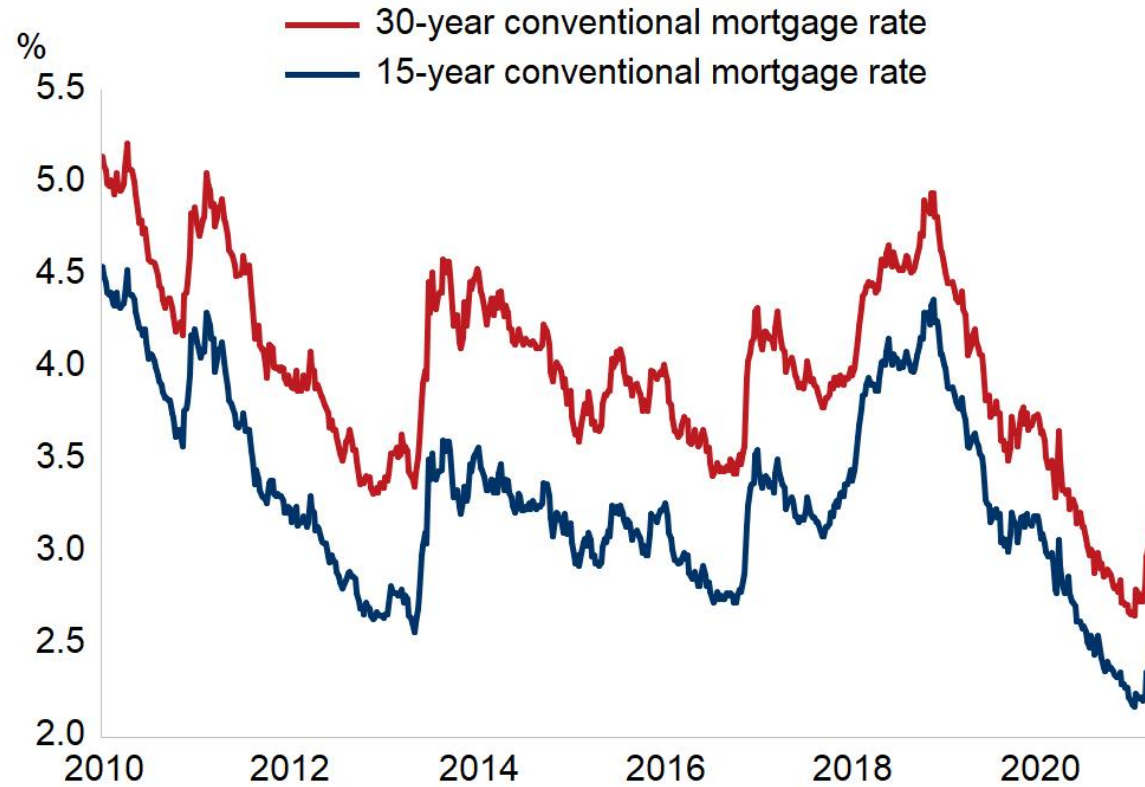
The “real” unemployment rate is closer to 9.0%

US: Unemployment rates



Fed policy acting as wind in the sails

US: Weekly mortgage rates

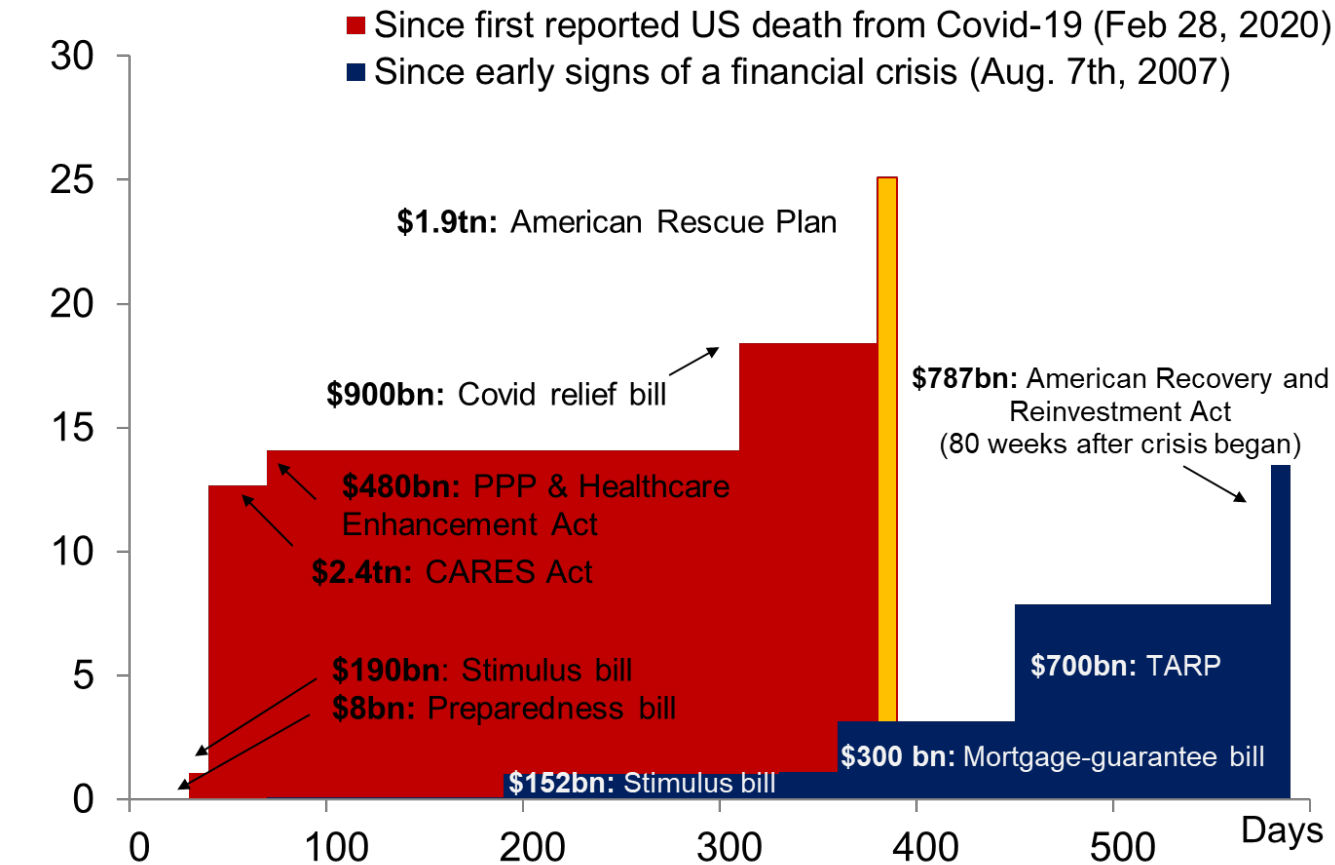


Source: Oxford Economics/Haver Analytics

Large and rapid fiscal stimulus without precedent

US: Funds authorized by Congress

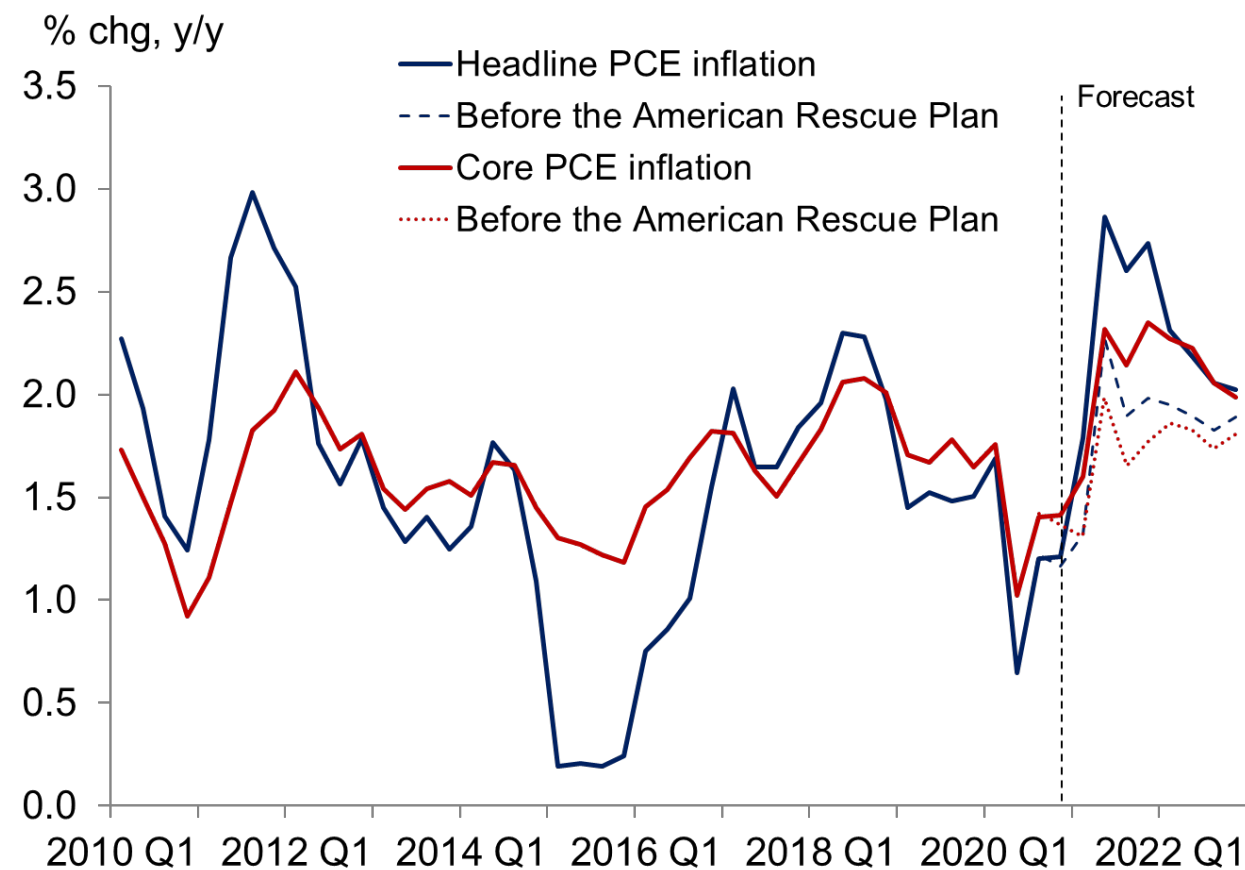
Share of GDP, %



Source : Oxford Economics/CBO

Warmer inflation may feel hot, but no overheating

US: Consumer price inflation

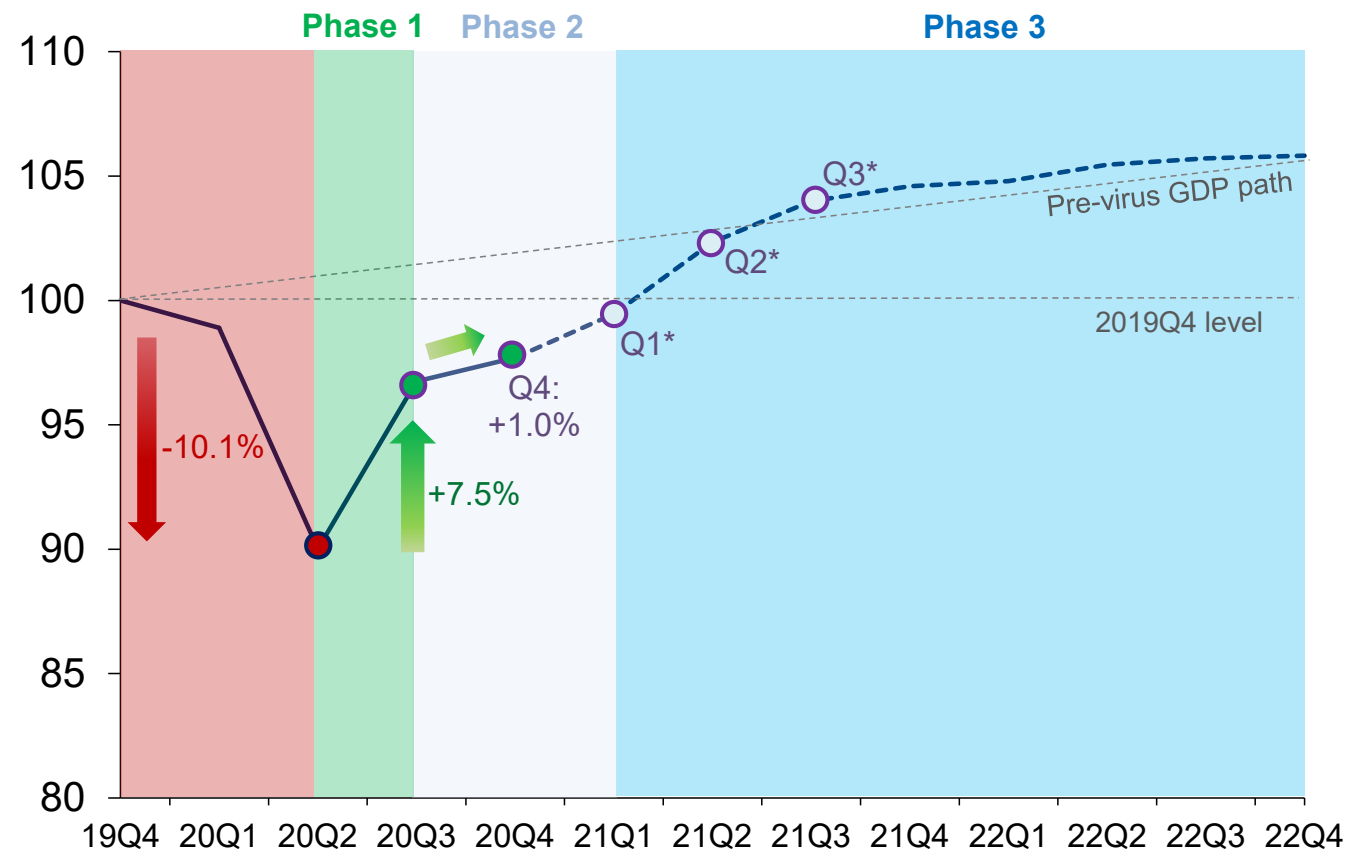


Source : Oxford Economics/Haver Analytics

Better health & fiscal stimulus = summer mini-boom

Delicate vaccine rollout followed by mini-boom

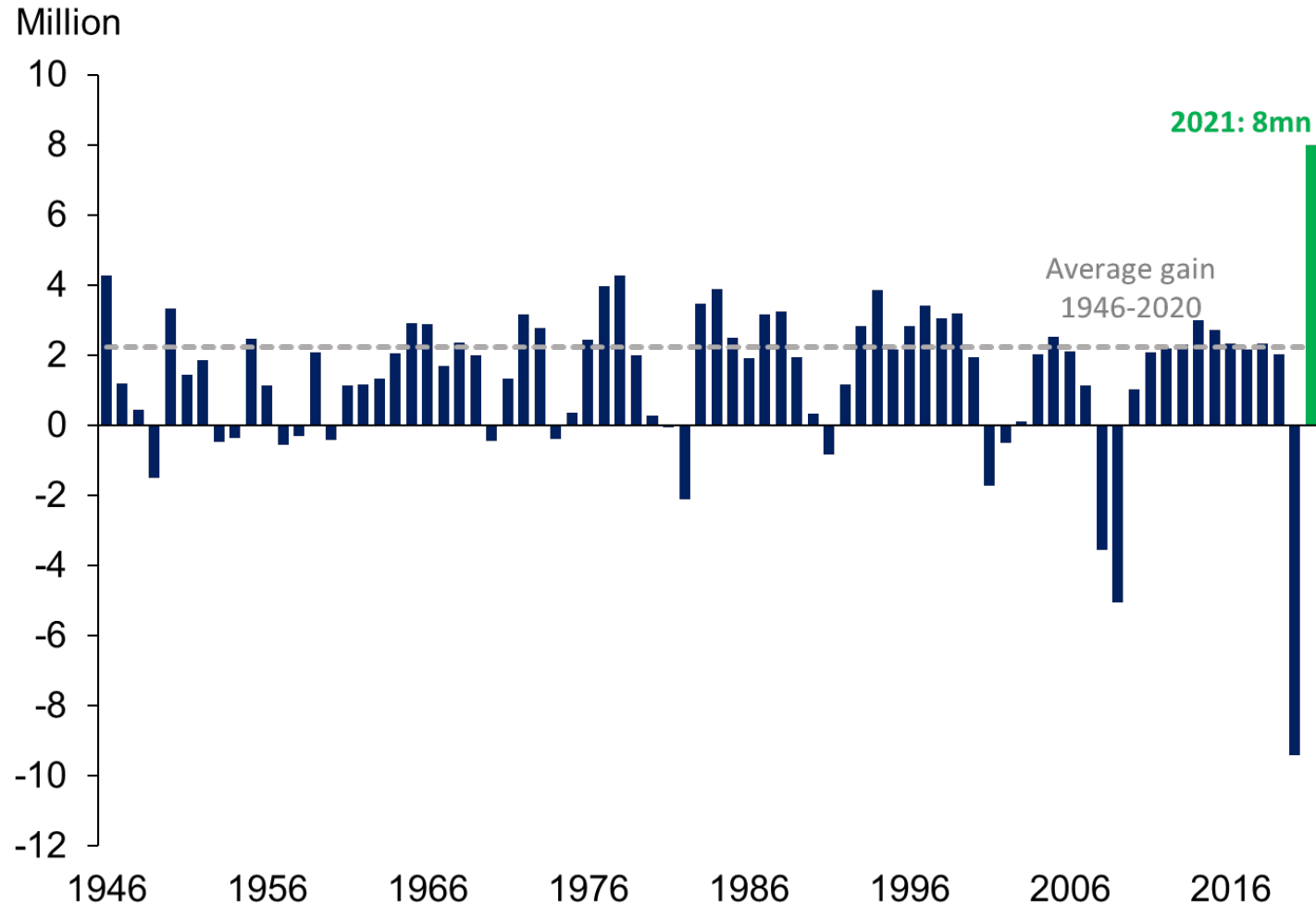
GDP Q4 2019 = 100



Source: Oxford Economics

Expecting 8 million jobs in 2021

US: Strongest job creation in history in 2021

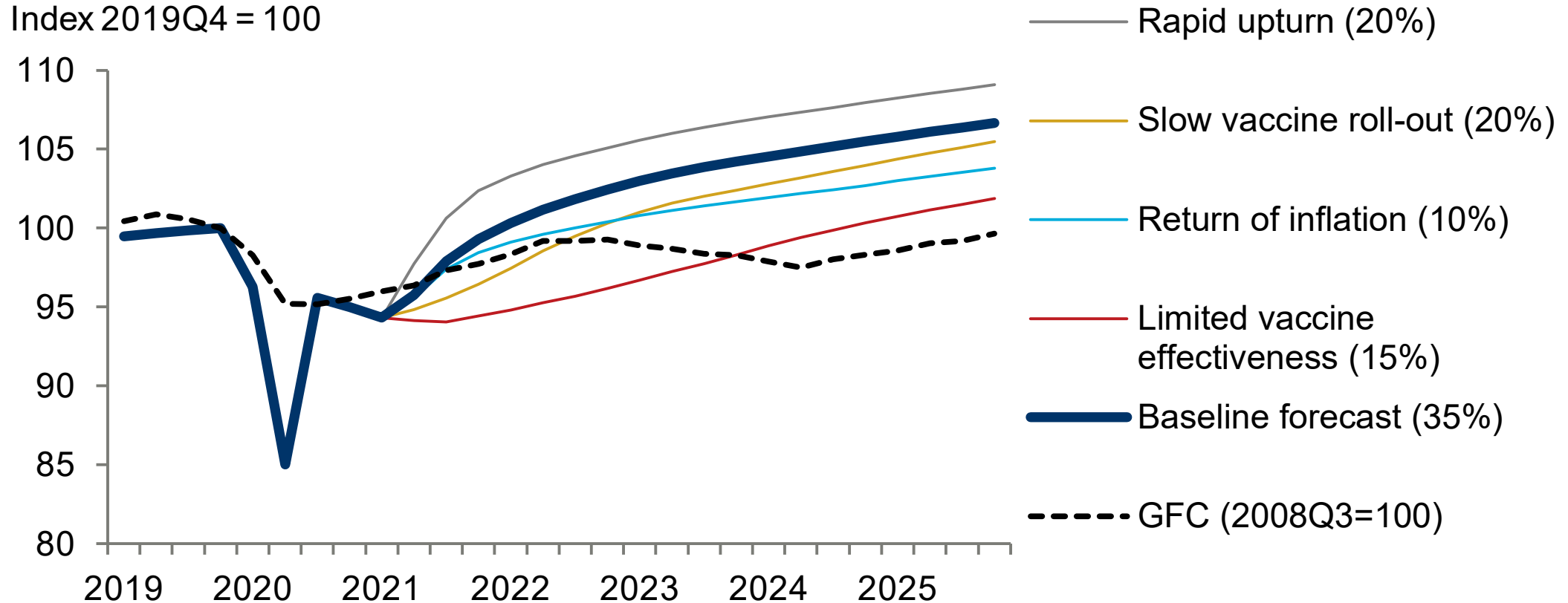


Source : Oxford Economics/Haver Analytics

Medium term outlook for Eurozone better than euro-crisis!

Eurozone GDP: distribution of potential scenarios

Index 2019Q4 = 100



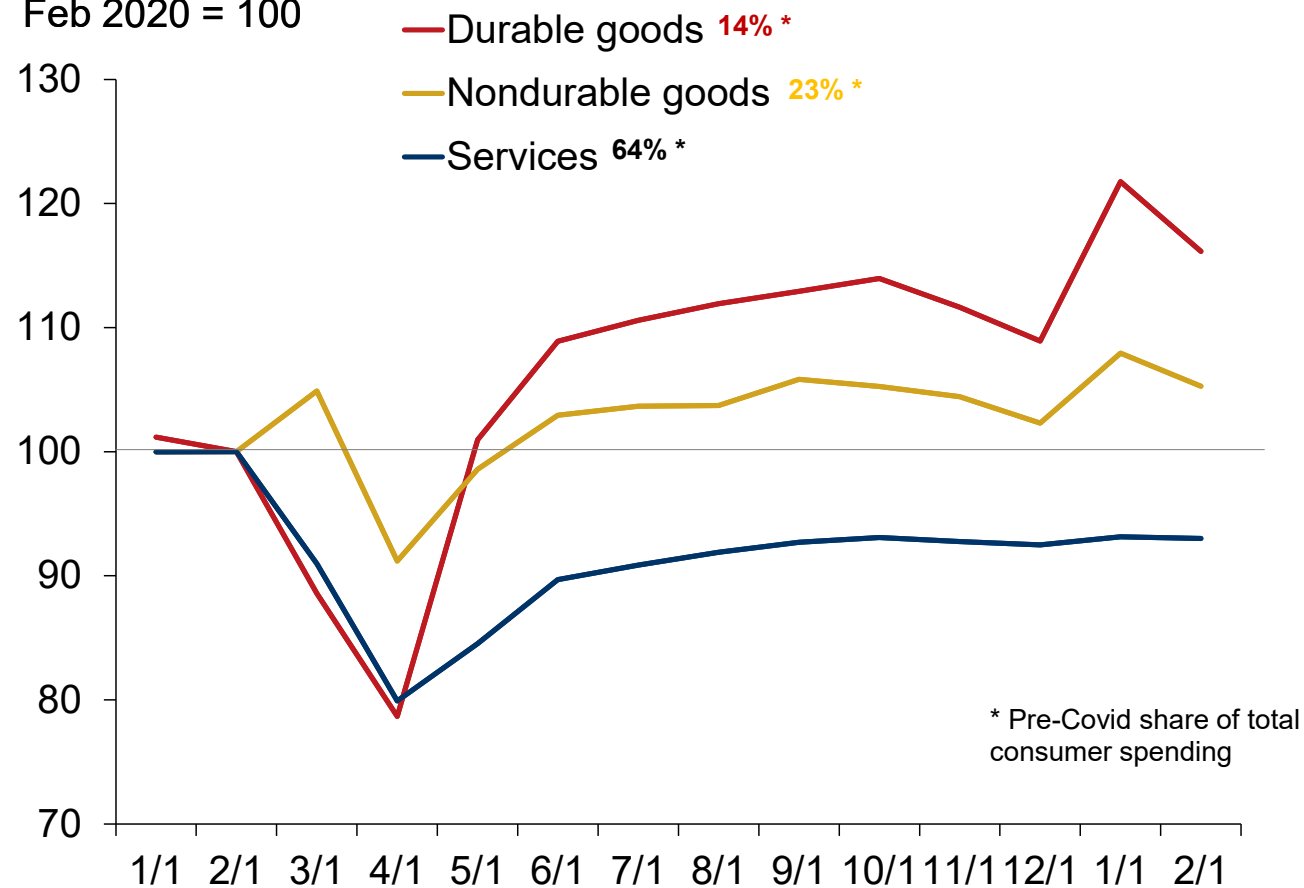
Source: Oxford Economics

When will travel recover?

Spending on goods continues to outpace services

US: The K-shaped consumer spending recovery

Feb 2020 = 100

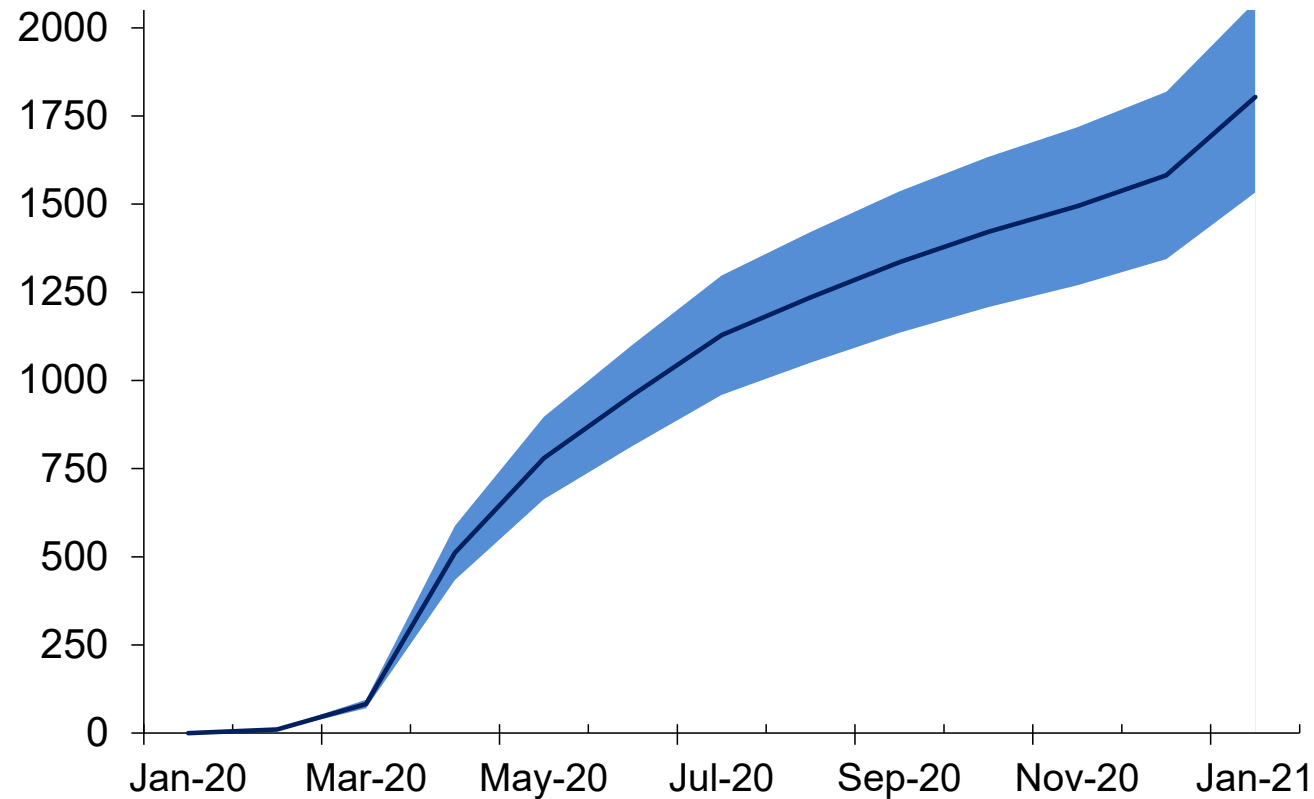


Source : Oxford Economics/Haver Analytics

A massive \$1.7 tn cash stash for households

US: Cumulative household savings

\$, billion, since January 2020

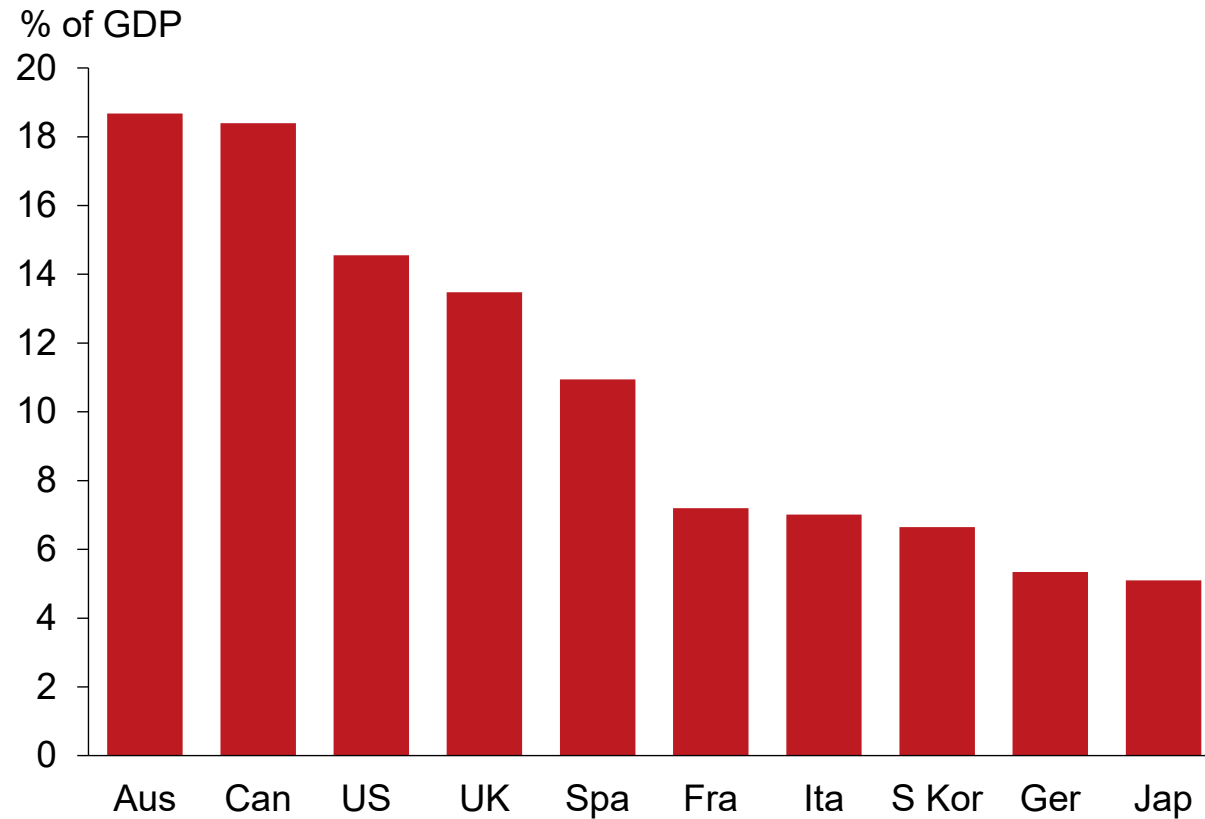


Source: Oxford Economics

- **Unemployment rate:**
 - Bachelor's or higher: 3.8%
 - High school grad: 7.2%
- **Households earning \$100k+ account for 24% of households... but 59% of leisure spending on lodging**

And it's not just the US

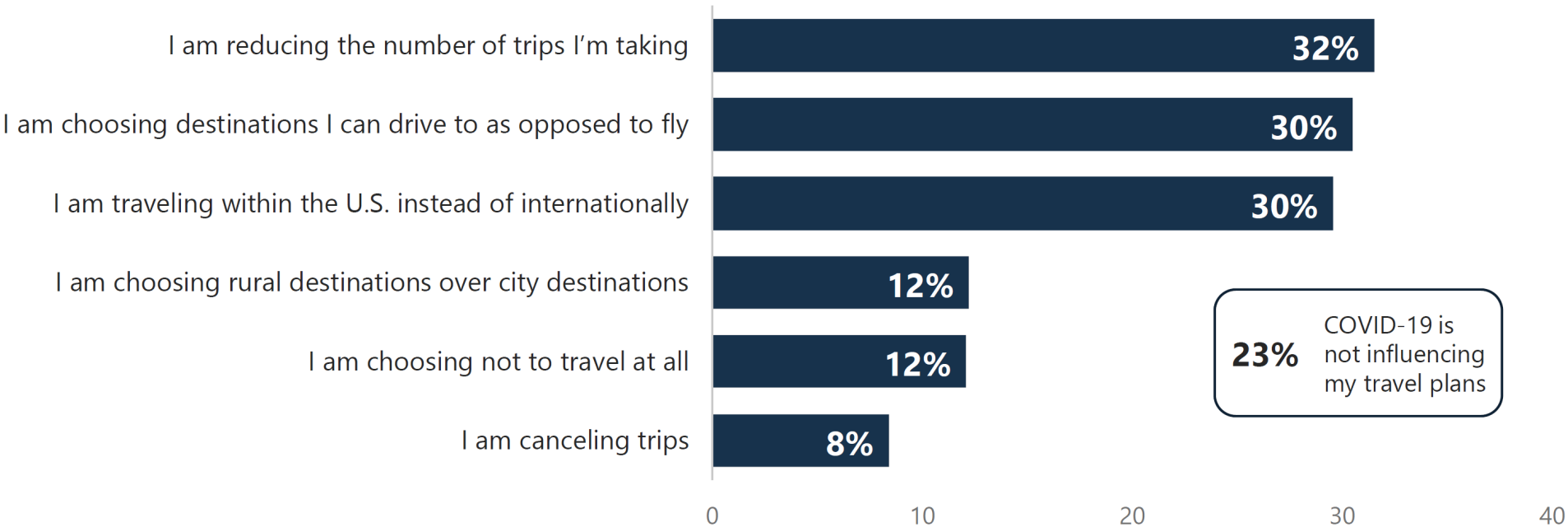
Stock of excess accumulated savings in 2020



Source : Oxford Economics/Haver Analytics

Some reshuffling of the deck

Influence of COVID-19 on Travel Plans in the Next Six Months

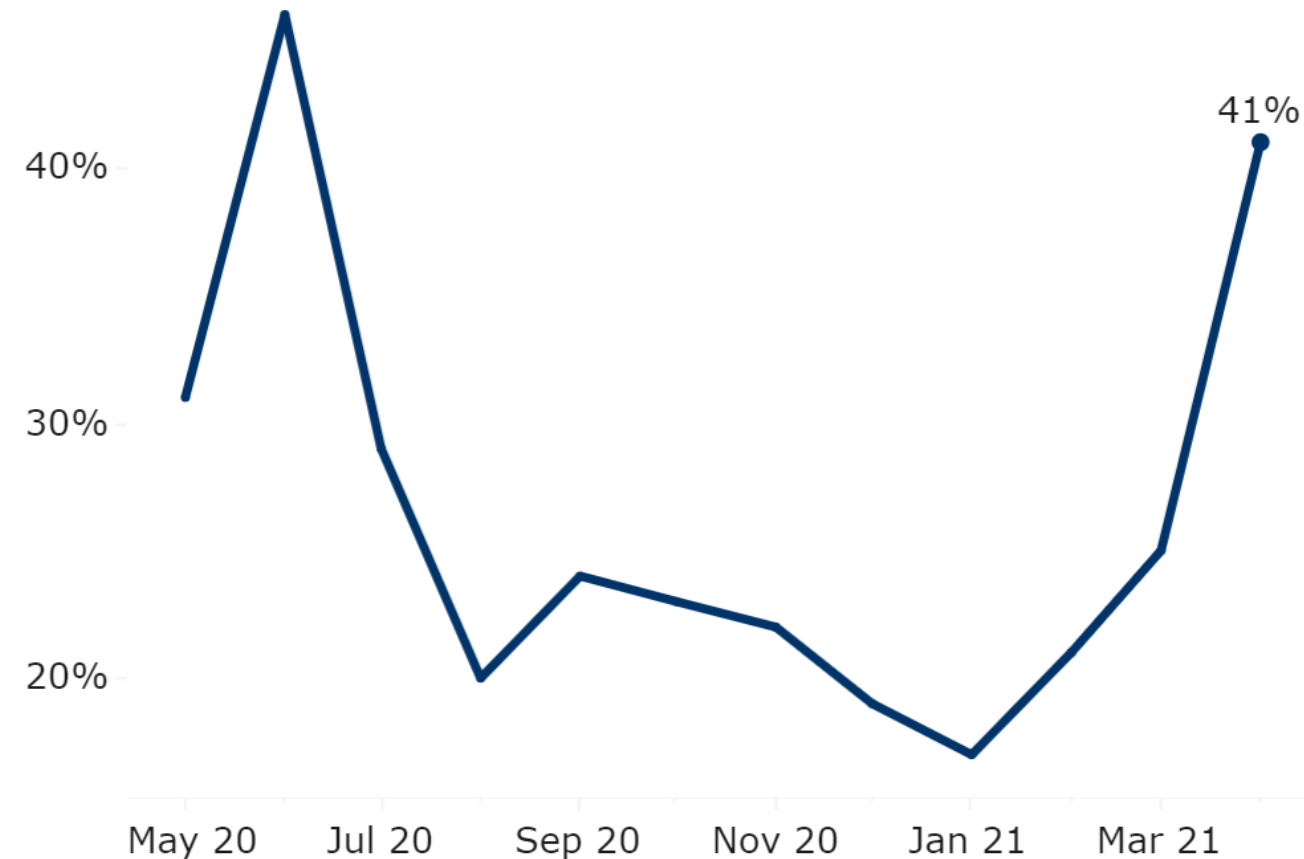


Travel Sentiment Study Wave 35

Business travel intentions are on the rebound

U.S. Business Travel Sentiment

Companies that plan to resume domestic travel in the next 1-3 months? ▼



Source: GBTA Business Travel Survey

Two-thirds of travelers are ready now

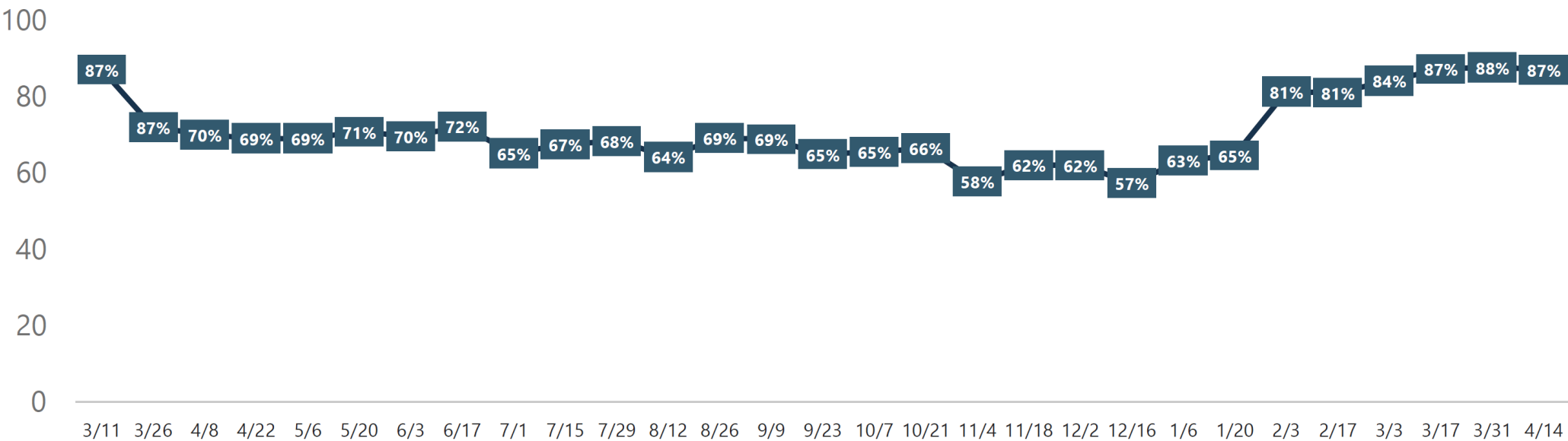
Consumer Travel Sentiment



Source: Destination Analysts

Intentions to travel are surging

Travelers with Travel Plans in the Next Six Months Comparison

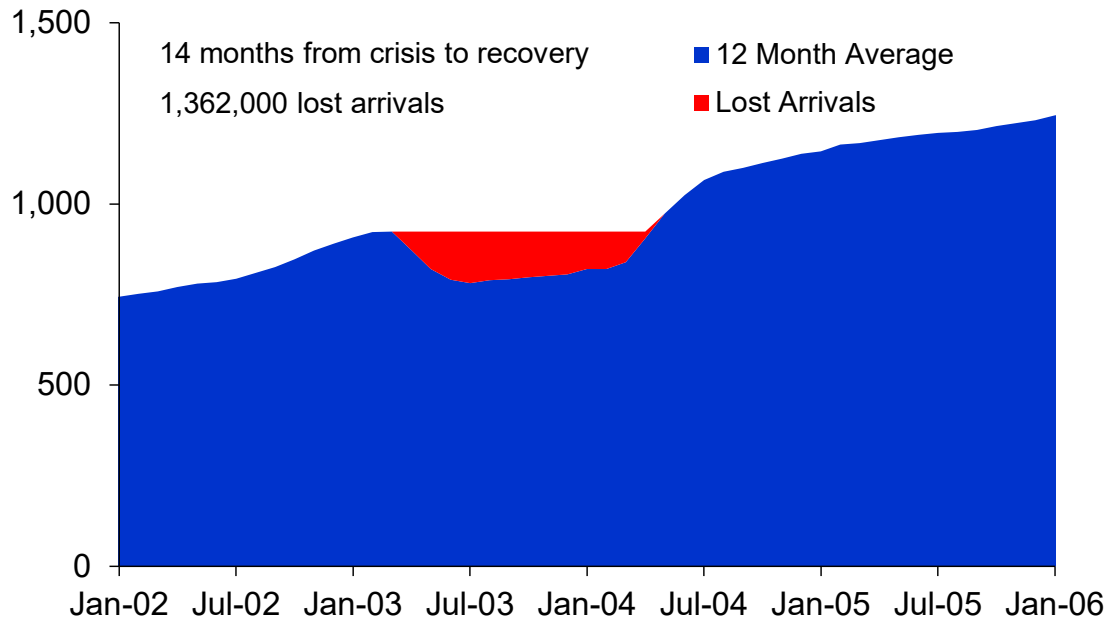


Travel Sentiment Study Wave 35

Recovery after a pandemic: 14-17 months

2003 SARS outbreak in Hong Kong

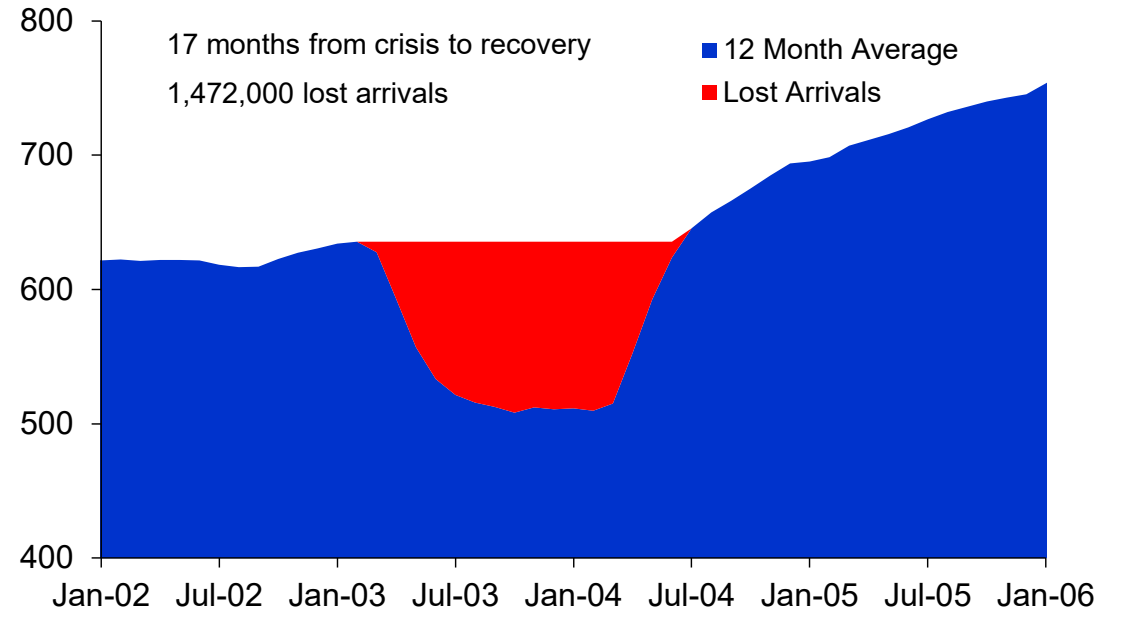
International arrivals (thousands)



Source: Tourism Economics

2003 SARS outbreak in Singapore

International arrivals (thousands)

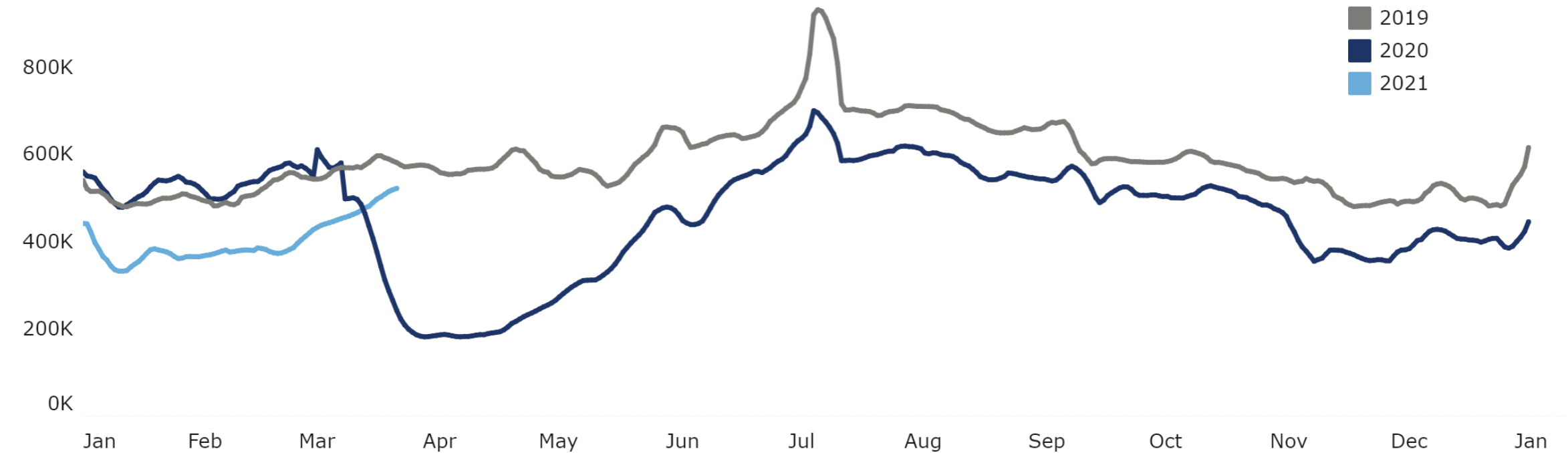


Source: Tourism Economics

And destination marketing will be critical to the recovery

Website Traffic

Organic search sessions to DMO/CVB websites, 7-day moving average



Source: Simpleview (250+ U.S. DMOs)

**Will there be an enduring
legacy of this crisis?**

Gratitude.

THANK YOU!

Adam Sacks
President
Tourism Economics
adam@tourismeconomics.com



April 2021

Caribbean Tourism Pulse

Presented by:



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

Quick Hits Caribbean Hotel Performance

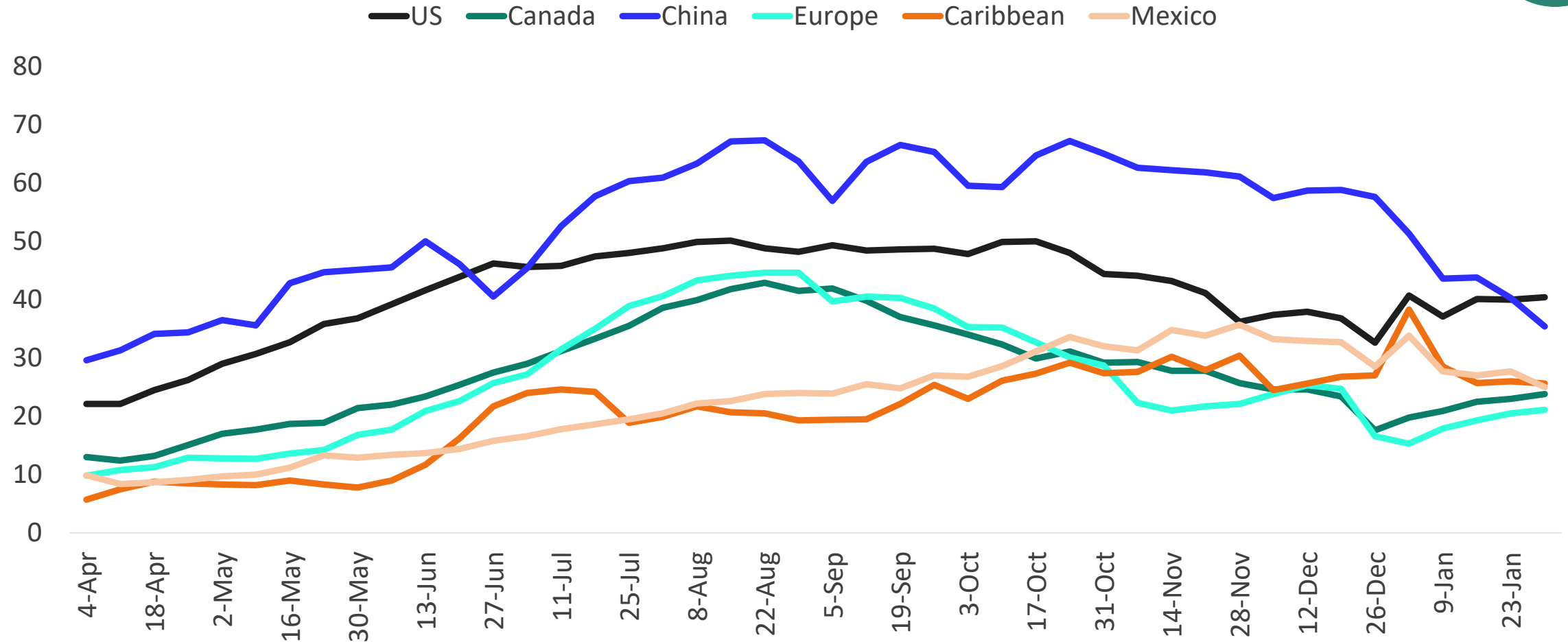


CARTER WILSON
SVP CONSULTING, STR

2020: A global situation



Select countries/regions, absolute occupancy %, rolling 7 days

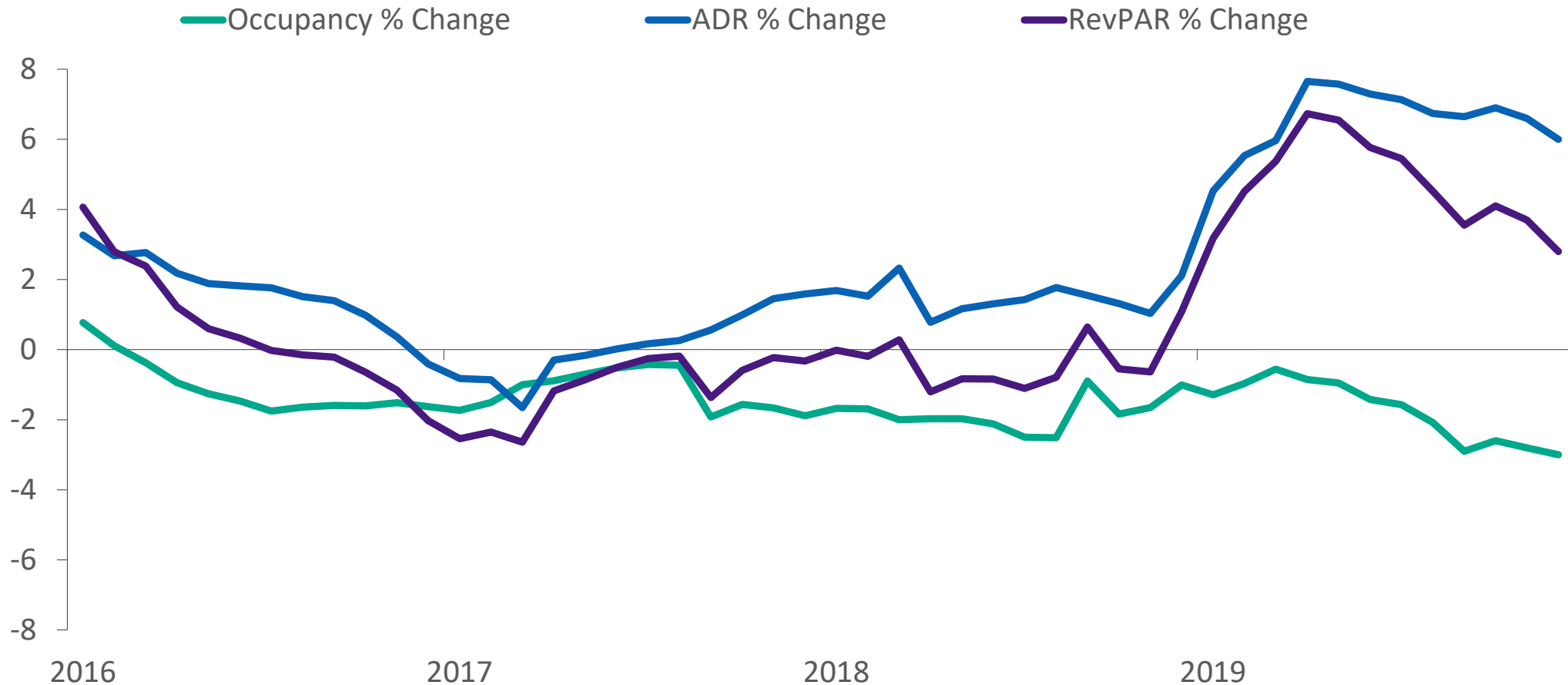


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Caribbean was rebounding in 2019 after Zika and 2018 hurricanes

Caribbean region, monthly KPI % Change, January 2016 – December 2019

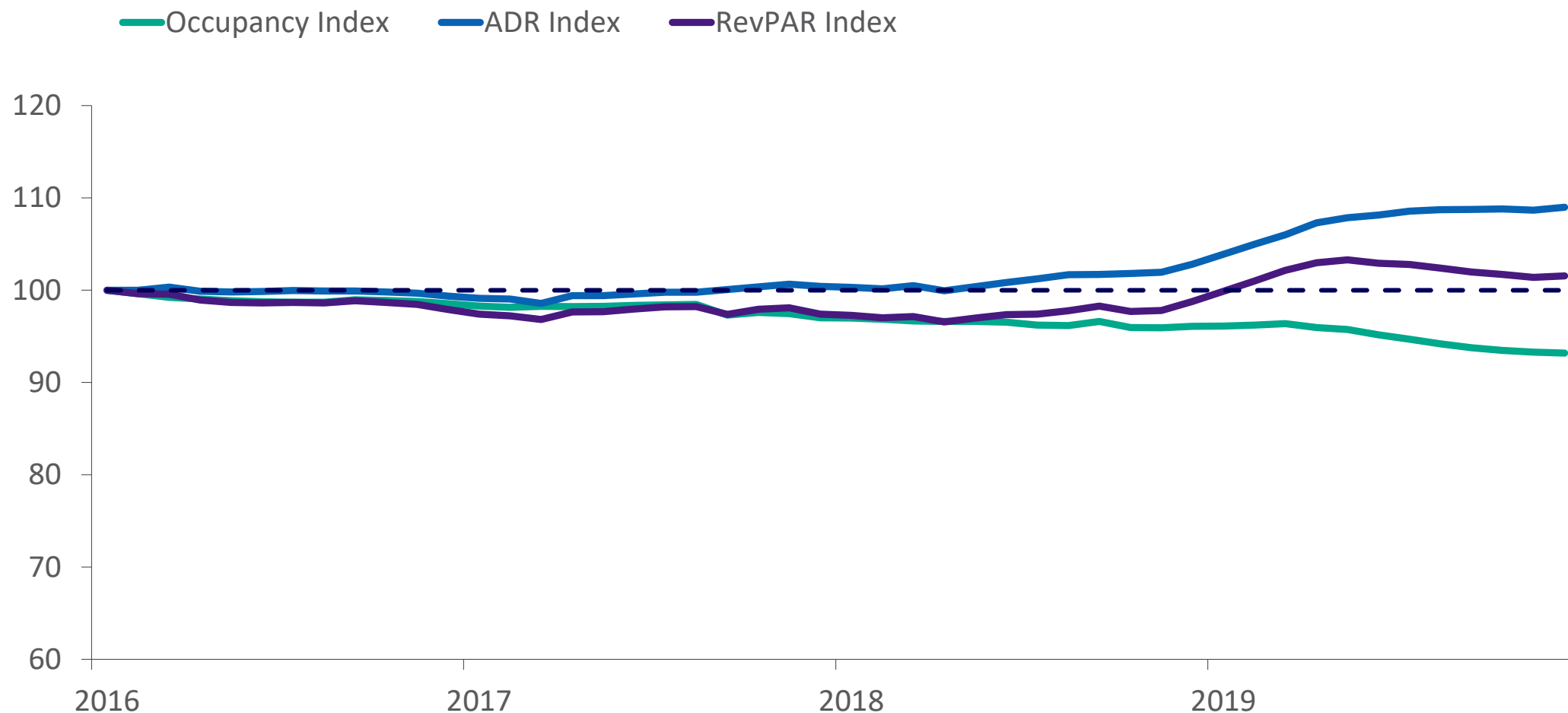


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Caribbean was rebounding in 2019 after Zika and 2018 hurricanes

Caribbean region, TTM KPI indexed to January 2016, January 2016 – December 2019

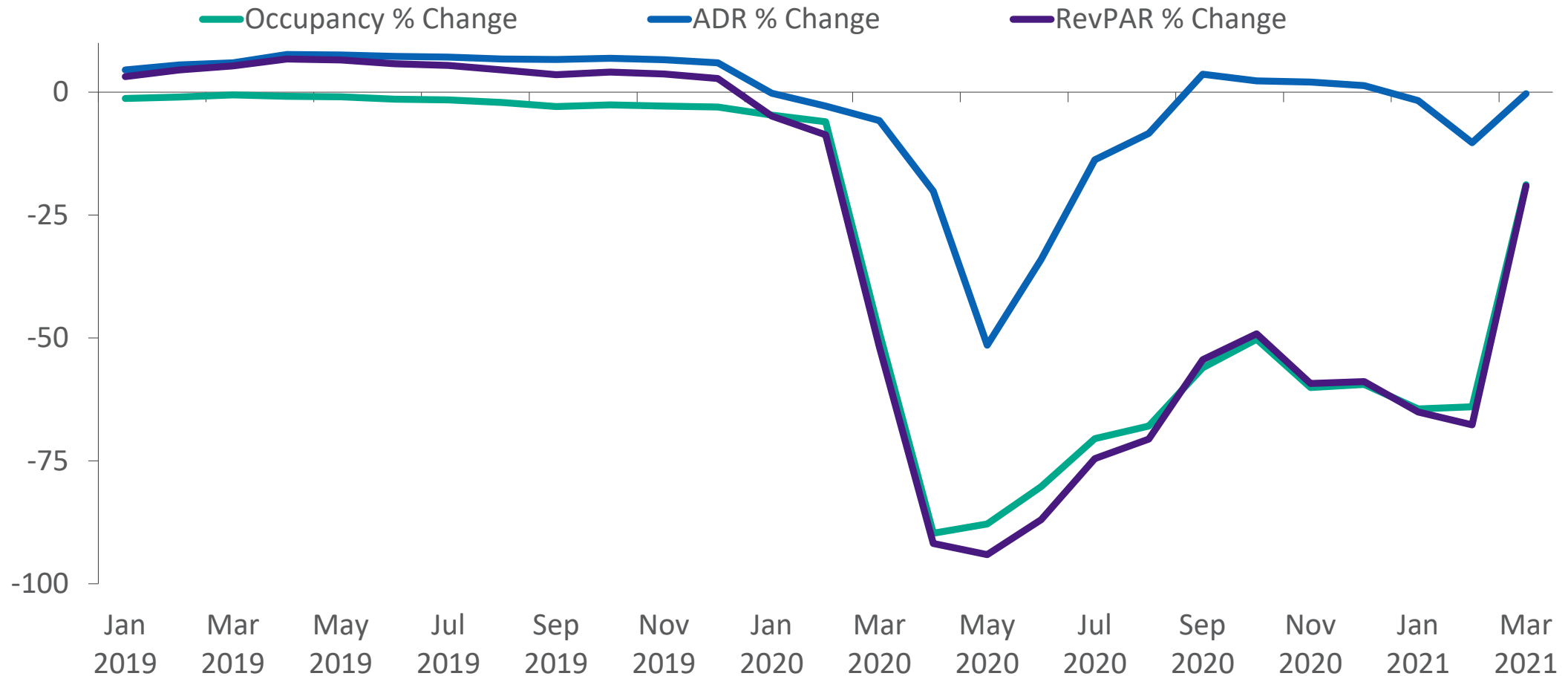


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Rate rebounded

Caribbean region, monthly KPI % Change, January 2019 – March 2021

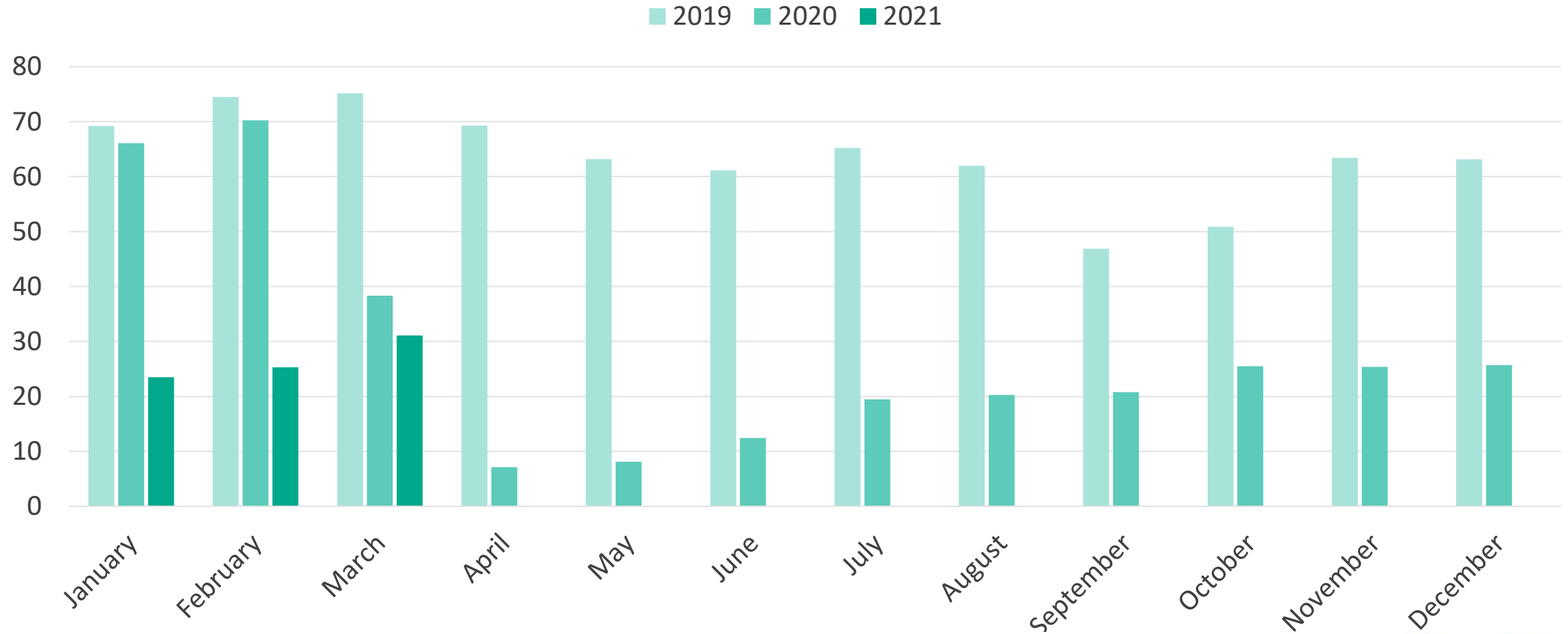


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



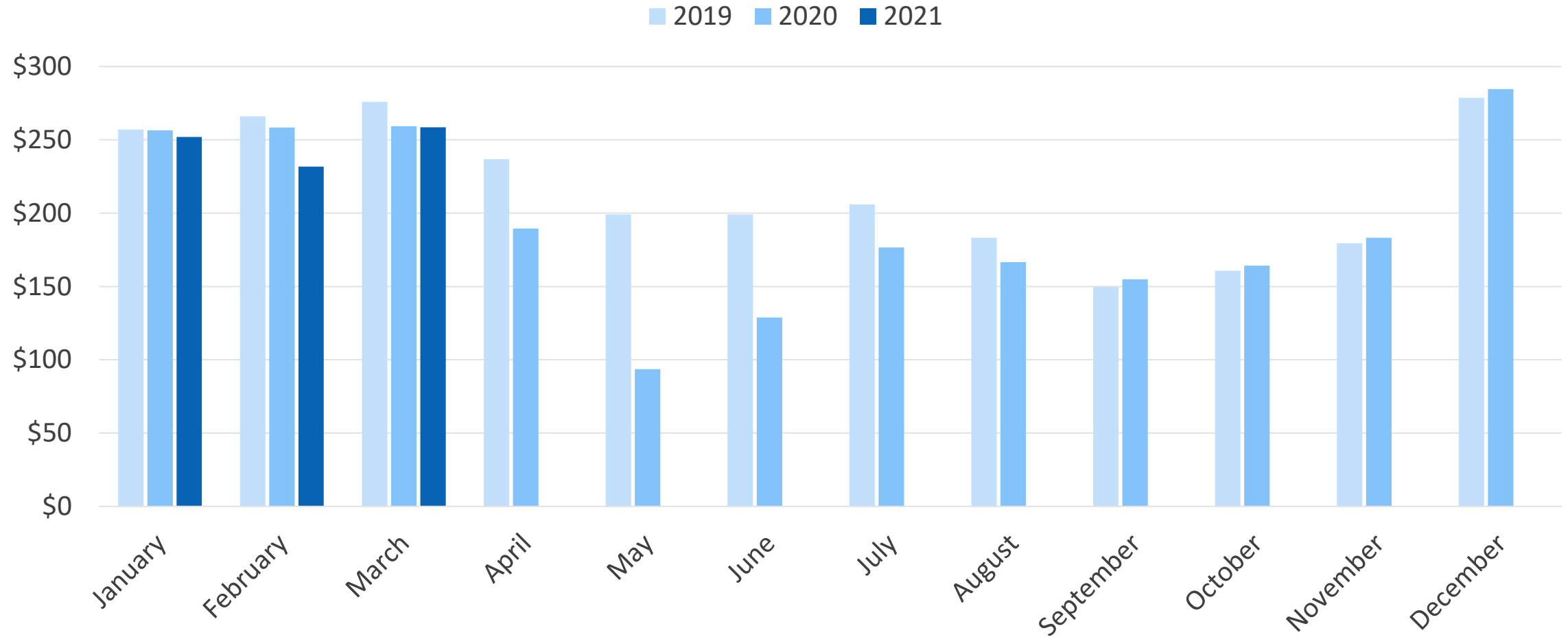
Occupancy still struggling to return

Caribbean region, monthly occupancy, January 2019 – March 2021



ADR at or near 2019 levels since September

Caribbean region, monthly ADR (USD), January 2019 – March 2021

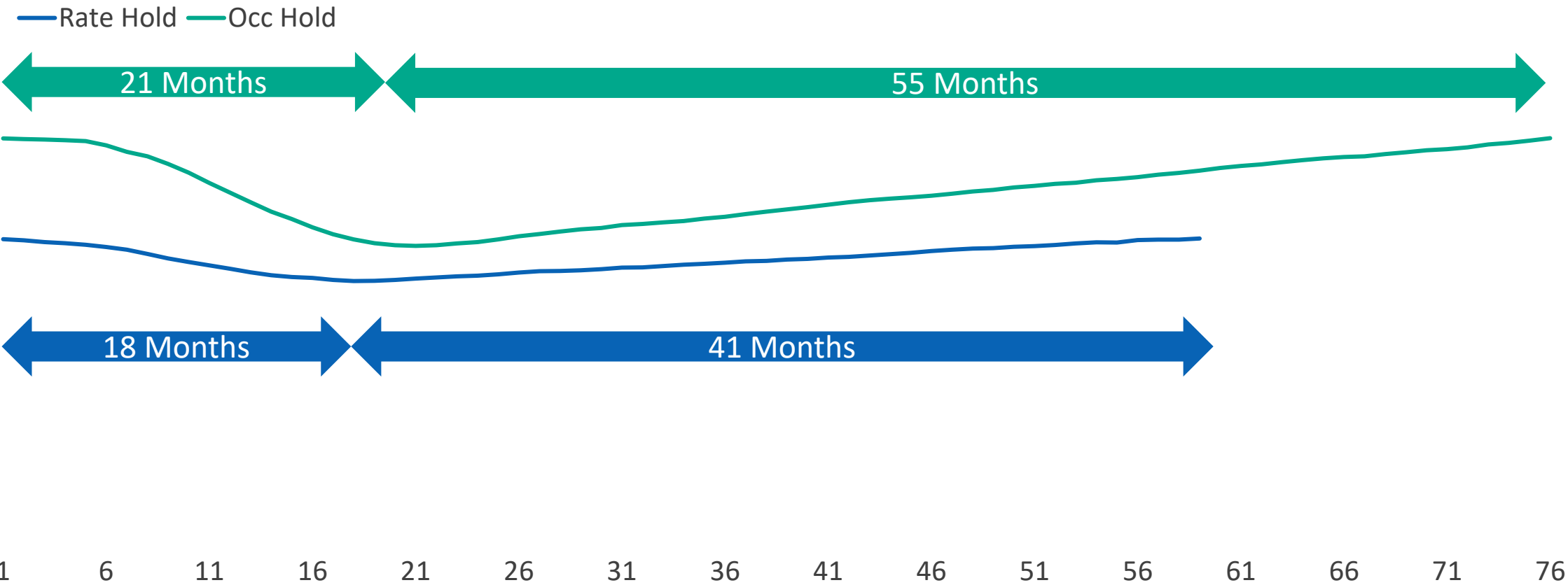


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



U.S. Hotels that Focused on Occupancy over Rate in 2009 Saw Longer Decline and Recovery

TTM RevPAR, 2009 Downturn

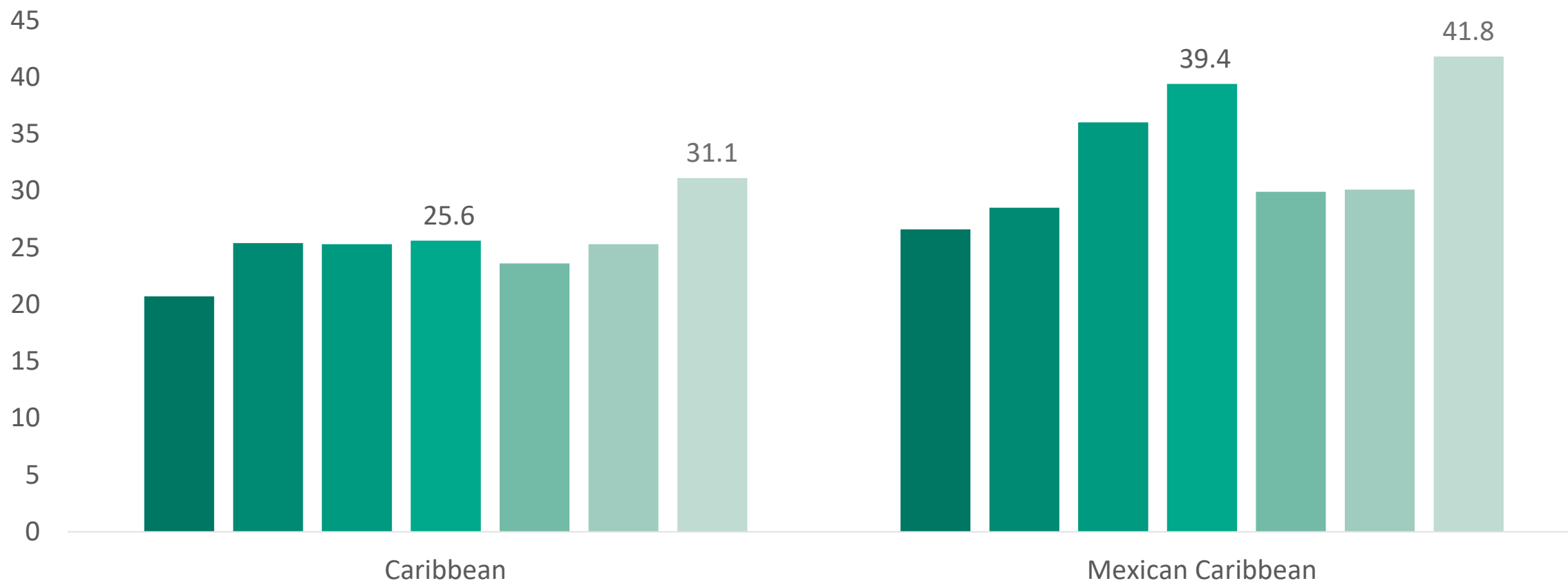


Caribbean islands recovery challenged by lack of drive-to demand

Region, monthly occupancy %, September 2020 – March 2021



■ Sept ■ Oct ■ Nov ■ Dec ■ Jan ■ Feb ■ Mar

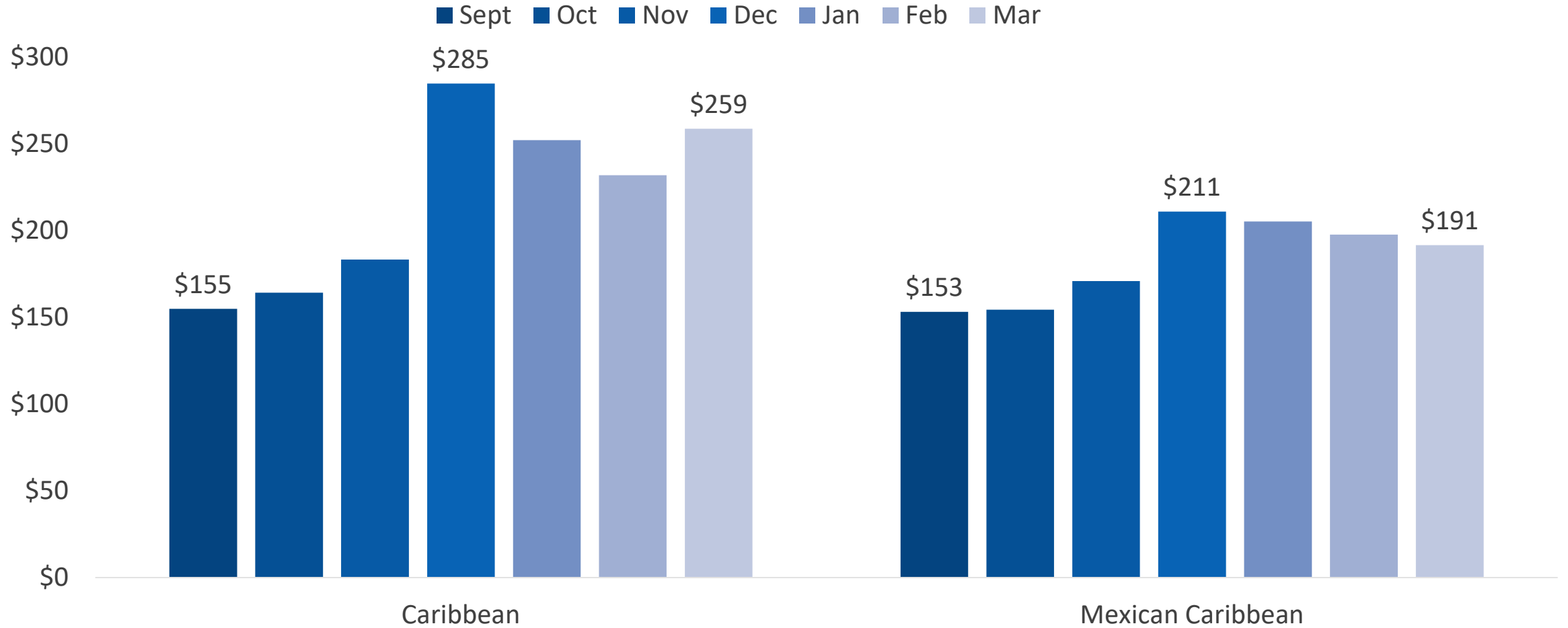


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Caribbean ADR Recovery Continues to Lead Region

Region, monthly ADR in USD, ending Mar 2021



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

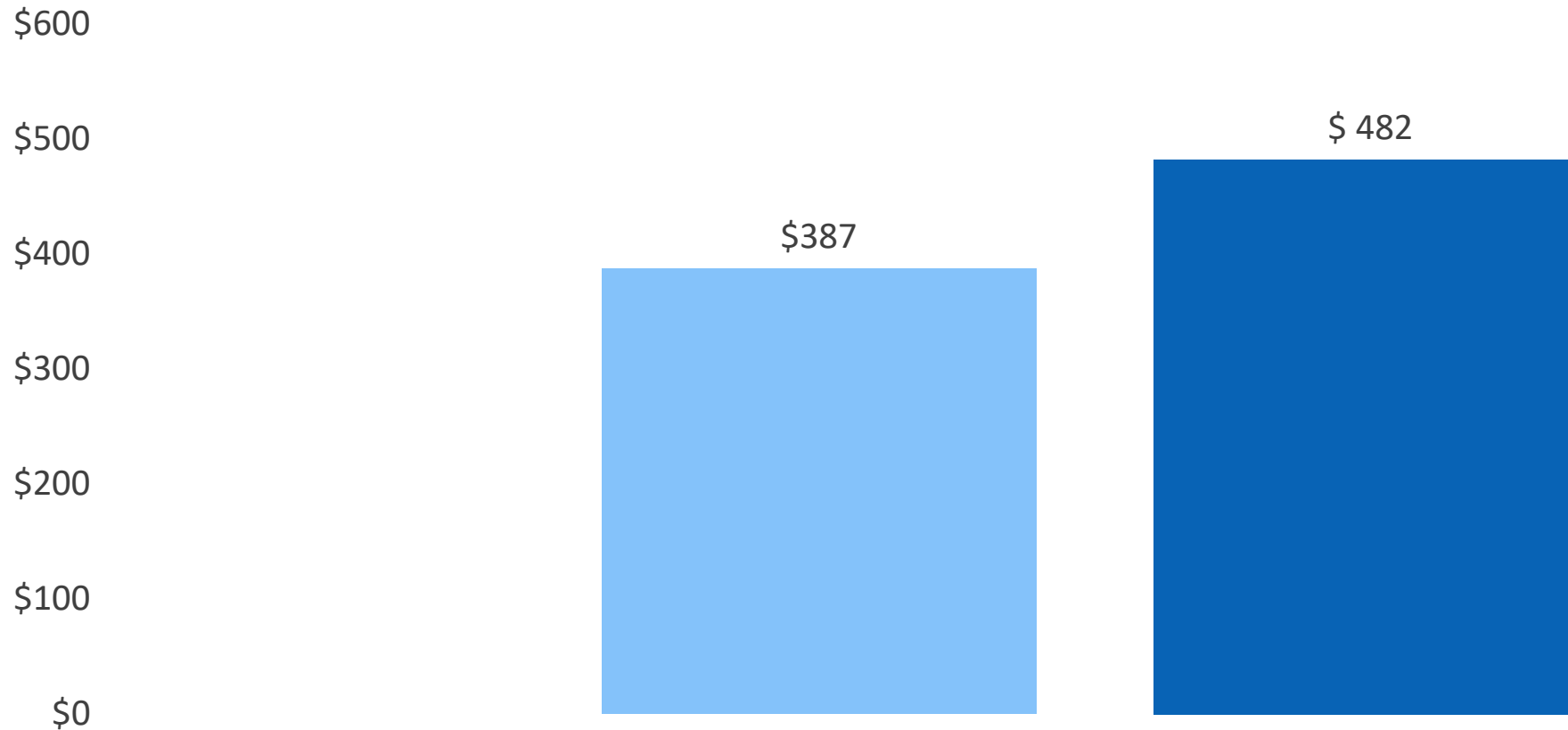


Caribbean islands luxury properties saw ADR gain in 2020

Luxury Class by Market/Region, Year-End ADR Performance in US \$



■ 2019 ■ 2020



Most markets at least 30% full in 2020

Caribbean Markets (sufficient data), Year-End Occupancy



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



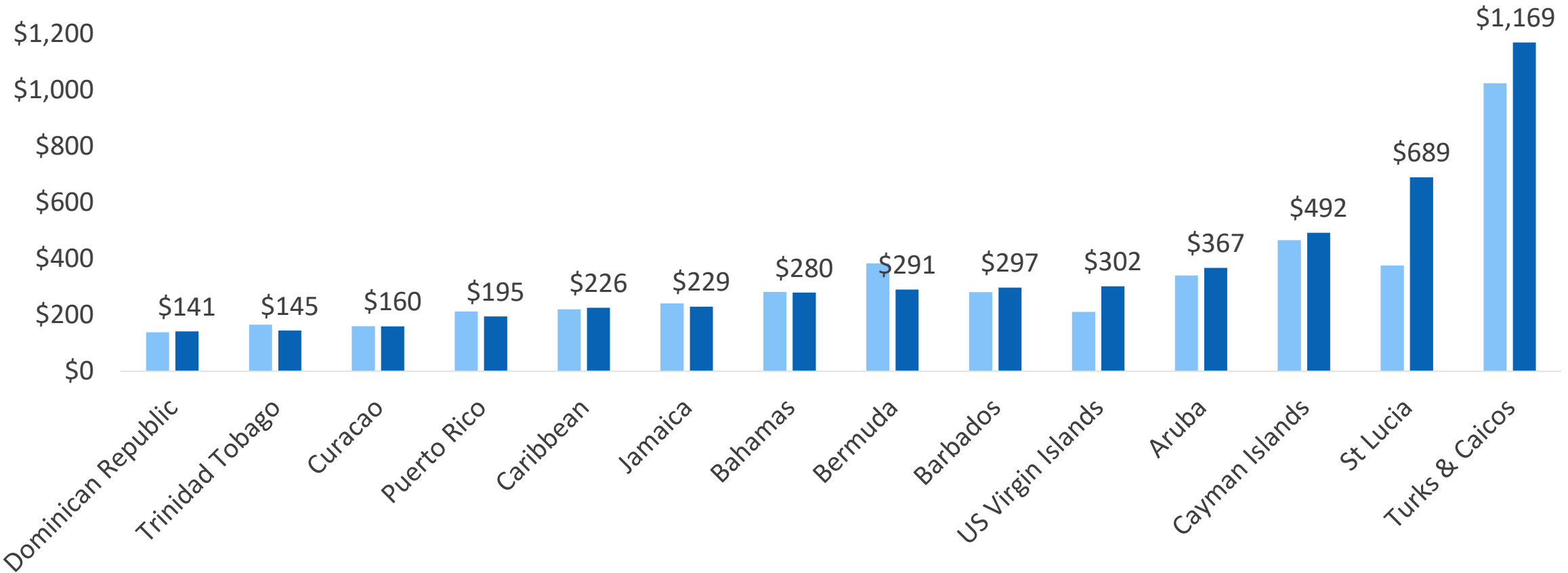
Most Caribbean markets held or grew ADR in 2020

Caribbean Market (sufficient data), Year-End ADR in US \$



2019

2020

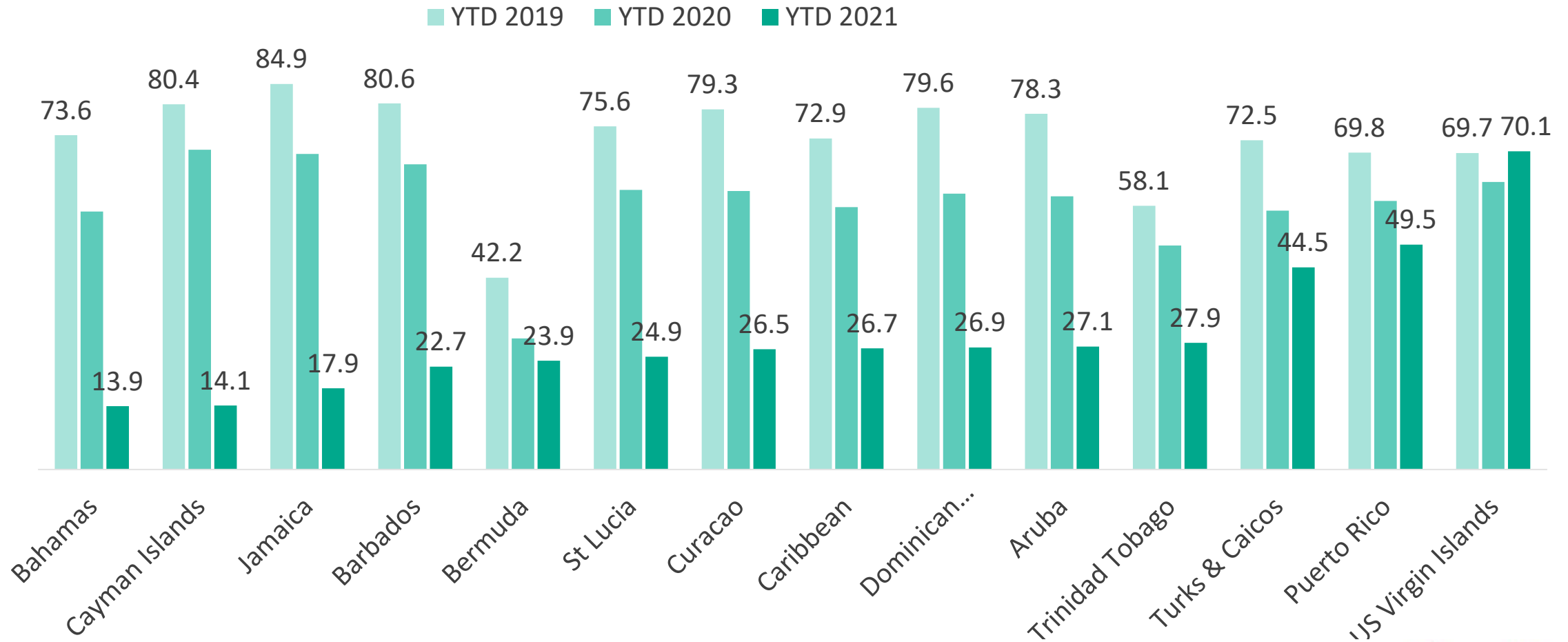


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



2021 Still a Struggle, but Recovering

Caribbean Markets (sufficient data), March YTD occupancy



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

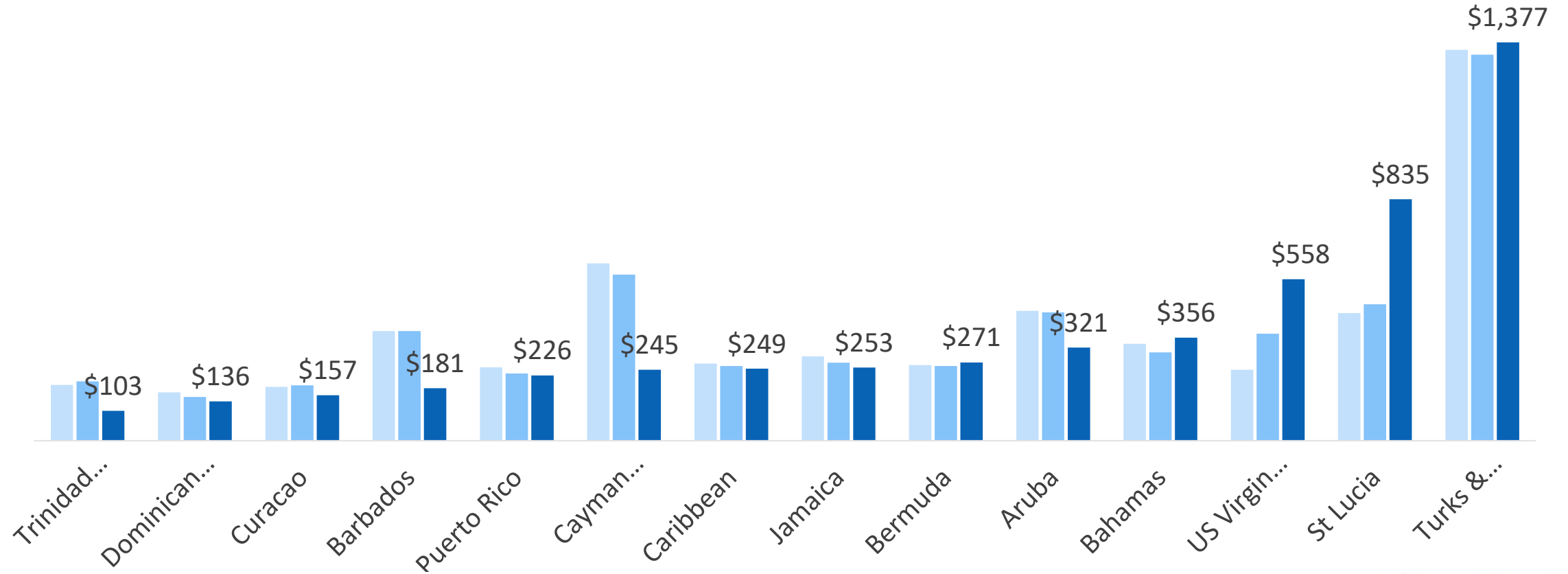


2021 ADR Remains Promising

Caribbean Markets (sufficient data), March YTD ADR (USD)



■ YTD 2019 ■ YTD 2020 ■ YTD 2021

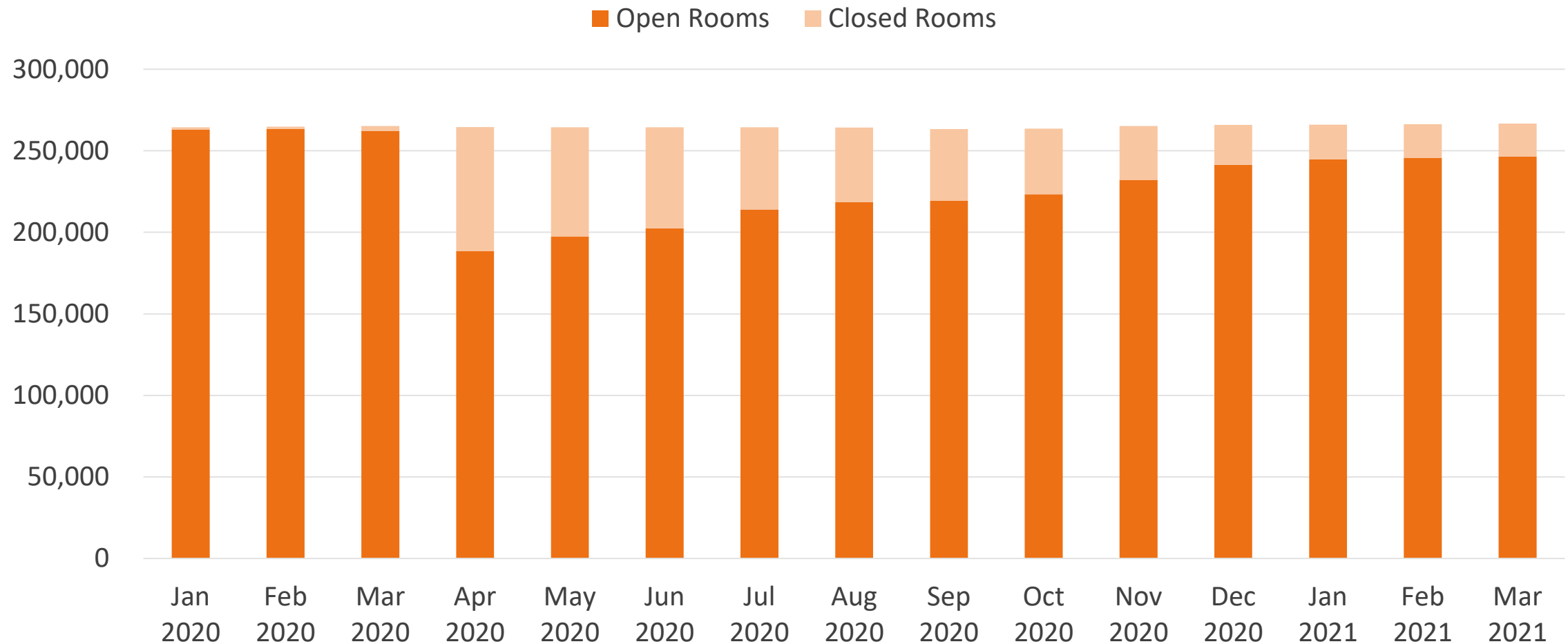


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Around 7% of Caribbean hotels still temporarily closed

Caribbean region, rooms open and temporarily closed by month, January 2020 – March 2021

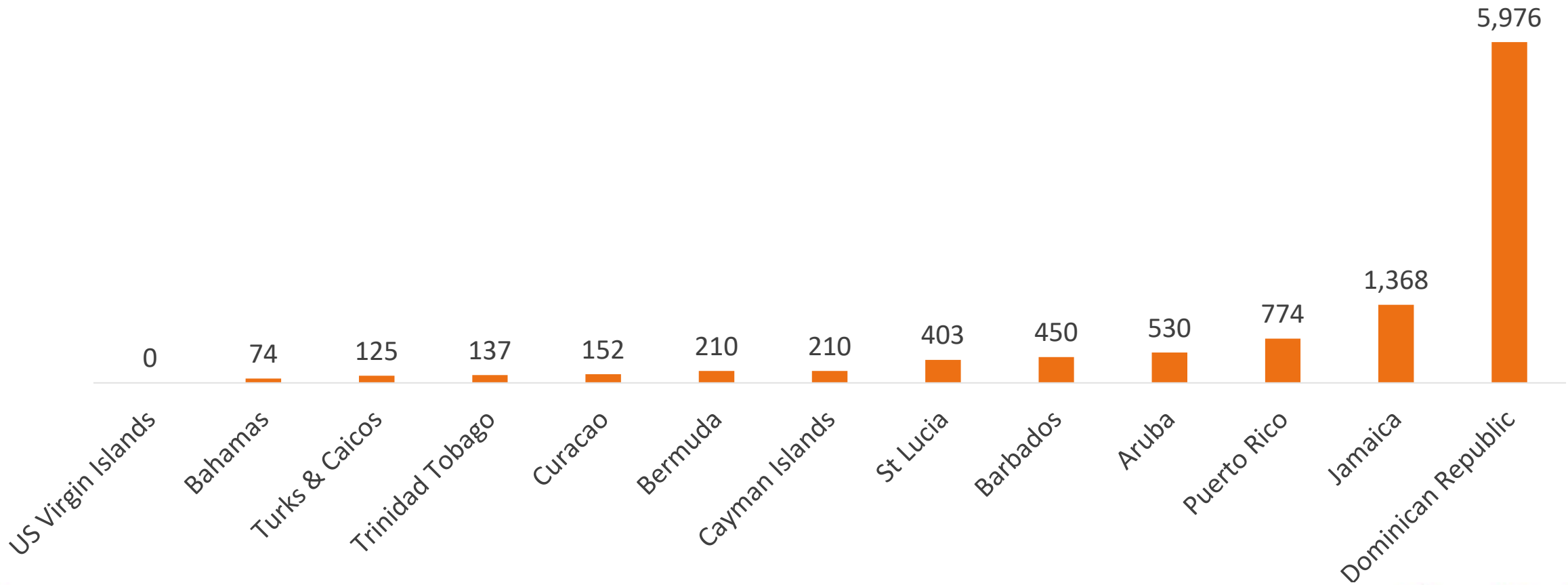


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Dominican Republic Most Exposed to New Supply

Caribbean Markets, rooms under construction



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Takeaways



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Contact Information

Carter Wilson

Senior Vice President, Consulting

STR

cwilson@str.com



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Aviation Industry Outlook and its impact on Caribbean Tourism

Olivier Ponti, VP Insights

April 2021



ForwardKeys data captures and reflects the entire traveller journey



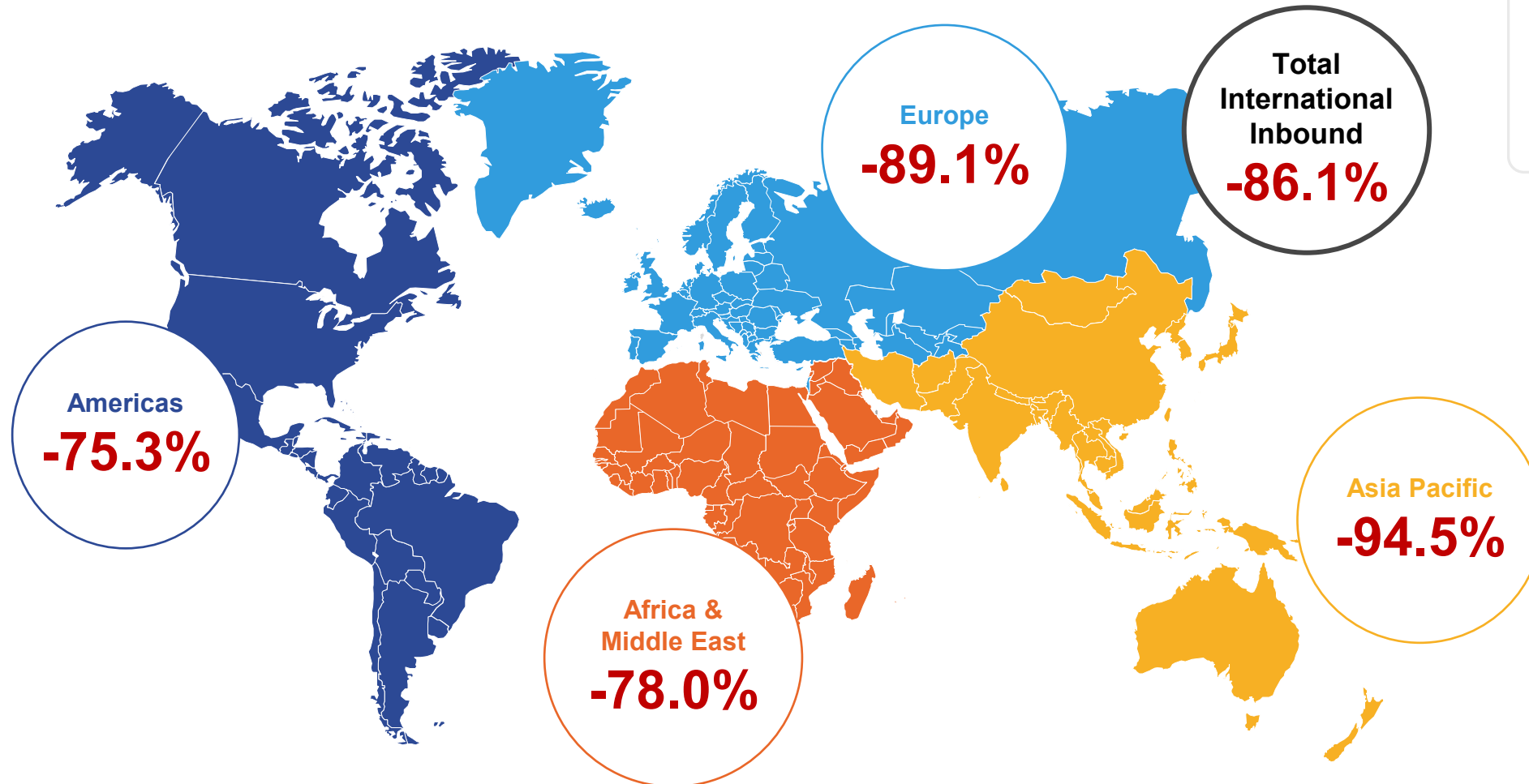


Key Learnings of 2021

The Americas – The most resilient continent YTD 2021

2021 YTD global international arrivals*

1 Jan to 22 Apr 2021; Year-on-Year variations by region



Arrivals from 1 Jan to 22 Apr 2021 vs same period in 2019.



Only considered pax staying 1 to 22 nights and more at destinations.



Source: ForwardKeys Air Ticket Data.

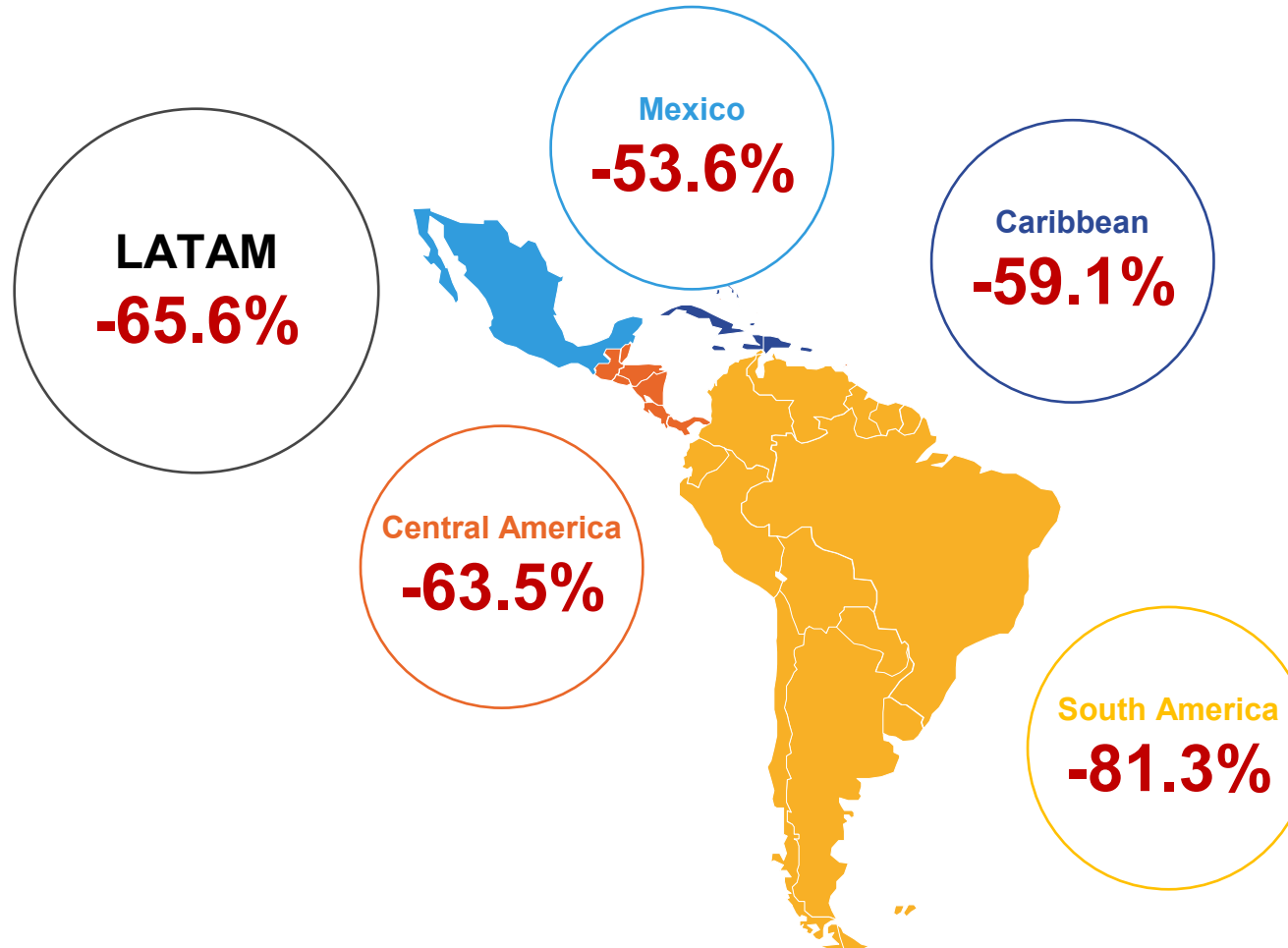
* excluding domestic

Mexico and the Caribbean reactivating the region



2021 YTD global international arrivals* in LATAM

1 Jan to 22 Apr 2021; Year-on-Year variations by region



Arrivals from 1 Jan to 22 Apr 2021 vs same period in 2019.



Only considered pax staying 1 to 22 nights and more at destinations.



Source: ForwardKeys' Air Ticketing Data.

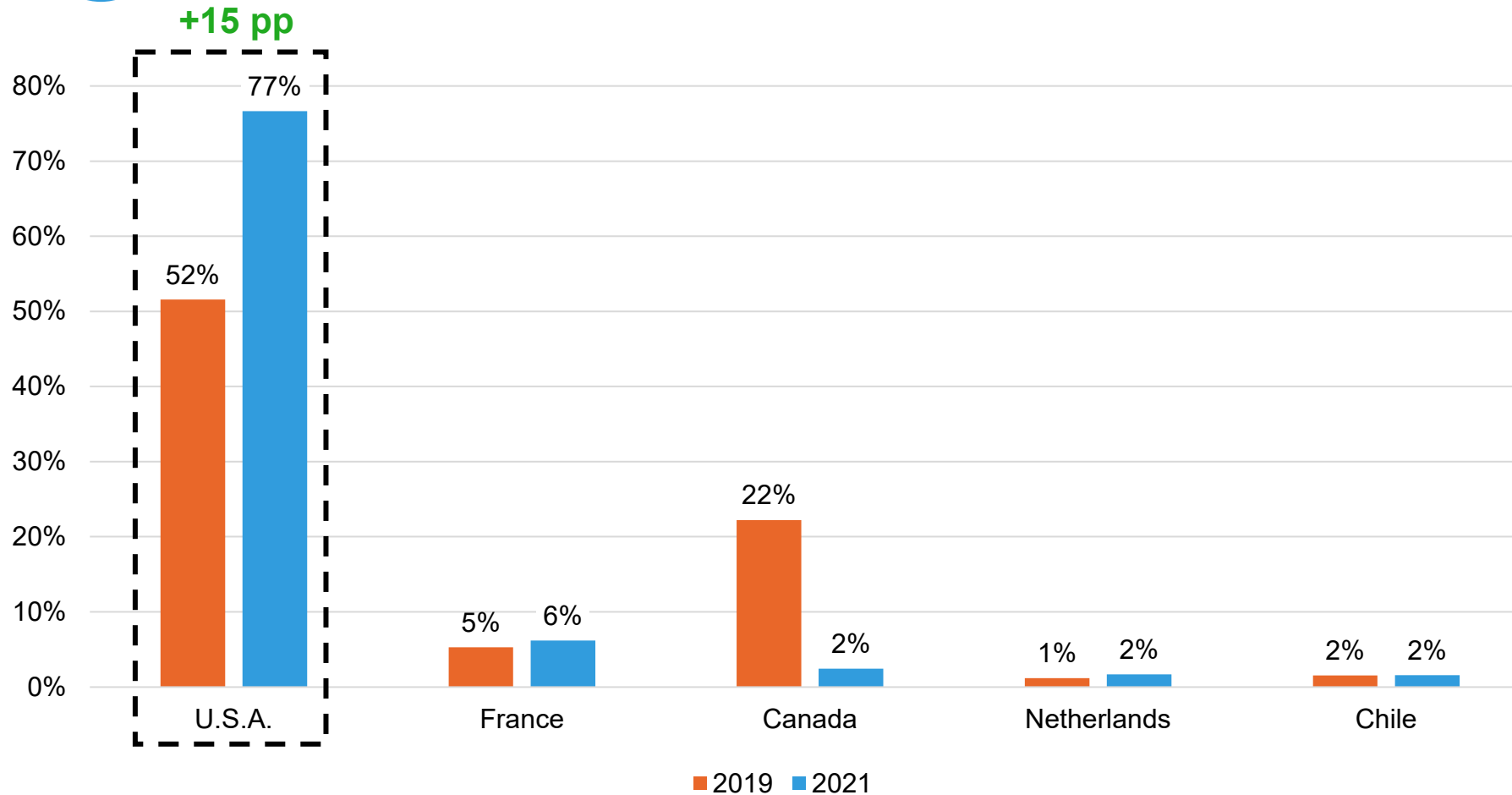
* excluding Domestic travel




US – Top source market to the Caribbean in Q1



Q1 top international arrivals* to the Caribbean

1 January to 31 March 2021; vs same time 2019

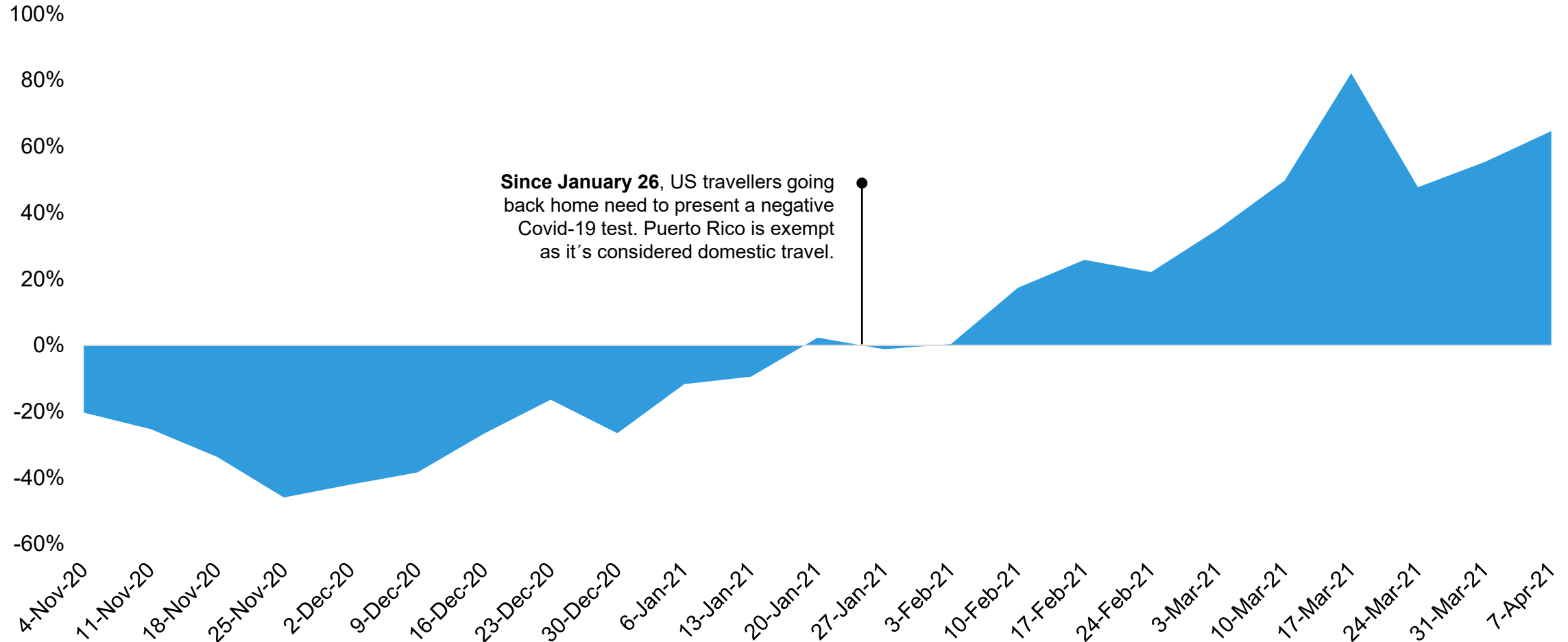


-  Arrivals from 1 Jan to 31 Mar 2021 vs same period in 2019
-  Only considered pax staying 1 to 22 nights and more at destination.
-  Source ForwardKeys' Air Ticketing Data.

Puerto Rico benefits from regulation changes

Ticketing history for US travel to San Juan (PR)

%YoY of 2019's level, from 04 November 2020 to 13 April 2021 vs 2019

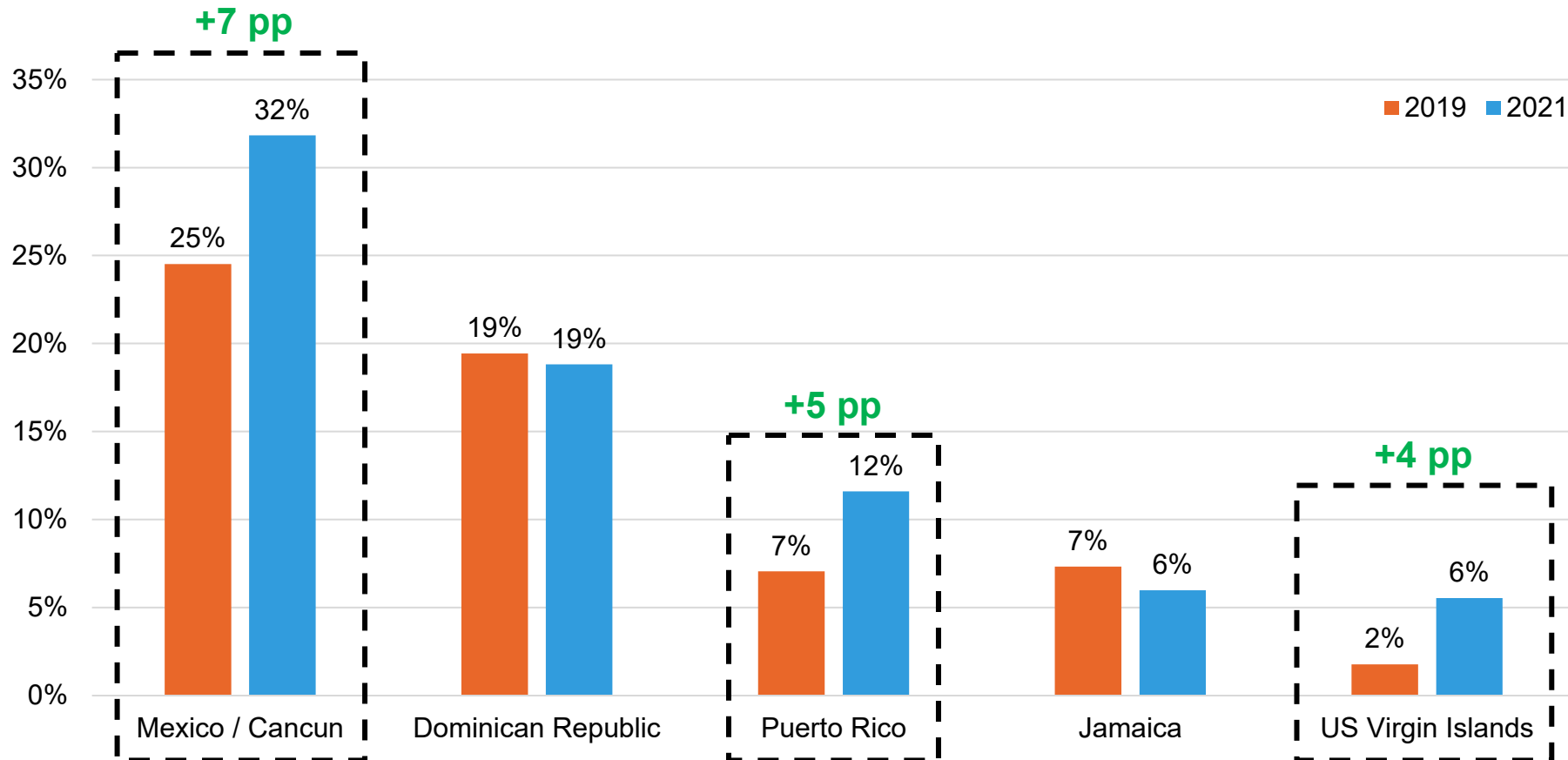


Cancun gaining market share in the region



Q1 global international arrivals* in Caribbean

1 January to 31 March 2021; vs same period 2019



Arrivals from 1 Jan to 31 Mar 2021 vs same period in 2019.



Only considered pax staying 1 to 22 nights and more at destination.

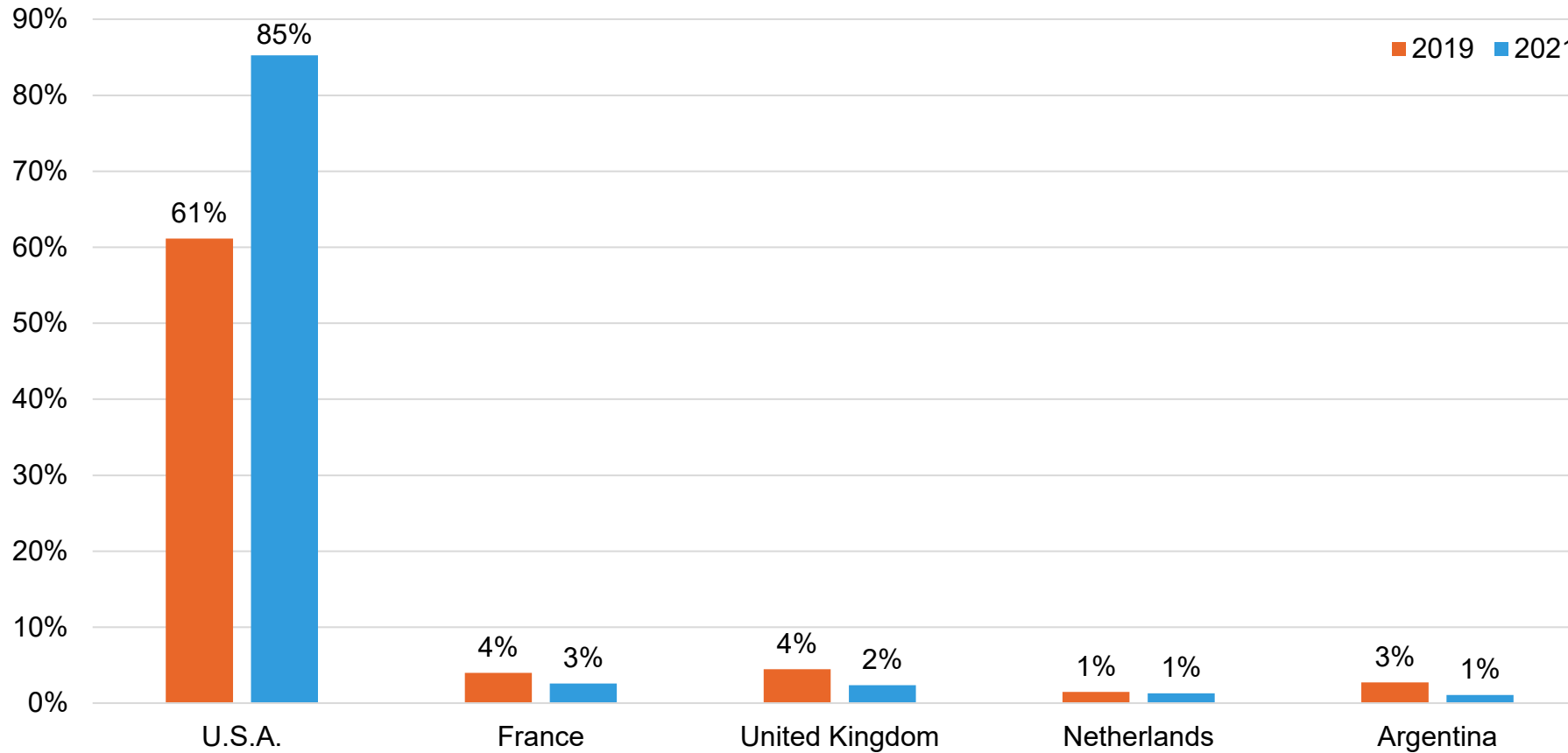





Source ForwardKeys Air Ticket Data.

USA continues to lead the Caribbean reactivation

Outlook for travel* in Q2 and Q3 2021

% Share of confirmed tickets



-  Arrivals from 1 Apr to 30 Sep 2021 vs same period in 2019
-  Only considered pax staying 1 to 22 nights and more at destination.
-  Source ForwardKeys Air Ticket Data.

* excluding Domestic travel



US traveller focus

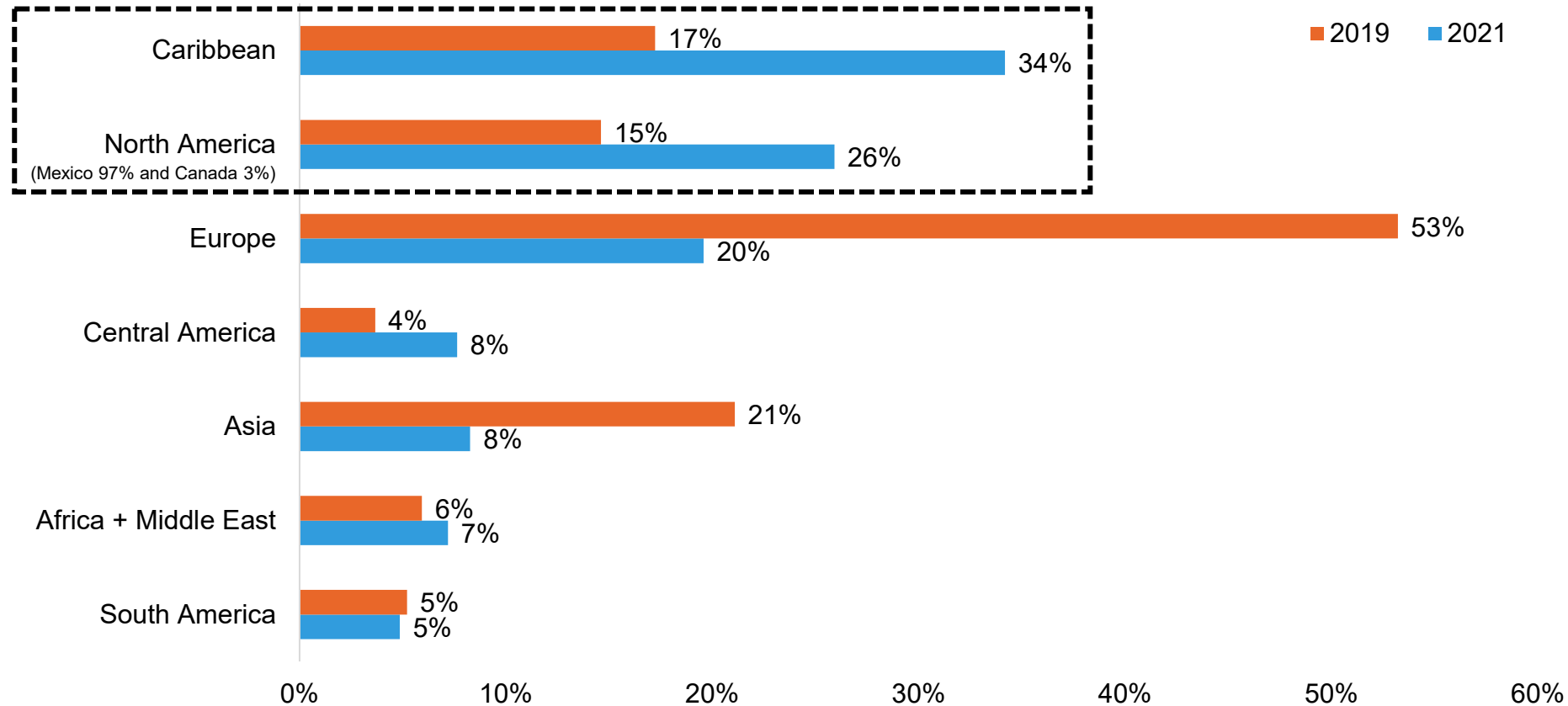



ForwardKeys


Most USA departures in 2021 are to the Caribbean and Mexico


Outlook for USA departures* in Q2 and Q3 2021

% Share of confirmed tickets



 Departures from 1 Apr to 30 Sep 2021 vs same period in 2019

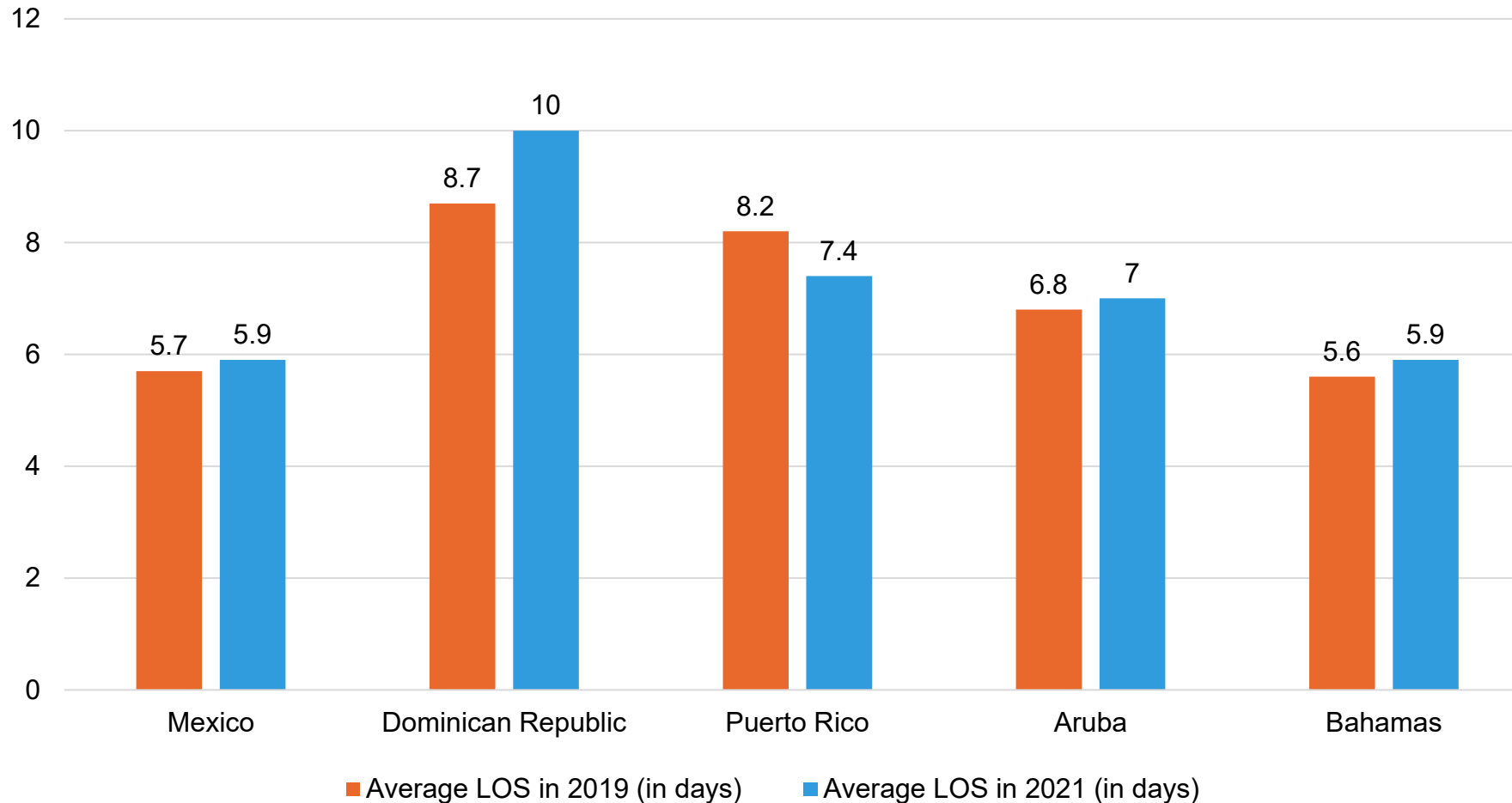
 Only considered pax staying at least 1 night at destination.




 Source ForwardKeys Air Ticket Data.

*** excluding Domestic travel**

American travellers increase their length of stays

Tickets for Q2 and Q3, 2021 vs same period 2019 for travel from US to the Caribbean and Mexican Caribbean

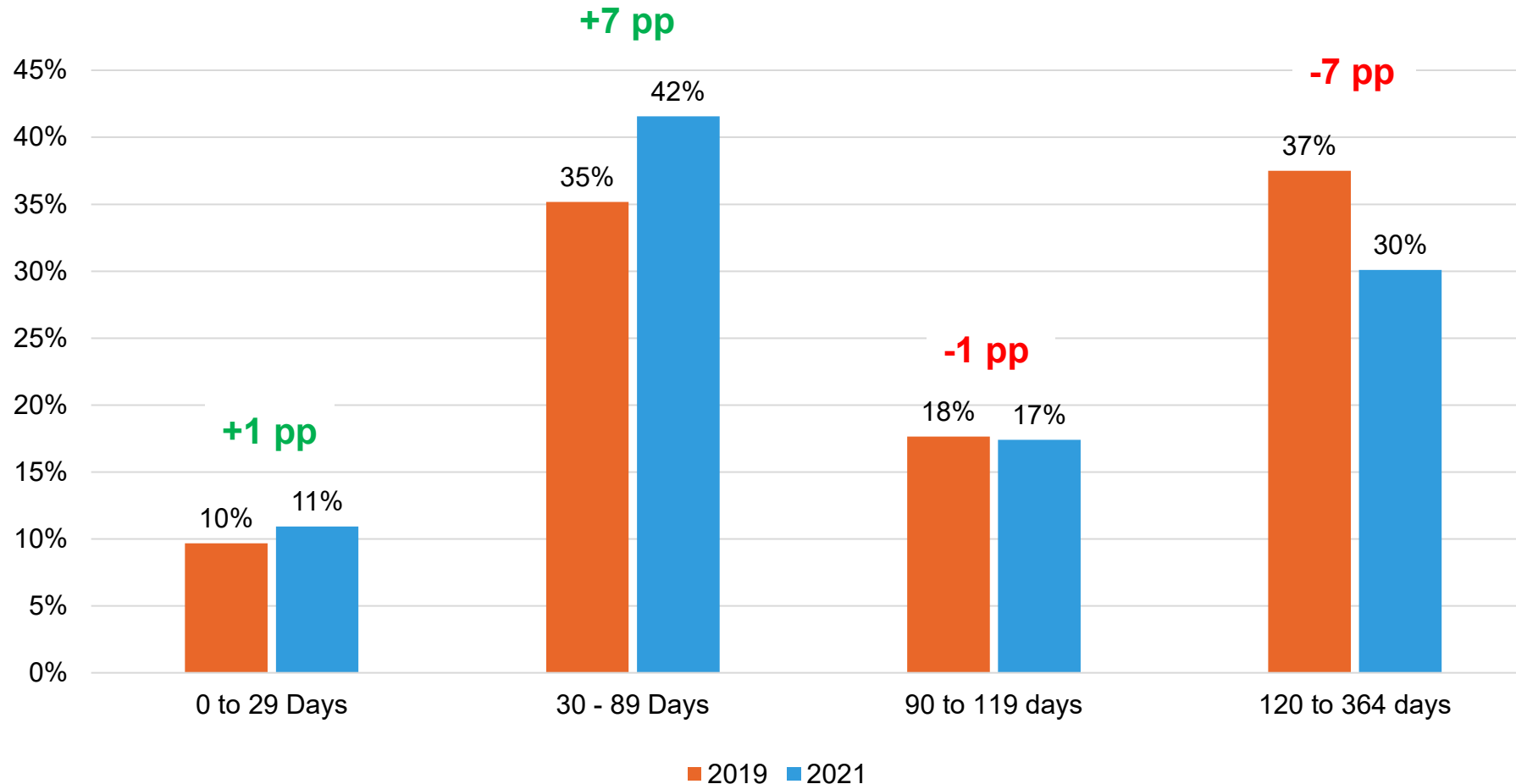



-  Arrivals from 1 Apr to 30 Sep 2021 vs same period in 2019
-  Only considered pax staying 1 to 22 nights and more at destination.
-  Source ForwardKeys Air Ticket Data.


*** excluding Domestic travel**


More US travellers book “last-minute”

Tickets for Q2 and Q3, 2021 vs same period 2019 for travel from US to Caribbean and Mexican Caribbean



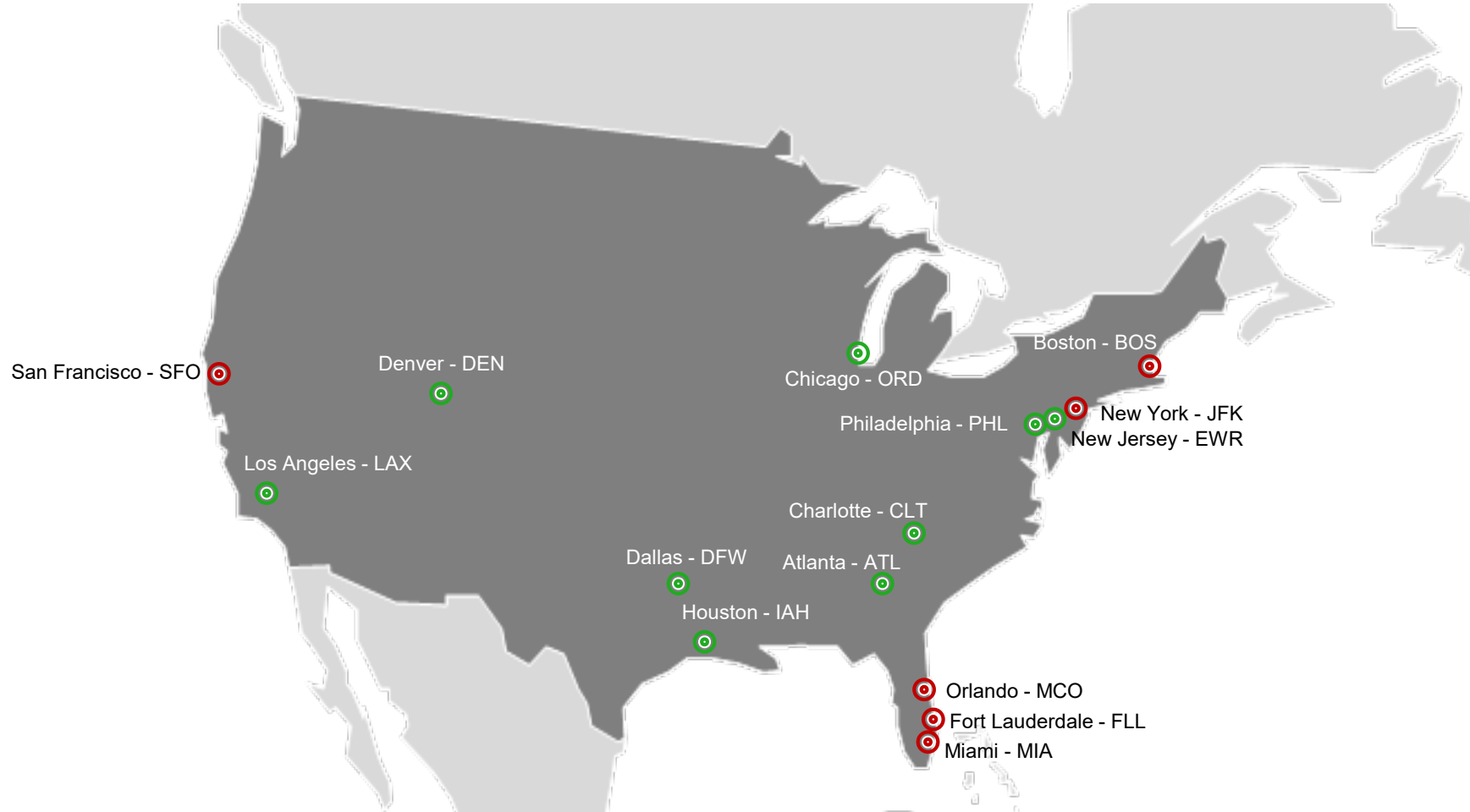
 Arrivals from 1 Apr to 30 Sep 2021 vs same period in 2019,




 Only considered pax staying 1 to 22 nights and more at destination.

 Source ForwardKeys Air Ticket Data.

*** excluding Domestic travel**

Rising number of flights from the US to the Caribbean



-  Departures from 1 Apr to 30 Sep 2021 vs same period in 2019
-  Only considered pax staying 1 to 22 nights and more at destination.
-  Source ForwardKeys Air Ticket Data.

 Airports underperforming vs 2019

 Airports overperforming vs 2019

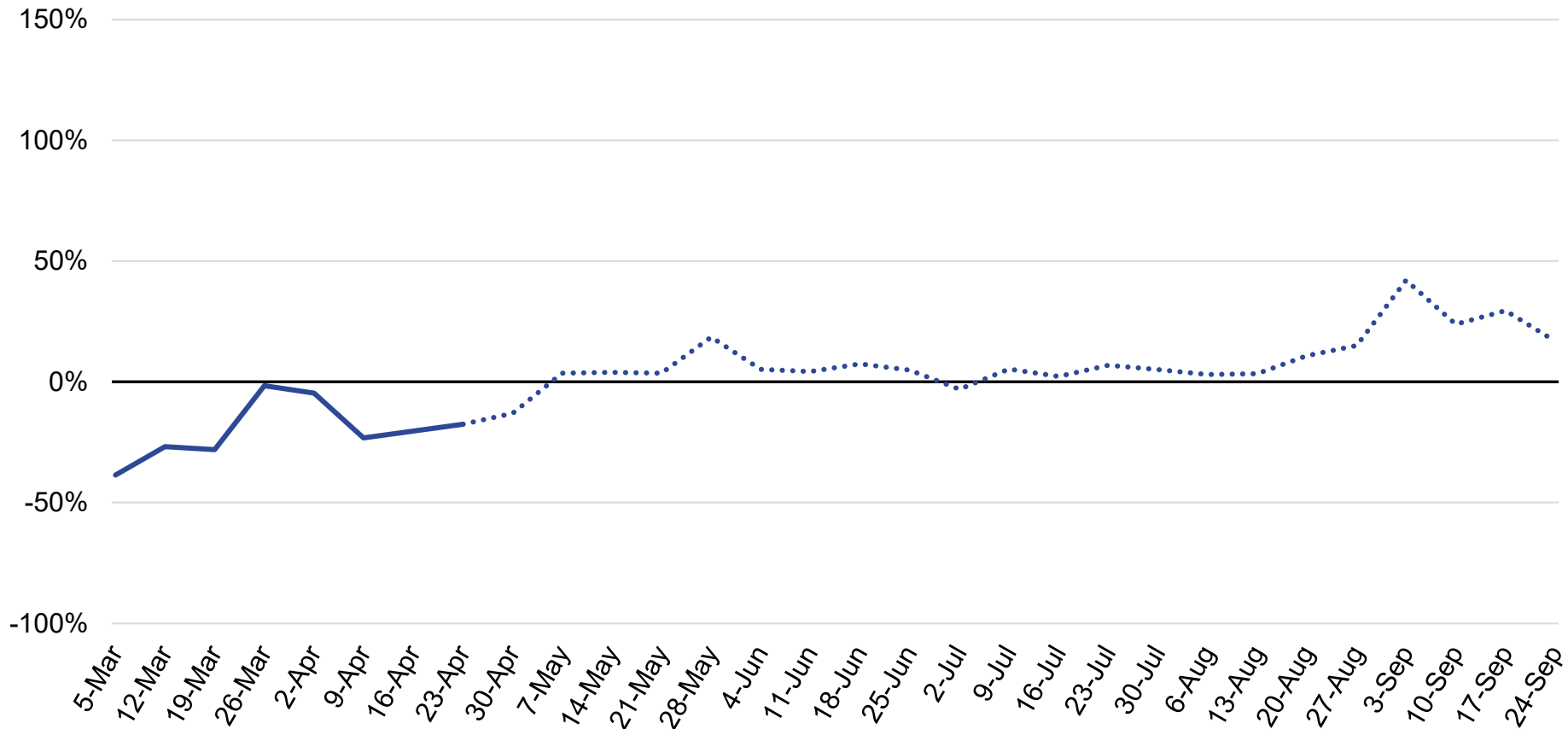
Issued tickets by key destinations



Confirmed tickets to key destinations

Tickets for USA travel between 01 Mar and 30 Sep vs same period 2019, with tickets up to 20 April 2021

— Caribbean



Arrivals from 1 Mar to 30 Sep 2021 vs same period 2019.



Only considered pax staying 1 to 22 nights and more at destination.



Source ForwardKeys Air Ticket Data.

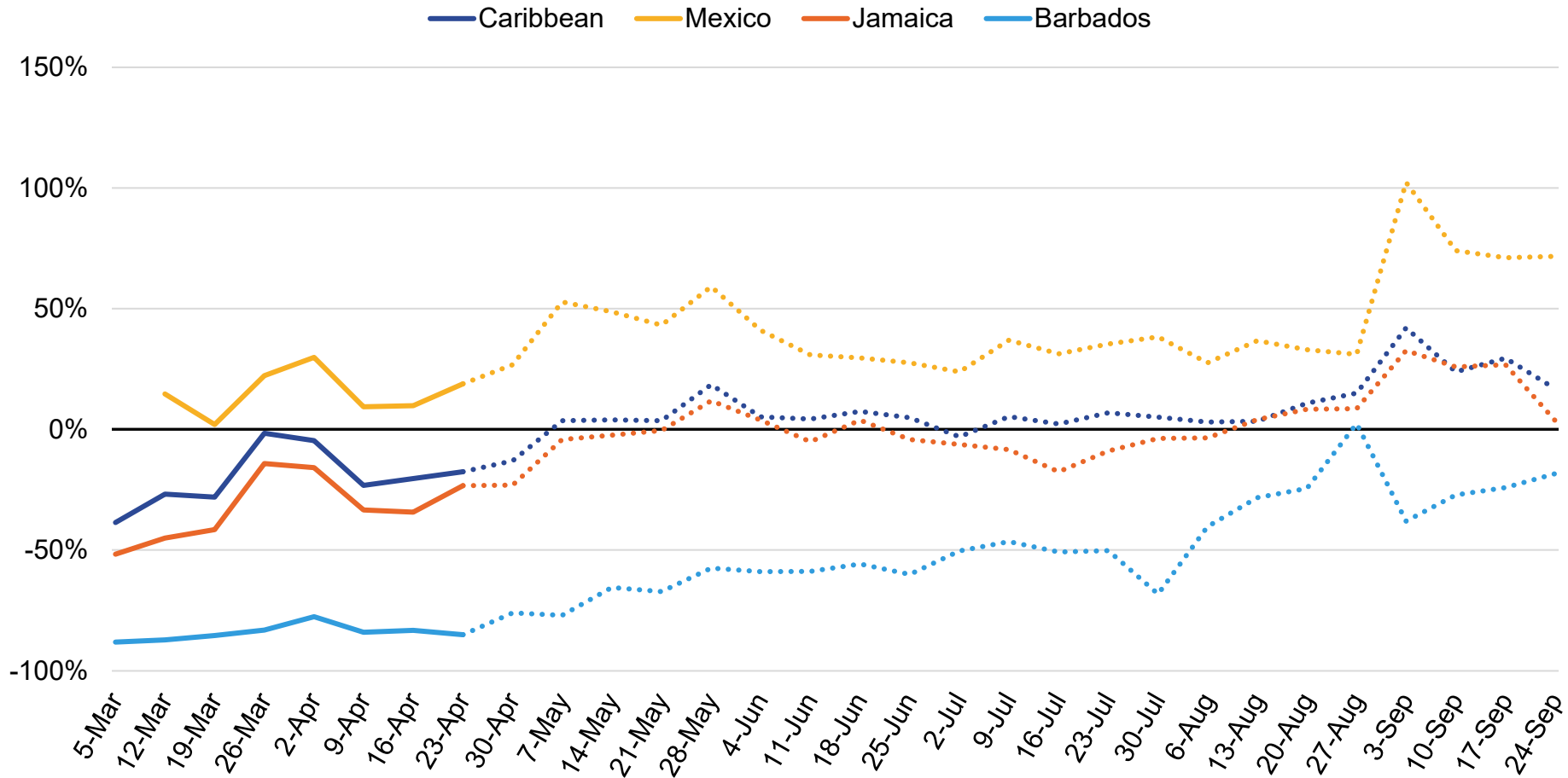
***Excluding domestic**


Issued tickets by key destinations





Confirmed tickets to key destinations

Tickets for USA travel between 01 Mar and 30 Sep vs same period 2019, with tickets up to 20 April 2021



 Arrivals from 1 Mar to 30 Sep 2021 vs same period 2019.

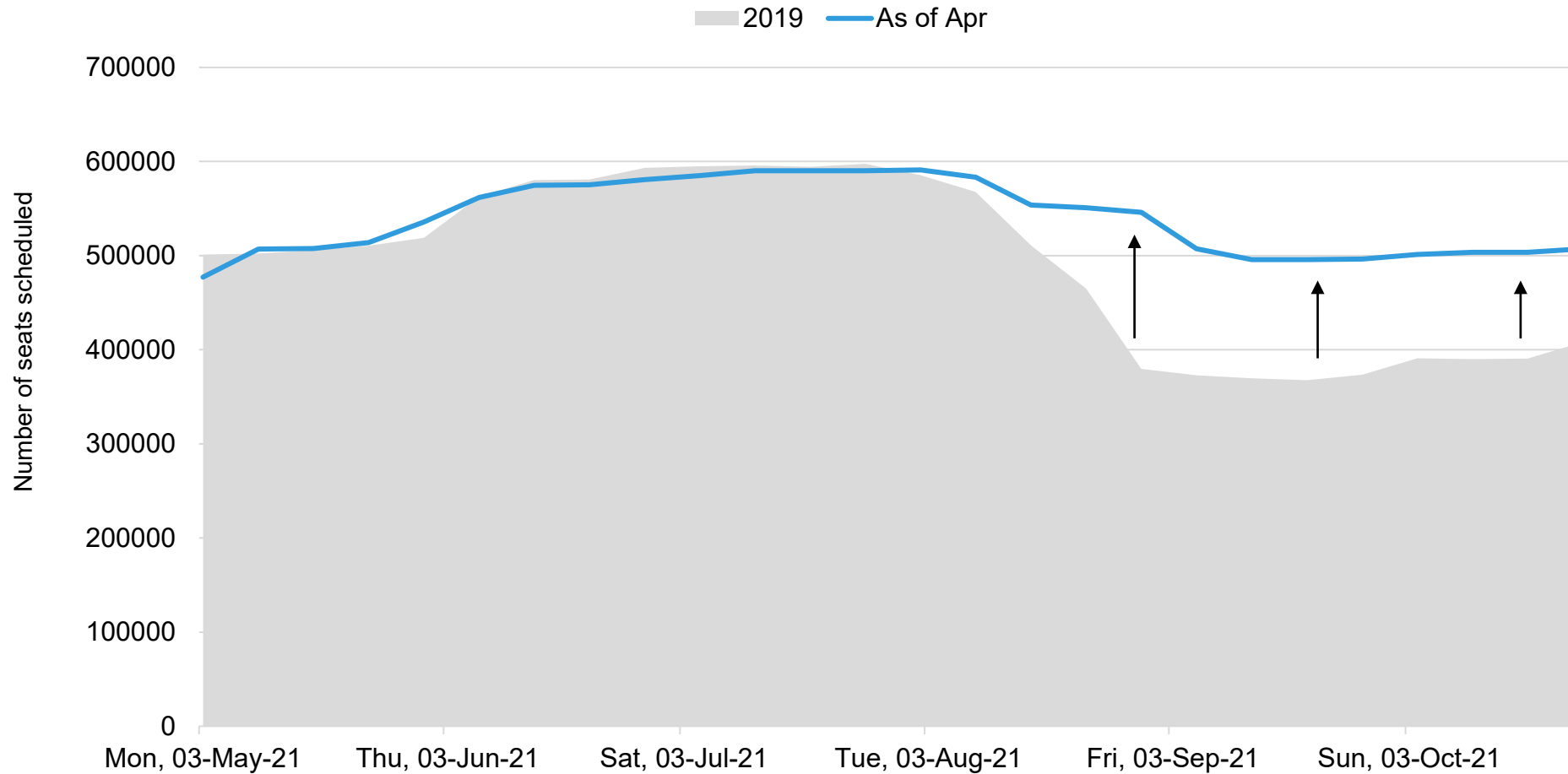
 Only considered pax staying 1 to 22 nights and more at destination.


 Source ForwardKeys Air Ticket Data.


***Excluding domestic**

Increased seat capacity for the end of the summer

Scheduled capacity from US to Caribbean as of April 2021



 Air Capacity for flights dates between 01 May and 31 Oct 2021, as scheduled on 19 Apr US departures to Caribbean + Riviera Maya.

 Source: ForwardKeys Seat Capacity.

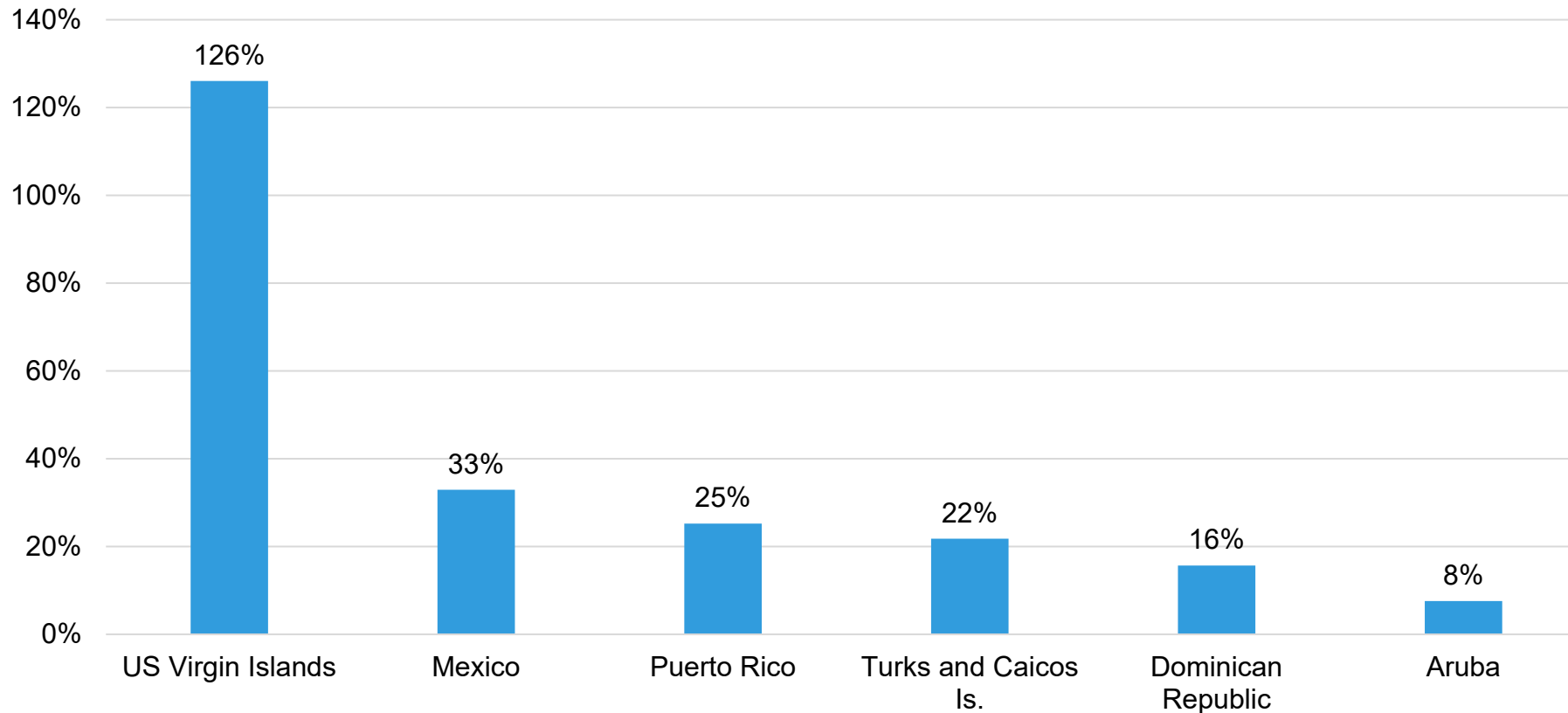
The air capacity seats are reported as per the data parameters listed above. They may differ due to the quick changing developments within the aviation sector, including unreported or unfiled seat numbers by airline operators.

Airlines place bets on US Virgin Islands



Seat Capacity increase for Caribbean destinations

% Increase vs same season 2019



Air Capacity for flights dates between 01 Apr and 30 Sep 2021, as scheduled on 19 Apr US departures to Caribbean + Riviera Maya.



Source: ForwardKeys Seat Capacity.

The air capacity seats are reported as per the data parameters listed above. They may differ due to the quick changing developments within the aviation sector, including unreported or unfilled seat numbers by airline operators.

Takeaways



ForwardKeys

1

Increased regional competition

2

Lots of opportunities from US travellers

3

Keep an eye on reopening key source markets beyond the USA

4

Air connectivity and more flights – more tourists,



Check out the latest analysis at www.forwardkeys.com | #ForwardKeys

CONNECT WITH ME ON

LinkedIn

Olivier Ponti

Vice-President Insights

 +34 658 80 06 24

 olivier.ponti@forwardkeys.com



Check out the latest analysis at
www.forwardkeys.com



Market Updates Presented by:



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



MARKET UPDATES FROM SOURCE MARKETS:

- 10:30 – 10:55AM ET: UK-IRELAND
- 11:00 – 11:25AM ET: USA
- 11:30AM – 12:00PM ET: ITALY/SPAIN/FRANCE



United Kingdom

Ready, Set, Go

State of the Market

The UK Government announcement back on Feb 22nd created a surge in activity and huge hope and excitement for the industry.

We expected an announcement on April 12th with a confirmation of the date for the resumption of international travel on May 17th.

However, that announcement didn't come and as a result sales have been fairly slow, especially for summer 2021.

We now expect that announcement around May 6th – 10th

State of the Economic Market

The governor of the Bank of England has said that Britain's economic prospects are improving as a result of the successful vaccine program and could perform more strongly than expected over the coming months.

Asked what sort of recovery the UK could expect, he said: "I'm now more positive, but with a large dose of caution." The huge success of the vaccine program meant the pandemic was now in retreat and output should return to its pre-pandemic level by the end of the year.

The economy managed to avoid a contraction in the fourth quarter of 2020 despite a lockdown taking place during part of the quarter. However, growth momentum eased in December with the economy contracting by 9.9% overall in 2020

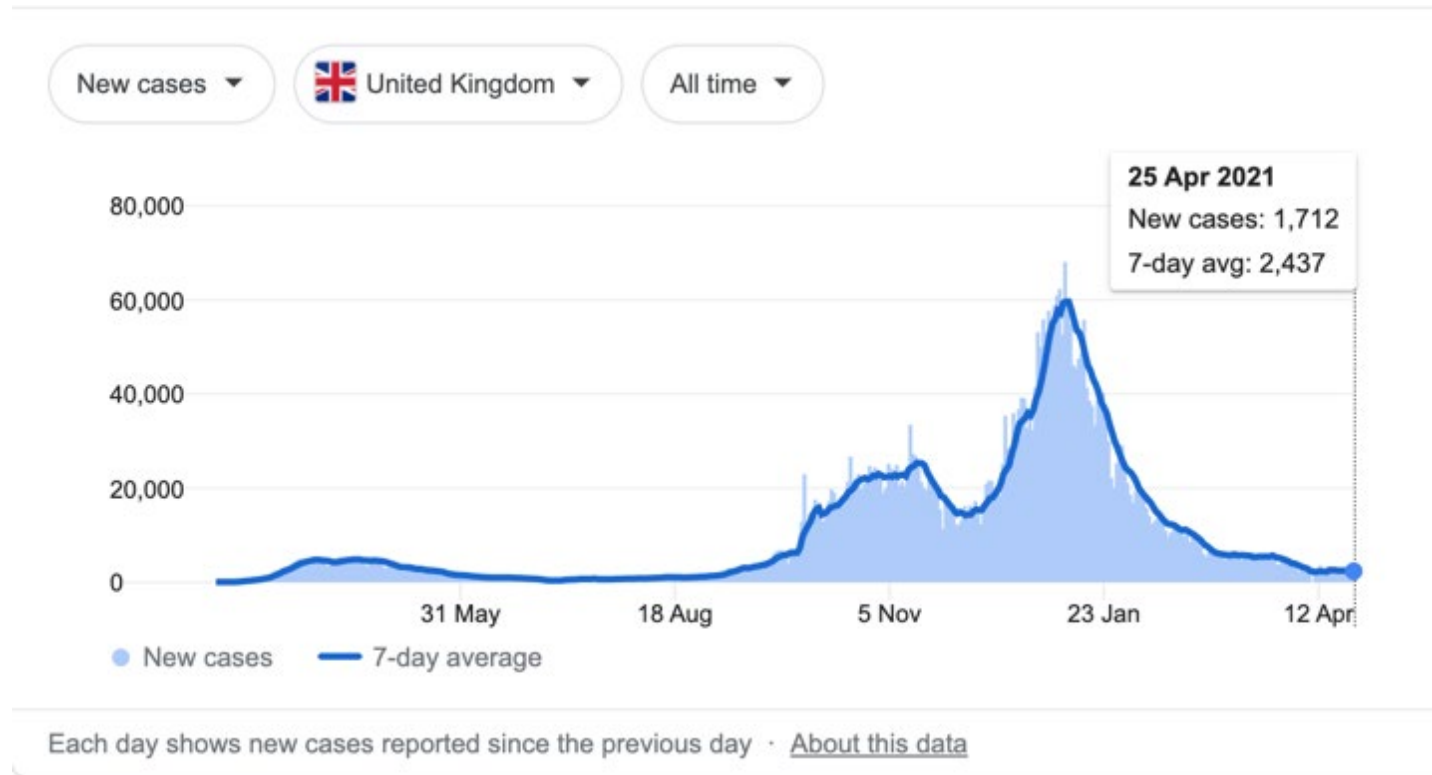
Table 6: KPMG forecasts for the UK

	2020	2021	2022
GDP	-9.9	4.6	5.6
Inflation	0.9	1.6	1.9
Unemployment rate	4.5	5.6	5.8

Source: ONS, KPMG forecasts. Average % change on previous calendar year except for unemployment rate, which is average annual rate. Inflation measure used is the CPI and the unemployment measure is LFS.

Status of Covid in the United Kingdom

New COVID Cases in the United Kingdom



New cases and deaths
continue to fall across the UK

United Kingdom Vaccine Roll Out – as of April 26th

People vaccinated

First dose total

33,666,638

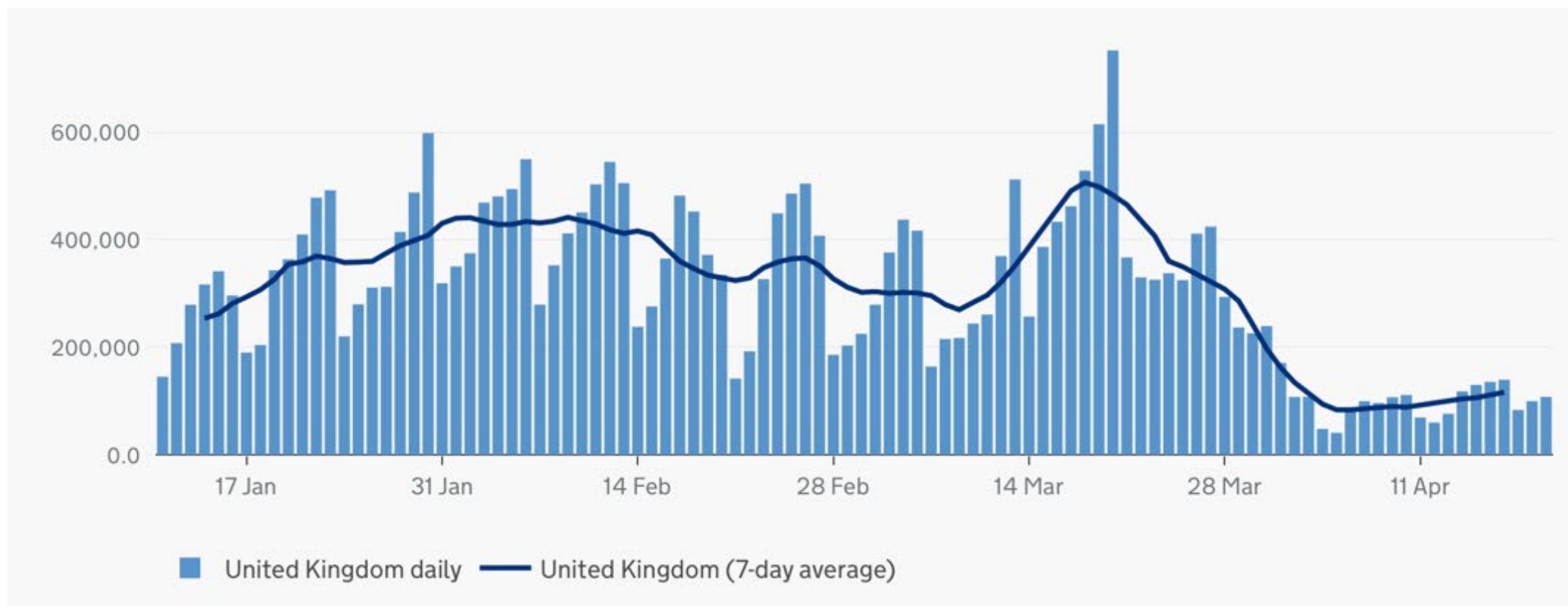
Second dose total

12,587,116

Vaccinations given

Total

46,253,754

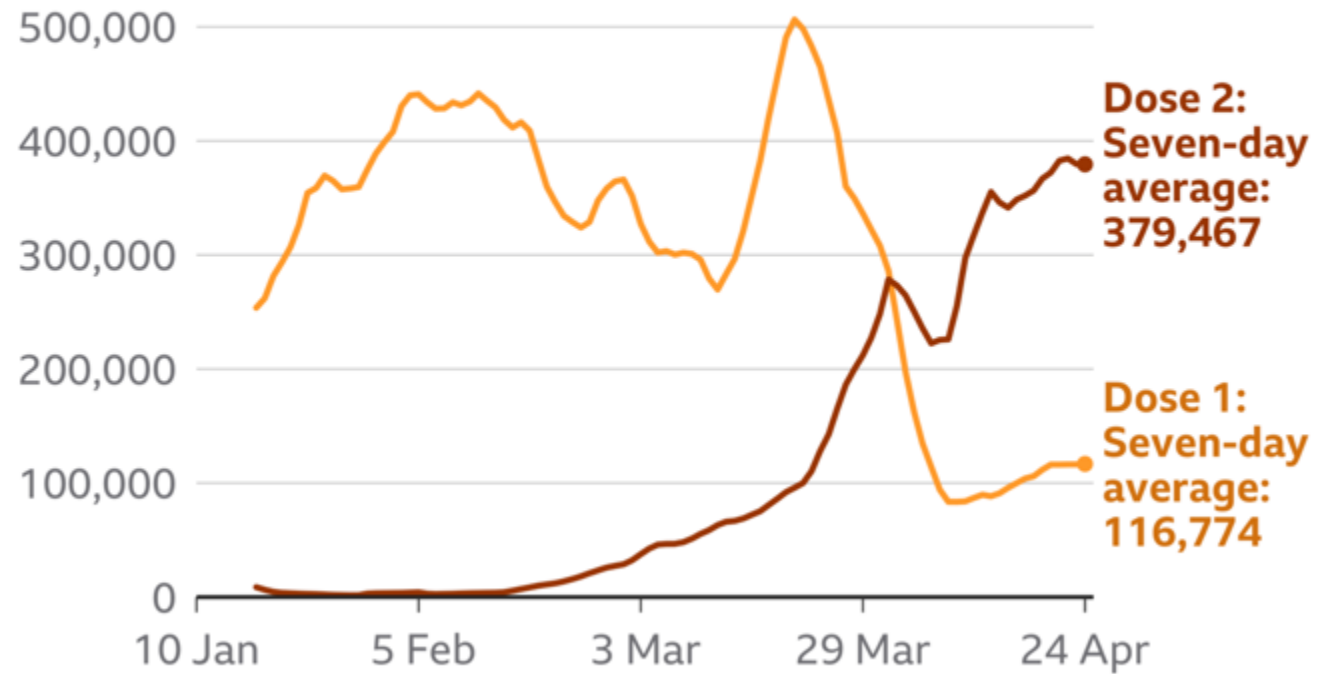


Data from: <https://coronavirus.data.gov.uk/details/vaccinations>

An average of about 379,000 second doses are now being given a day.

Focus shifts from first to second doses

Seven-day average of doses given



Source: Gov.uk dashboard. Data to 24 Apr

BBC

State of the Travel Market

Tour Operators - Trends for booking and travel

- Currently we are seeing bookings for Q3, Q4 into 2022 and in some cases even 2023 bookings
- Some operators have advised the odd client is taking a punt on this summer as they are worried that when the announcement comes availability might be gone
- It's expected that when the announcement finally comes, the lates market for this summer will be amazing – great opportunity for the Caribbean!
- Many operators are advising the greatest interest is for the 4-Star AI market
- The Villa market is also doing very well, people want their own pool if they need to quarantine
- Niche - The Weddings market is picking up and offers a wonderful opportunity



Consumer Priorities For Travel

- Where can we travel
- What are the entry protocols
- What is the flexibility in terms of cancellation due to COVID

Consumer priorities are made up of where we can travel to when the announcement is made, what the entry requirements are likely to be and what the cancellation policy is if travel is stopped due to COVID.

The Global Travel Taskforce is building recommendations to develop a framework for a safe and sustainable return to international travel.

Key dates for checkpoints to re-opening travel:

- May 17th
- June 28th
- July 31st
- Oct 1st

UK Government Traffic Light System

The four elements used by the government to identify these destinations will be:

- What is the level of infection?
- What is the level of vaccination?
- What is the level of Geno sequencing?
- How good is their data?

It's expected many Caribbean islands will be on the green list.

So far we have also received information that airlines will still look to fly to those destinations on the Amber lists.

At the same time the traffic light system is announced, we understand the Government will announce a COVID-19 charter, outlining consumer rights on travel. This will cover what happens if a country changes colour at short notice, and how they can claim a refund or re book.



Brits 'champing at the bit' to start holiday planning

by Phil Davies | Apr 26th 2021, 5:38



Almost half of people signed up to travel deals site Travelzoo say they are prepared to "go anywhere" just to get a holiday.

A further third want their post-lockdown travel to involve going somewhere really special or different.

Respondents to the travel outlook survey are fast becoming fully vaccinated with 30% saying they have had both jabs, and 92% having had at least one.



While 68% are ready to travel within the UK now, fewer than 40% are ready to travel internationally when allowed.

On average, they plan three domestic trips and one international trip in 2021.

As many as 58% would book a UK holiday for summer 2021 right now, while 39% would book a domestic break for the autumn or winter.

A poll of more than 2,000 Travelzoo members found that 46% would only pay up to £15 for a PCR Covid-19 test so they could travel abroad this year.

Just 28% would spend up to £25, while 19% would even pay up to £50 but just 7% would go beyond that so they could get abroad.

Gold standard PCR test costs currently start at around £60 and are seen as a major financial barrier for the restart in overseas family holidays in particular once the government's traffic light system for international travel is in place from May 17.

One in five (19%) of those polled think the government has let down the travel industry, with 49% saying they didn't know.

Travelzoo UK general manger James Clarke said: "It is with ever increasing anticipation that we await the outcome of where and when we can travel.

"Our members are champing at the bit to start planning their 2021 and 2022 travel and with so much talk of vaccine passports it's encouraging to see so many of them are partly or full vaccinated."

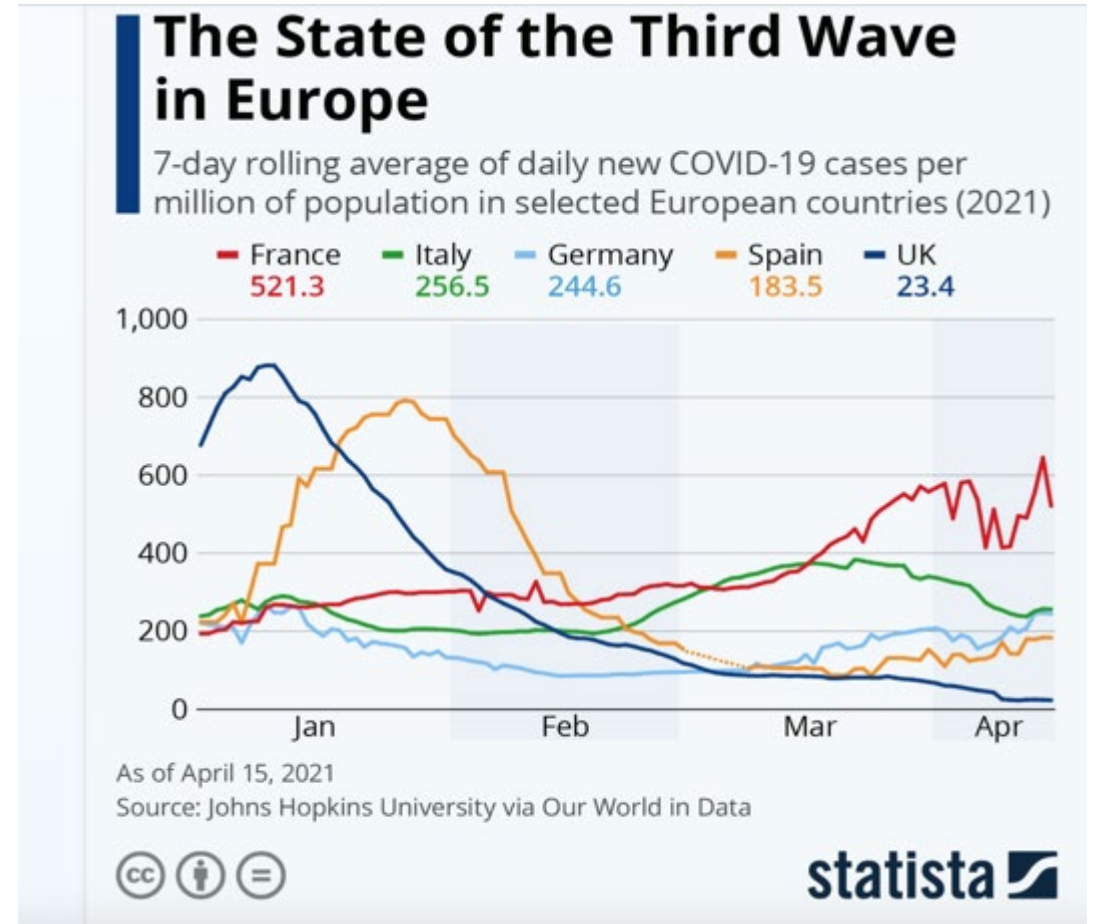
Favoured Worldwide Destinations - What's the Caribbean's Competition for 2021 travel?

Europe - Those destinations not on the red list will see traffic.

However back in Jan/Feb popular destinations in Europe were already close to being sold out as so many holidays had moved from summer 2020 into 2021.

With the new bookings which came in Q1, the flight prices are already in the region of £800 - £900 and many properties are sold out.

Plus, with the third wave across Europe we are already hearing from some operators, clients are looking to move to a different destination.



What's the Caribbean's Competition for Summer 2021 Continued,

With current PCR tests so expensive, the amount of testing required to enter and leave a destination can be a barrier, although the UK Government is working with airlines to reduce the costs. Another proposed solution is to start using the FOC home testing kits, which are now widely available, for the return test.

Destinations which continue to implement quarantine on arrival will also lose out to others who do not.

Other examples of the Caribbean's Competition are:

Maldives Entry Requirements

Travellers to Maldives who have completed their two doses of Covid-19 vaccination 2 weeks prior to travel are now exempted from the pre-arrival Negative PCR requirement and are not required to undergo or observe the travel quarantine on arrival to the Maldives.

Seychelles Entry Requirements

From 25 March 2021, Seychelles opened to all visitors irrespective of their vaccination status. This temporarily excludes visitors travelling from South Africa, who are not permitted to enter Seychelles until further notice.

Visitors from all other countries will be required to present a negative PCR test taken within 72 hours prior to departure and must stay at approved accommodation. There will be no quarantine requirement and no restriction on movement for visitors upon entry to Seychelles. Visitors must adhere to public health measures.

Action Plan - What should Caribbean Suppliers Be Doing

Keep up your presence in the market

Travel Agents are still really engaged and keen to learn, hear about all you updates and attend virtual webinars to see your product. They are really missing you!

Tour Operators – Many operators are looking to run May Campaigns and expect to see a huge lates market for this summer so work closely with your trade partners.

New Opportunities – We see more new operators, who traditionally sold other destinations, looking for new product they can sell to clients ready to travel now. This is the time to widen your net.

Thank You



BRITISH AIRWAYS
Holidays

Paradise
PROMOTIONS
• Saint Lucia • Barbados • St. Kitts • Dominica



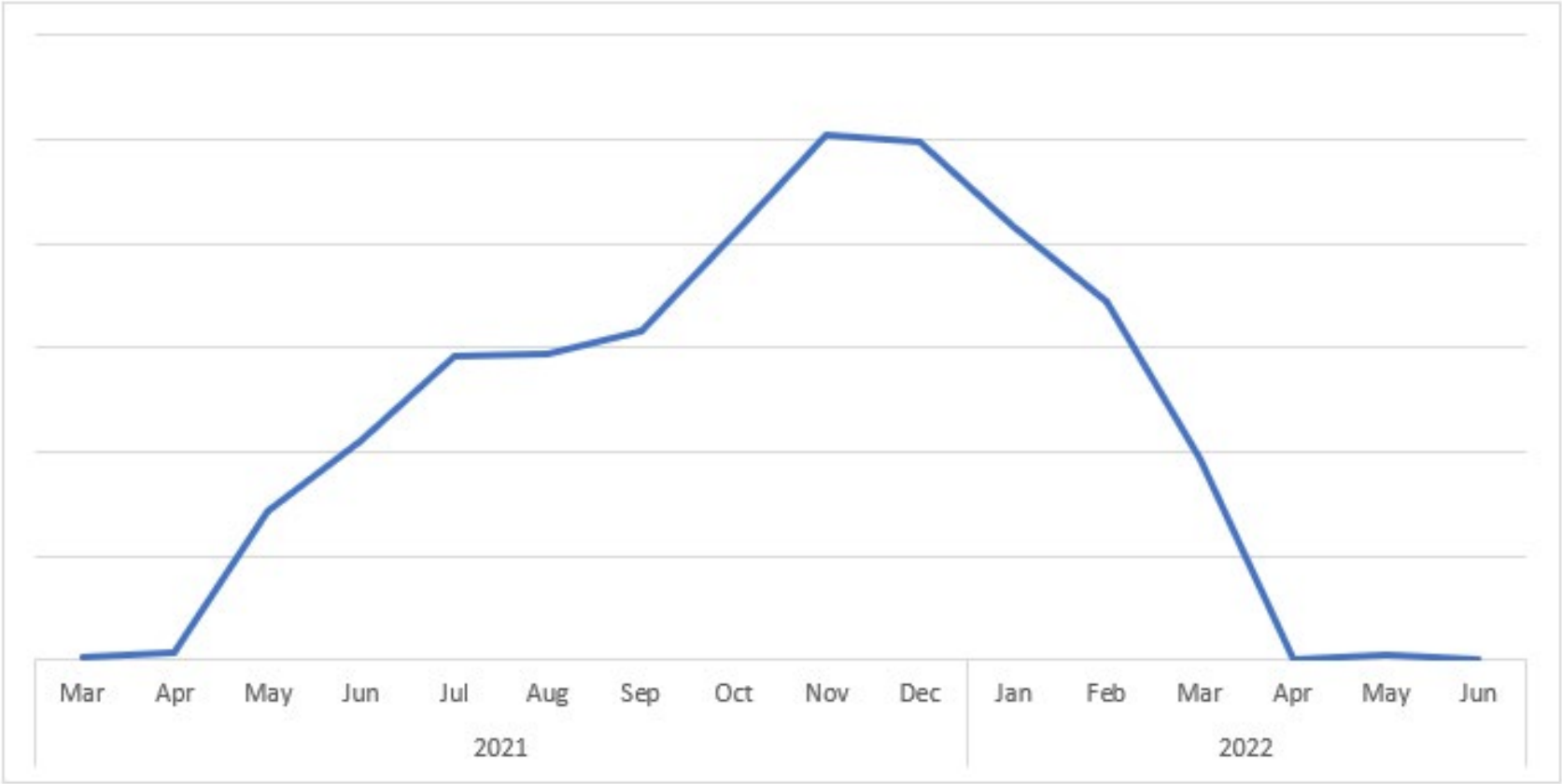
BRITISH AIRWAYS

Holidays

Spikes in demand driven by re-emergence out of lockdown and sale activity



Q4 has been the most booked for Caribbean region over the last 8 weeks



Other demands that we are seeing in the market

- Caribbean currently accounting for 40% of sales vs 29% in normal year
- Driven by other destinations being closed (Asia/Africa)
- Announcement in May is key and will drive late business but could come with risk to Caribbean region
- Higher spend driven by compelling pricing; upgraded room types, more inclusive meal plans, etc

Flexible flying program driven by demand in the market



- Ability to react quickly to consumer demands in terms of flight capacity
- Aircraft & crew are available for us to increase where needed
- Maldives is an example of how this has worked well
 - Added to the Travel Corridor list on Thursday 22nd Oct
 - By Monday 26th Oct all seats for Q4 had been sold
 - By Wednesday 28th Oct additional Winter & Festive services had been added to the program



Our Customer Promise

At British Airways Holidays we always set high standards for safety, flexibility and the service we provide our customers.

Our Customer Promise is our no nonsense commitment to give you complete peace of mind for both booking and taking your holiday.



Flexibility to change or cancel

Change your booking for free or cancel it for voucher credit, simply give us 3 weeks' notice. Available on all holidays booked for travel before 30 April 2022.

[Find out more](#)



Book now, pay later

Secure your holiday with a deposit from just £75 per person and pay off the balance in instalments. Best of all, your final payment isn't due until 3 weeks before your holiday begins.

[Find out more](#)



Refunds without delay

If we cannot fulfil your holiday, we're committed to ensuring you receive a full refund within 14 days. According to Reevoo verified reviews, our customers have rated us 9/10 for the speed in which we processed their refund.



Committed to your safety

You'll see changes at every step of the journey when you fly with us. We've also introduced new hotel and car hire safety measures to ensure you can enjoy your holiday safely.

[Find out more](#)



Here when you need us

We have a 24-hour holiday helpline for any issues whilst you're away, and if your plans change or the unexpected happens, we will prioritise getting you home as soon as possible.



Protecting you and your money

All our holidays are ATOL protected, meaning your money is safe and you won't be stranded abroad, giving complete peace of mind.

[Find out more](#)



Thank you!

Mark Tanner
Senior Destination Manager
British Airways Holidays

mark.tanner@holidays.ba.com

ID TRAVEL GROUP



ID^x

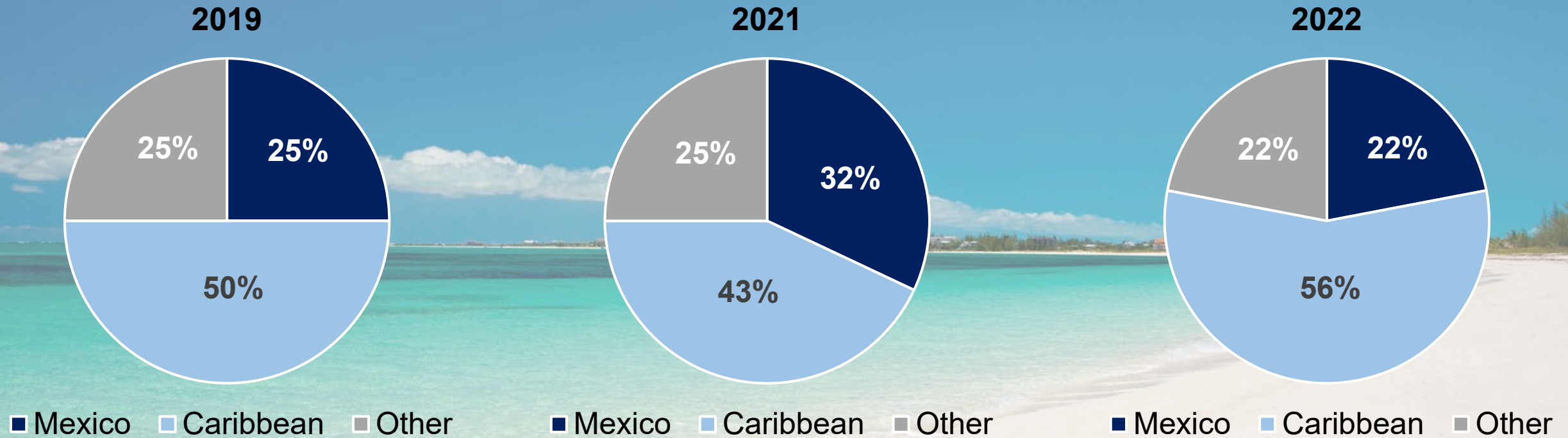
The Authority for Luxury Travel®

The Power of Travel



Laurie Palumbo
Chief Operating Officer
ID Travel Group

ID TRAVEL GROUP - BUSINESS OVERVIEW:



2019 – Caribbean had the biggest share

2021 – Caribbean lost share to Mexico who had open borders and relaxed entry policies

2022 – Mexico drops a bit while Caribbean is picking up share

THE ID INSIGHT:

Current Trends:

- Caribbean is the place to be right now!
- Proximity, EU summer travel limitations, cruises not operating – Caribbean gaining share
- Based on current ID trends, providing virus stays in control, we should be seeing bonanza levels – 2019 and beyond!

General State of USA:

- Pent up demand is strong, clients are yearning to travel and we are seeing volume increase as more travelers become vaccinated
- Marketplace confusion in Caribbean: mixed messages and policies/protocols continuously changing
- Safety remains paramount, ease of entry and testing availability/requirements are key

CARIBBEAN – A GLOBAL BRAND:

- **Celebrate diversity! “We’ve got it....”**
 - Historical towns, shopping, cuisine, beaches, mountains, volcanos, hiking, biking, sailing, fishing, golf, casino, private villas, hotels, inns, spa/wellness...
- **Market accessibility:** short flight times, abundances of air lift and excess planes
- **Simplify and standardize protocols** to eliminate confusion for advisors and clients

IATA Travel Pass - 29 airlines in pilot testing!



Thank you!

ID TRAVEL GROUP



The Authority for Luxury Travel®

ID^x

The Power of Travel

Anguilla · Antigua · Aruba · Barbados · BVI - Virgin Gorda · Curaçao · Dominica · Dominican Republic · Grand Cayman
Grenada · Grenadines - Canouan · Grenadines - Mustique · Grenadines - Palm Island · Jamaica · Nevis · Puerto Rico · St. Barthélemy
St. Kitts · St. Lucia · St. Martin · St. Vincent · Turks & Caicos · USVI - St. Thomas



STATE OF THE US TRAVEL MARKET

**DONNA
MICHAELS**

**SR. PRODUCT
MANAGER
VACATION
EXPRESS**

MAY TO OCTOBER 2021



Traveler Concerns

- Understanding Protocols
- Spread of COVID & Medical Facilities
- Is My Money Safe?

OCTOBER 2021 TO APRIL 22

Favored Destinations Worldwide

- Sunny Destinations
 - Mexico
 - Caribbean/The Bahamas
 - Domestic: Hawaii, Florida



An aerial photograph of a crowded beach. The top half of the image shows clear, turquoise water with several people swimming. The bottom half shows a sandy beach crowded with people sunbathing. Many people are lying on towels or blankets, and several large, light-colored beach umbrellas are open. A rainbow flag is visible on the beach. The overall scene is bright and sunny, suggesting a summer day.

THREE KEY OPPORTUNITIES

1. Communication
2. Communication
3. Communication



THANK YOU!

**DONNA
MICHAELS**

**SR. PRODUCT
MANAGER
VACATION
EXPRESS**

CHTA MARKET UPDATES: SPAIN

30 April 2021





CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



1. Situation of the Spanish tourism market

- a. State of the Travel market (Spain) - May to October, 2021
- b. State of the Travel market (Spain) - October 21 to April 2022
- c. Overall key highlights and opportunities for the Caribbean resort operators
- d. What can we do to establish the Caribbean as a more defined global brand



State of the Travel market (Spain) - May to October, 2021

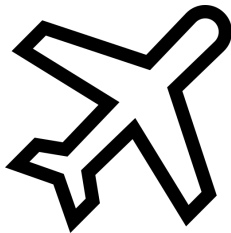
Status of Covid in Spain

- Spain has registered **3,4 million cases of Coronavirus** and more than **77.000 people have died**. Fourth wave seems to be under control.
- Spaniards are allowed to travel abroad.
- As of 23 April, **Spain has the 8% of its population fully vaccinated**.
- On 19 May **Fitur, Europe's third most important tourism trade show, will take place in Madrid**. This will be the first presential tourism trade show in Europe post pandemic. The Spanish government has committed repeatedly to make whatever it takes to enable the celebration of this event.

State of the Travel market (Spain) - May to October, 2021



MAIN CONCERNS



- **Vaccination passport** has wide support in Spain
- **67% is willing to travel but:**
 - A 54% of the Spaniards only will travel to destination that has started to vaccinate their citizens.
 - Also, a 56% admits that will wait to be fully vaccinated.
 - This figure rises to 70% for those would-be travellers older than 55 years old.
- In terms of the willingness of **traveling by plane**, a **68% of the Spaniards are more concerned about the possibility to get infected** in a plane than about the environmental impact that supposes catching a plane.

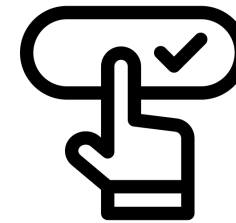


State of the Travel market (Spain) - October 21 to April 2022

Consumer priorities for travel



**HYGIENE AND
SECURITY**



**BOOKING
FLEXIBILITY**



State of the Travel market (Spain) - October 21 to April 2022

Consumer priorities for travel



**DOMESTIC
TRAVELS**



**NATURE AND
RURAL
GETAWAYS**



State of the Travel market (Spain) - October 21 to April 2022

Consumer priorities for travel



**SUSTAINABLE
TOURISM**



**MORE
DEMANDING
CLIENTS**



State of the Travel market (Spain) - May to October, 2021

- Favoured destinations:

- **Tier 1:** National destinations



- **Tier 2:** Italy, France and Portugal.

- **Tier 3:** Germany, **CARIBBEAN**, UK, USA and Greece



Situation of the Spanish tourism market




CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Overall key highlights






9 Días

Punta Cana


desde **817€**



9 Días

La Habana

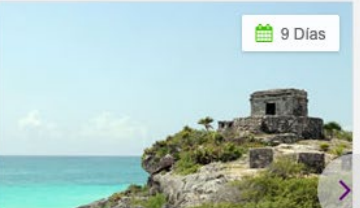
desde **1037€**



9 Días

Varadero

desde **851€**



9 Días

Riviera Maya

desde **976€**



Riviera Maya
Hotel Riu Lupita ★★★★★

Vuelos desde Madrid
8 días / 7 noches ⓘ
Todo incluido

Seguro de Viaje Incluido

VUELO + HOTEL desde **1.014€**

CON COCHE +63€

CON TRASLADOS +30€

Punta Cana
Whala!Bávaro ★★★★★

Vuelos desde Madrid
8 días / 7 noches ⓘ
Todo incluido

Seguro de Viaje Incluido

VUELO + HOTEL desde 951€ **924€**

CON COCHE +108€

CON TRASLADOS +15€

Cancún
Hotel Nyx Cancun ★★★★★

Vuelos desde Madrid
8 días / 7 noches ⓘ
Todo incluido

Seguro de Viaje Incluido

VUELO + HOTEL desde **1.012€**

CON COCHE +62€

CON TRASLADOS +10€

La Habana
Atlantico ★★★

Vuelos desde Madrid
8 días / 7 noches ⓘ
Todo incluido

Seguro de Viaje Incluido

VUELO + HOTEL desde **839€**

CON COCHE +428€

CON TRASLADOS +28€

La Romana - Bayahibe
Whala!Bayahibe ★★★★★

Vuelos desde Madrid
8 días / 7 noches ⓘ
Todo incluido

Seguro de Viaje Incluido

VUELO + HOTEL desde 865€ **837€**

CON TRASLADOS +30€



Situation of the Spanish tourism market

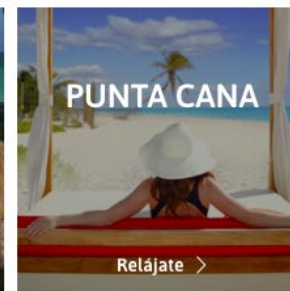
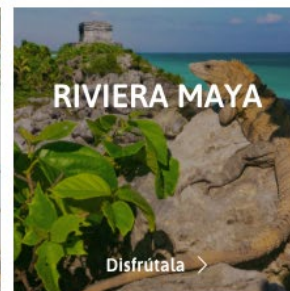
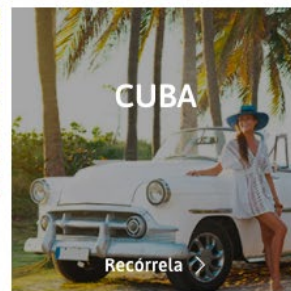


CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



Overall key highlights

VIAJES *El Corte Inglés*



Carrefour
viajes



 **ALFABÉTICO**
GLOBAL COMMUNICATION

 **Promotourist**
TOURISM COMMUNICATION



Overall key highlights

1. The Caribbean represents for Spaniards the **dream destination**.
1. The Spanish-speaking Caribbean has been **very popular** for different reasons:
 - Cultural and idiomatic links
 - Huge traction of some countries such as Dominican Republic and Cuba
 - non-Spanish Caribbean is less known
1. **Asia in the map**: new competition.
1. Spain has also a **high-standing** type of traveler that needs to be reached out.



What can we do to establish the Caribbean as a more defined global brand

1. Run an Spanish and European omnichannel **PR campaign** to reach out B2B and B2C.
1. Increase **brand awareness** of the entire Caribbean destinations
1. Promote the **easiness** to get to the other Caribbean: Miami or New York as a hub.
1. Increase **direct flights** from Spain
1. Showcase the Caribbean **safe, clean and trustworthy destination covid-wise...** more than Asian ones.

Thanks for your attention

ENRIC TOMAS

PR DIRECTOR

+34 681 113 032

etomas@alfabetiko.com

promotourist.com | alfabetiko.com





OVERVIEW OF THE FRENCH MARKET

CARIBBEAN MARKETPLACE 2021

EXPRESSION
GROUP

APRIL 30 2021



TRAVEL LIFESTYLE
NETWORK

Current situation in France



SANITARY

RESTRICTIONS
TO BE LIFTED
MAY, 3RD

+20%
VACCINATED
ADULTS

EUROPEAN IMMUNITY
MID-JULY

ECONOMY

+200 BIL. €
FRENCH SAVINGS
IN 2020

EXTENDED SUPPORT
TO TOURISM
INDUSTRY

+5,5%
GROWTH PLANNED
FOR 2021

TRAVEL RESTRICTIONS

TRAVEL ABROAD
IS NOT ALLOWED

PCR TESTS
QUARANTINE

EUROPEAN
DESTINATIONS

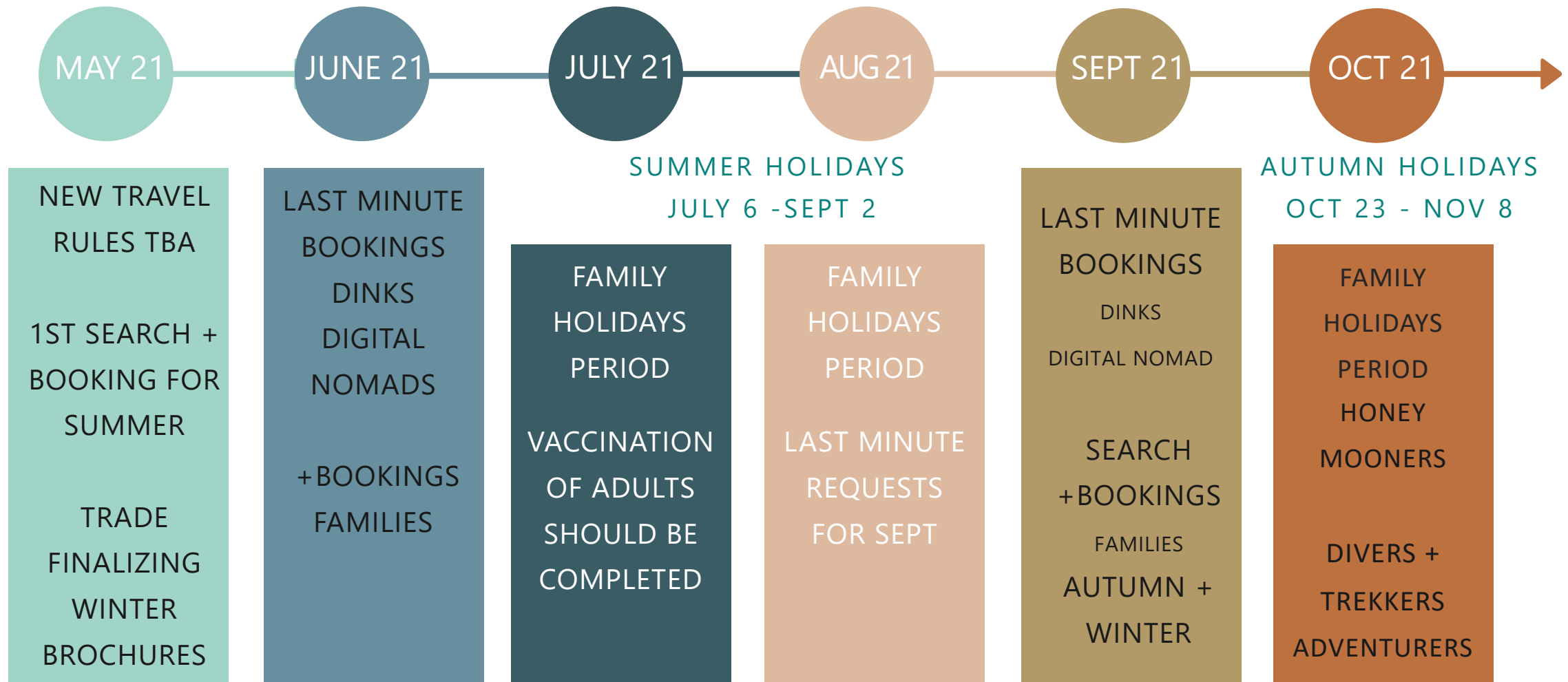
TRAVEL INDUSTRY

MERGERS
LAYOFFS

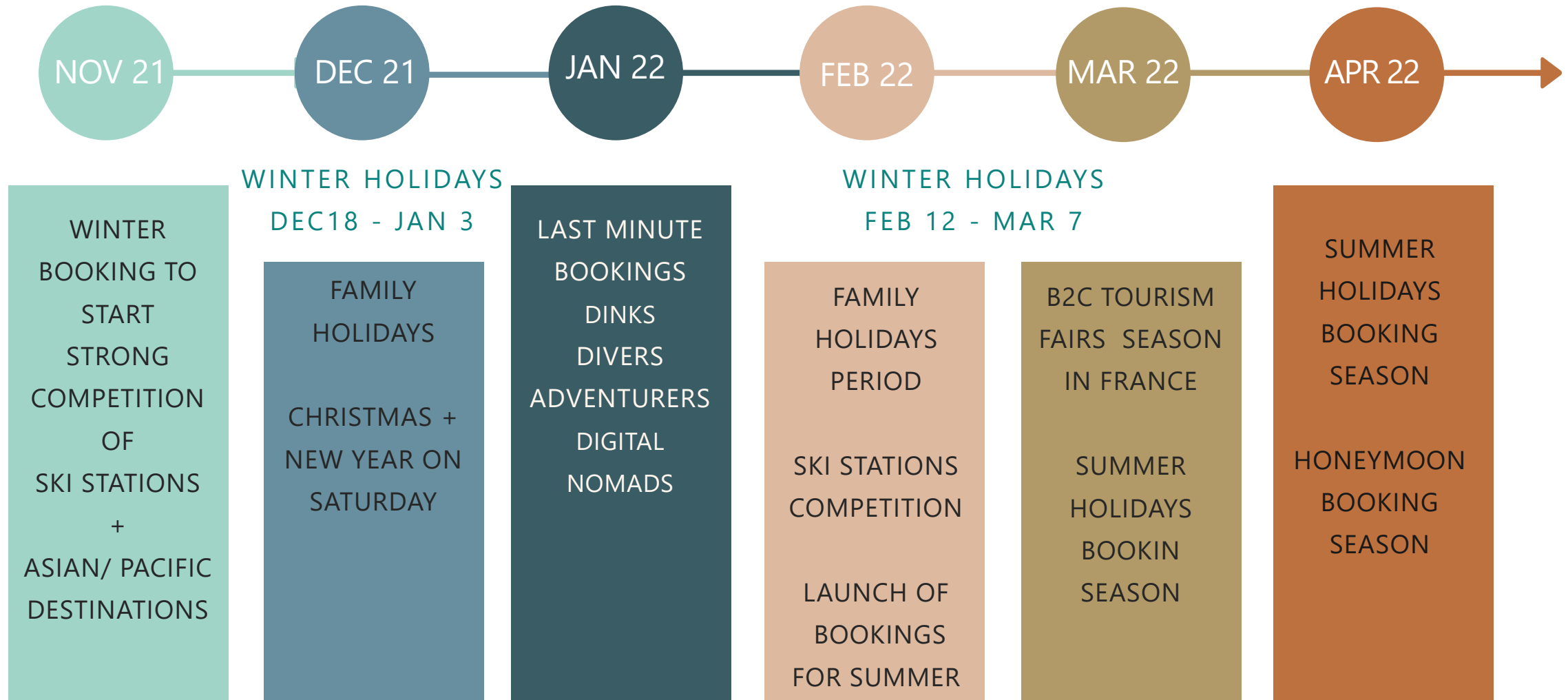
NEW OFFERS

FLIGHT SCHEDULE
CONFIRMED FOR
SUMMER

Travel trends - May to October 2021



Travel trends - Nov 2021 - April 2022





Consumer priorities for travel

57% OF FRENCH PEOPLE CONSIDER TRAVEL IS VITAL

- **TRAVEL** as soon as possible
- In **FRANCE**, but not only
- **NATURE** is calling
- **SANITARY** protocols are a priority
- **WIRELESS** services are appreciated
- Assistance of a **TRAVEL AGENT** is required
- **FLEXIBILITY** is mandatory
- **LAST MINUTE** bookings will be the rule
- **GREEN** travel must be valued
- Number of **DIGITAL NOMADS** will grow



Favoured worldwide destinations



SUMMER 2021

1.FRENCH POLYNESIA

2.COSTA RICA

3.SOUTH AFRICA

4.NAMIBIA

5.THAILAND

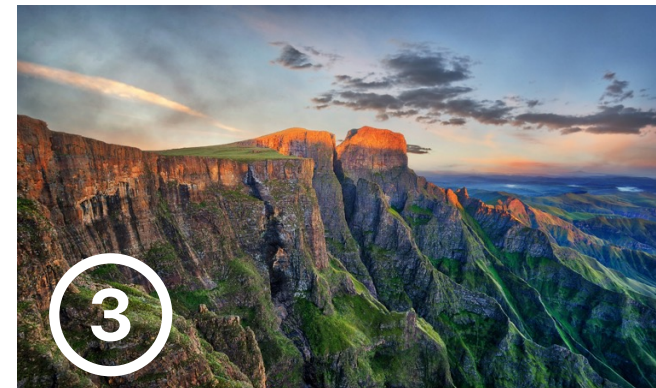
6.USA

7.AUSTRALIA

8.CAMBODGE

9. KENYA

10. CANADA



Key highlights & opportunities for the Caribbean



- ① EASY ACCESS FROM FRANCE + EUROPE
- ② ALL TOURISM ASSETS - POST COVID
- ③ FRENCH SPEAKING ISLANDS / AMBASSADORS
- ④ COMBINED OFFERS & PACKAGES



One European Global Campaign

#CaribbeanMood



1

MUTUALIZE PROMOTIONAL RESOURCES

PROTOCOLS + OFFERS + TESTIMONIALS

2

USE ALL CHANNELS AVAILABLE

B2B + B2C + MEDIA + INFLUENCE + OPINION LEADERS

3

LAUNCH A GLOBAL EUROPEAN CAMPAIGN

ONE MESSAGE - ONE VOICE - ONE REGION



Thank you



CONTACTS

Stéphanie Picon, Managing Director | Virginie Le Norgant, Associate Director
contact@groupeexpression.fr

Tel. +33 (0)1 42 66 12 96
www.groupeexpression.fr

EXPRESSION
G R O U P E



TRAVEL LIFESTYLE
NETWORK