Caribbean Tourism Pulse
Presented by:

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Today's Agenda

Tourism Pulse Topics & Speakers:

9:00 - 10:30AM ET

- **Traveler Insights –** Chris Davidson, Executive Vice President, MMGY Global
- **Spending Insights –** Andreas Spycher, Principal, MasterCard Data and Services; David Klippenstein, Senior Managing Consultant, MasterCard
- **US and Canadian Traveler Insights –** Gabe Saglie, Senior Editor, Travelzoo

Market Updates from Source Markets:

- 10:30 – 10:55AM ET: **Central-Latin America**
- 11:00 – 11:25AM ET**: BeneLux/Germany/Swiss**
- 11:30AM – 12:00PM ET**: Canada**

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Pulse Check on Travel Recovery

CARIBBEAN™

DAVID KLIPPENSTEIN

ANDREAS SPYCHER

mastercard.

Introduction

Vaccine & Herd immunity: expected by end 2021. Achieving herd immunity is key to restoring both domestic demand and broader travel demand. Countries who have vaccine passport programs are likelier to establish quarantine-free travel corridors.

Domestic recovery outpaces international travel: in North America, domestic air travel is positioned to recover by 2022 and international air travel by 2024 with risks skewed towards a quicker recovery.

Leisure travelers lead the recovery: consumers are returning to travel faster than companies. In 2021, consumers are tracking 71% of where they were in Q4'19; companies at 33%, partially driven by stickiness of work from home.

Market Outlook: Travel recovery is emerging in the US with restrictions easing and a large amount of consumer purchasing power boosted by stimulus payments (Estimates have a family of 4 collecting upwards of $14,000 over the next 5 months). Strong end to Q1 – watch for a good start to Q2 in Retail and Travel bookings being to recover.

Covid-19 Outlook: Thresholds for herd immunity vary, but 70% seems to be common ballpark. Be prepared to live with Covid-19 variants for a while… snap shut-downs and shifting restrictions will be the normal for 2021/22.

2021 Travel Recovery - Trends

Consumer behavior is driven by:

- Rise of Activities
- Betterment Boom
- New Work-Life-Play

How is this impacting travel spend recovery in 2021?

1. **Shock to Loyalty**
   Massive Loyalty “Member-Reset”
2. **The Rise of Revenge Spend**
   “unattainable effect”
3. **Limited Business Travel**
   “Essential” and SME driven
4. **Attractiveness of Destinations**
   “outdoor and rejuvenating”
5. **Neighboring and Regional Destinations**
   Long-haul supply “shortage”

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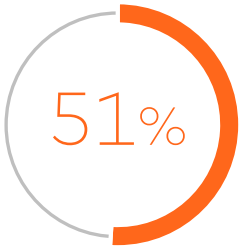
Loyalty Sentiment – Leisure drives the Recovery - The “Bottom” is the New “Top”

The pandemic has become a catalyst for travelers to reevaluate their providers. Low tier members are looking for options to earn and be rewarded better. COVID19 poses a challenge to the fidelity of higher-status members.

Ease of Earning Rewards

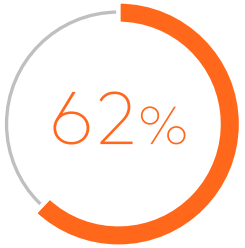
Less than a third of low status member find it easy to earn rewards

Willingness to shift Loyalty



51% of mid-tier members are open to try new programs

Value for Money vs Loyalty



62%* of tiered loyalty members seek value for money over the brand or the loyalty programs rewards

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Source: Mastercard Analytics / Proprietary and Confidential

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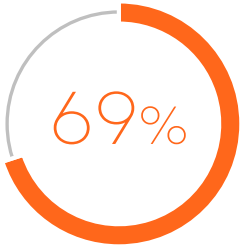
Consumers are gearing up for a splurge

Consumer's households have run up all-time record-high savings – an estimated $1.5 trillion more in savings than they otherwise would have had. Millennials (77%) were especially likely to be planning a post-COVID splurge.

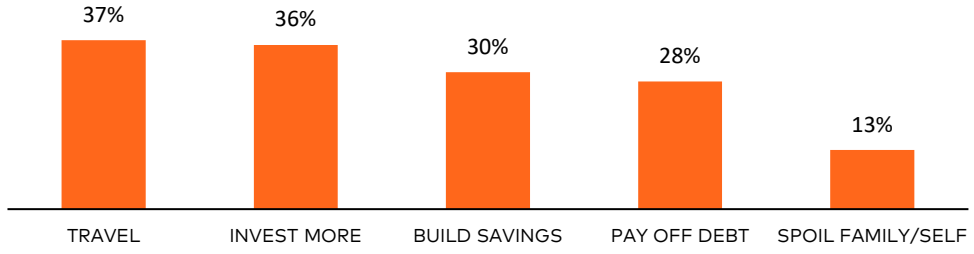


Are planning on at least one post-COVID splurge purchase

Are looking forward to buying something just for me, to 'treat myself' when this is over

Rebound in spending

However, economists expect some amount of caution in spending, with affluent consumers putting some of their money into investments.



Spending Intentions for Pandemic Savings
- Affluent -

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Source: Mastercard Analytics / Proprietary and Confidential

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Consumers are gearing up for a splurge

The USA consumer discretionary spending is outlining the positive sentiment for exiting the lock-downs and post-pandemic recovery. While the accommodations still lack the international tourism, other categories are outperforming versus previous year (QoQ)

Sporting Goods

2021 versus 2020 Growth

Eating Out

2021 versus 2020 Growth

Accommodation

2021 versus 2020 Growth

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Source: Mastercard Analytics / Proprietary and Confidential

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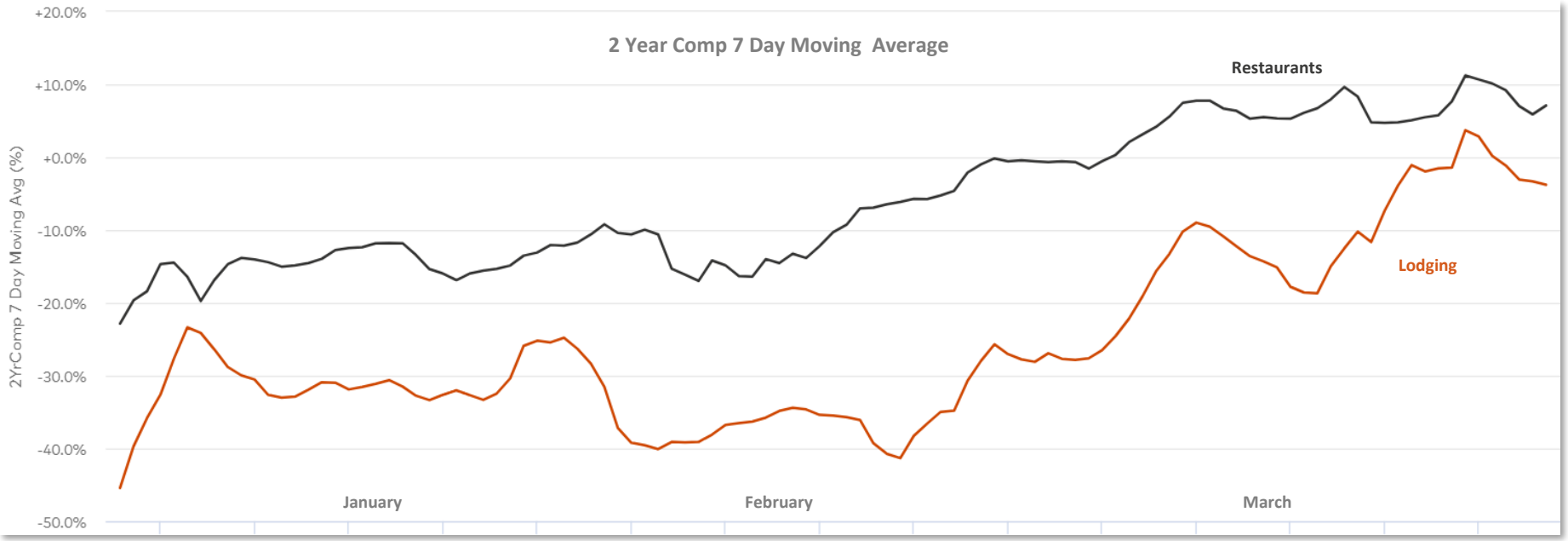
Travel Recovery Outlook – F&B as a leading Indicator for Consumer Confidence

Eating out spend is a powerful card present indicator to monitor consumer confidence to venture out and spend out of home beyond essentials.



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Source: Mastercard Analytics / Proprietary and Confidential

Carribean Tourism Recovery - Positive Trends shaping 2021

In 2020 all consumers have shifted their behavior significantly.

Remember

82%	Have picked up / accelerated **new hobbies**
73%	Say Covid has **changed** the way they shop
54%	Intend to travel **domestically** within **six months**
57%	Feel at ease to travel **internationally** within **12 months**

Target

67%	Have **saved money** for travel
35%	GenZ & Millennials spend more on **wellness activities**
80%	Choose travel now to **rejuvenate and recharge**
24%	Search for **more information** about a destination, safety and activities

Source: Mastercard Analytics / Proprietary and Confidential

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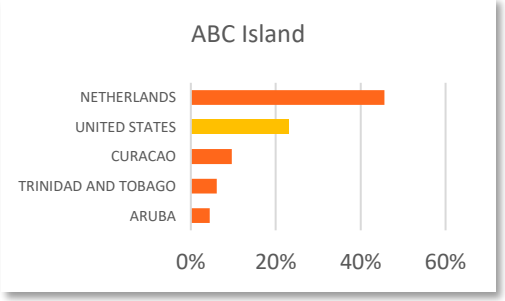
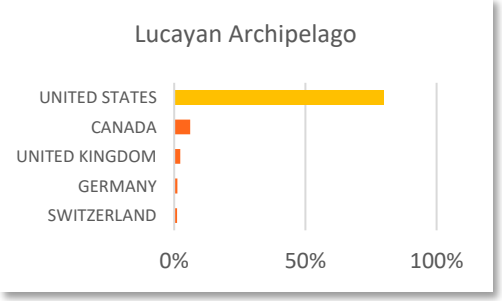
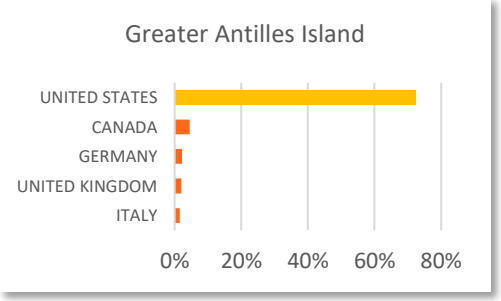
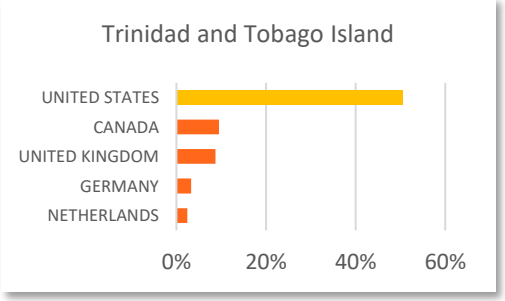
Carribean Tourism Recovery – a regional refocus

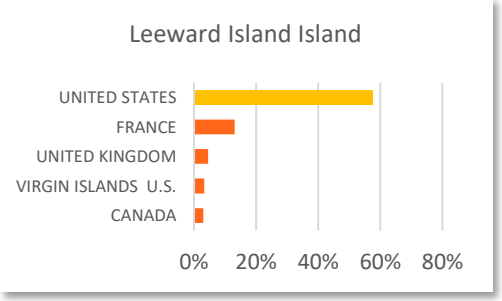
With the fast-recovering USA domestic travel market and the positive spending outlook the pre-Covid dependancy on the USA market is now a benefit for a recovery of all island groups. While the European traffic will lag a refocus on the nearby Latin American markets can help to fill the gaps.

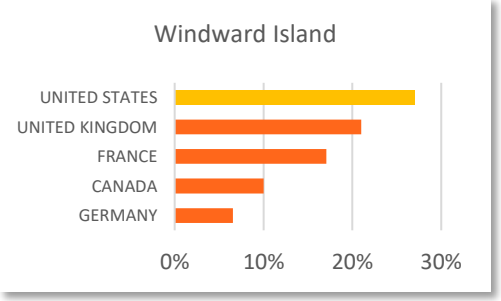












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Source: Mastercard Analytics / Proprietary and Confidential

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Caribbean Travel Outlook

May 3, 2021

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What is Travelzoo?

TRUSTED GLOBAL INFLUENCER

Publishing travel, hotel, and local content for 20+ years

PROVEN PRODUCT LINE

Storytelling and performance-driven products that drive results

LARGE AUDIENCE

30M members worldwide

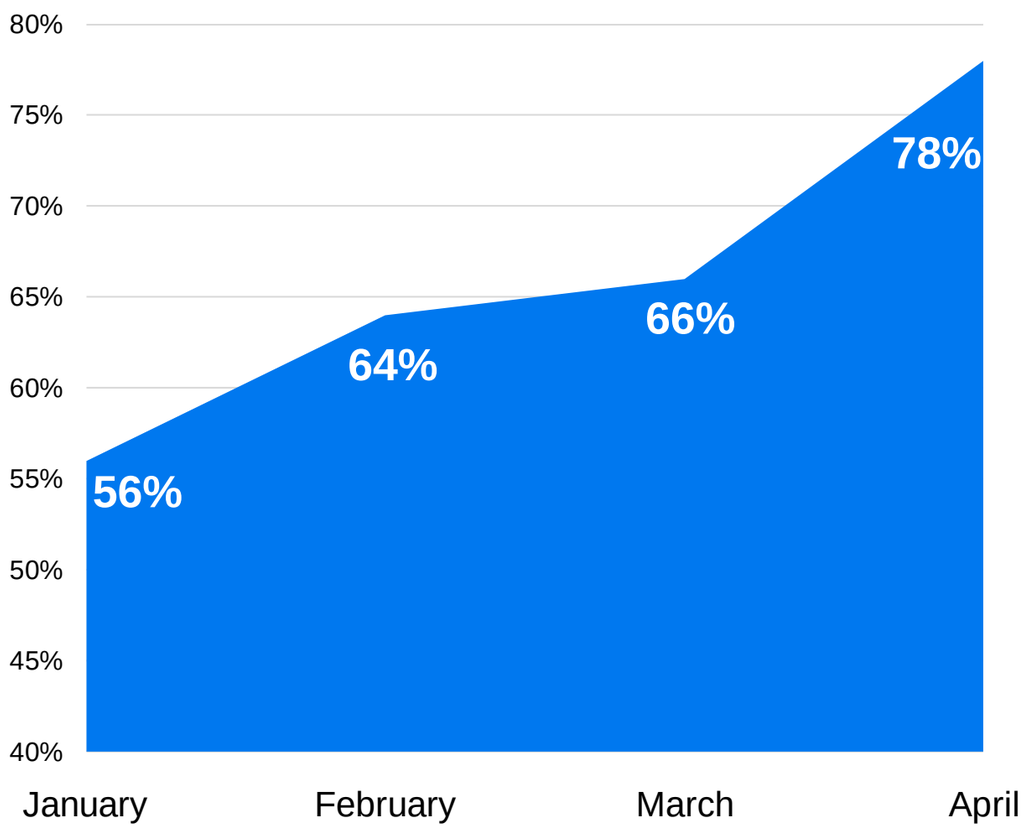
4M social media followers | 3.6M on Facebook

6.8M mobile app users

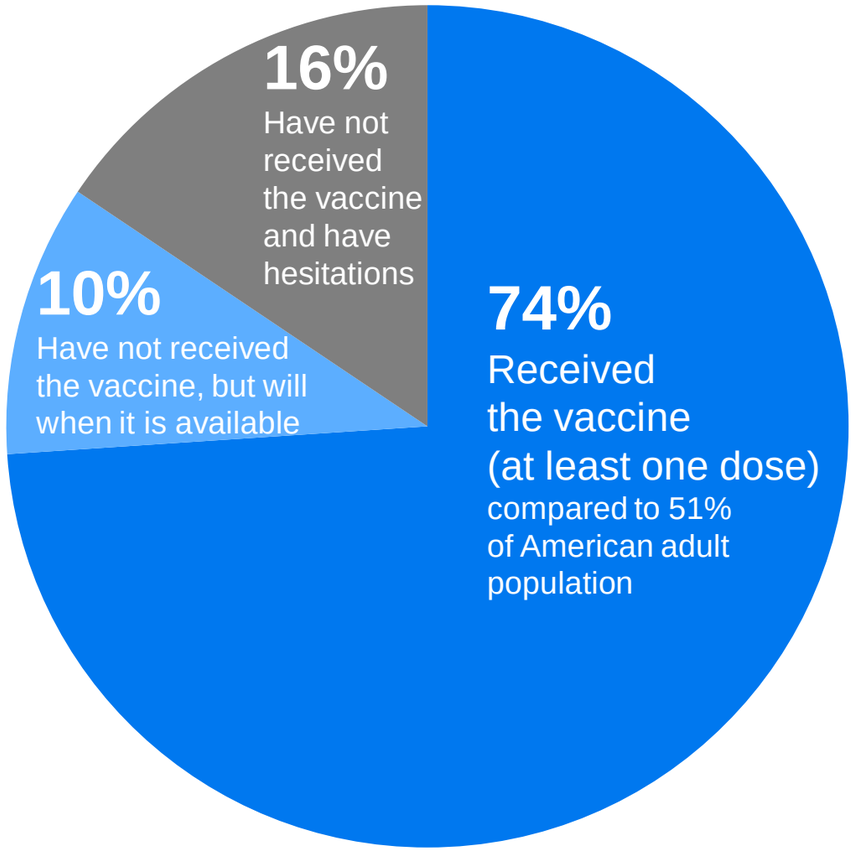
Sources: Internal Reporting; Facebook Analytics

Vaccinated, Ready to Travel

Percentage of Members Already Traveling or Ready to Travel

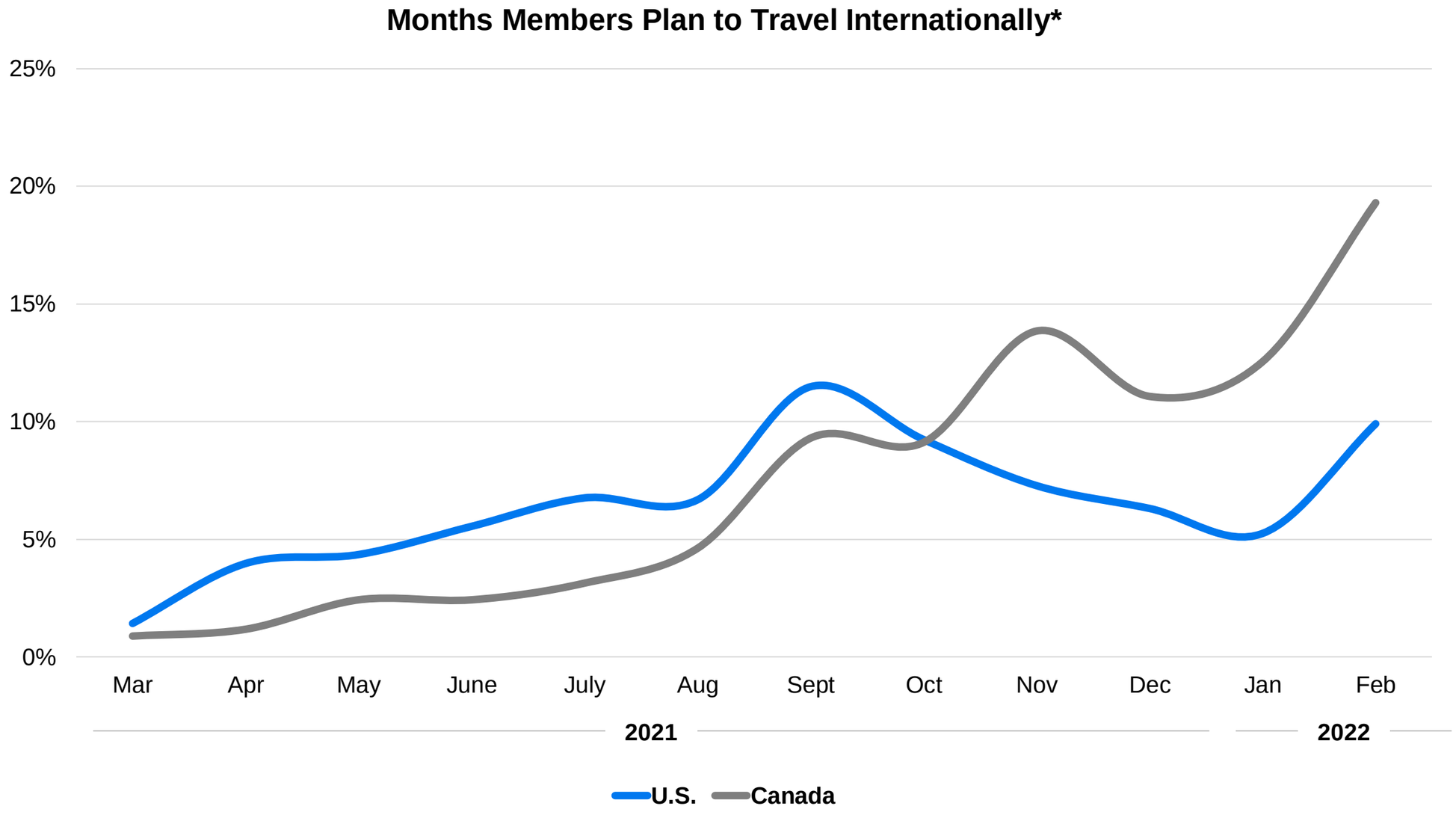


Members' COVID-19 Vaccination Status



Sources: Travelzoo U.S. Member Surveys, January 8-11, 2021, n=1,252; February 2-3, 2021, n= 1,345; March 6-8, 2021, n=1,394; April 6-8, 2021, n=1,046; NPR
Percentages may not total 100 due to rounding

International Travel Demand In Late 2021



53%
AMERICAN
members have plans for at least one international trip in the next year

62%
CANADIAN
members have plans for at least one international trip in the next year

* All months members plan to travel internationally, even if only tentatively scheduled
Sources: Travelzoo U.S. Member Survey, March 6-8, n=1,394; Travelzoo Canadian Member Survey, March 6-8, 2021, n=1,747

What Destinations Are They Dreaming About?

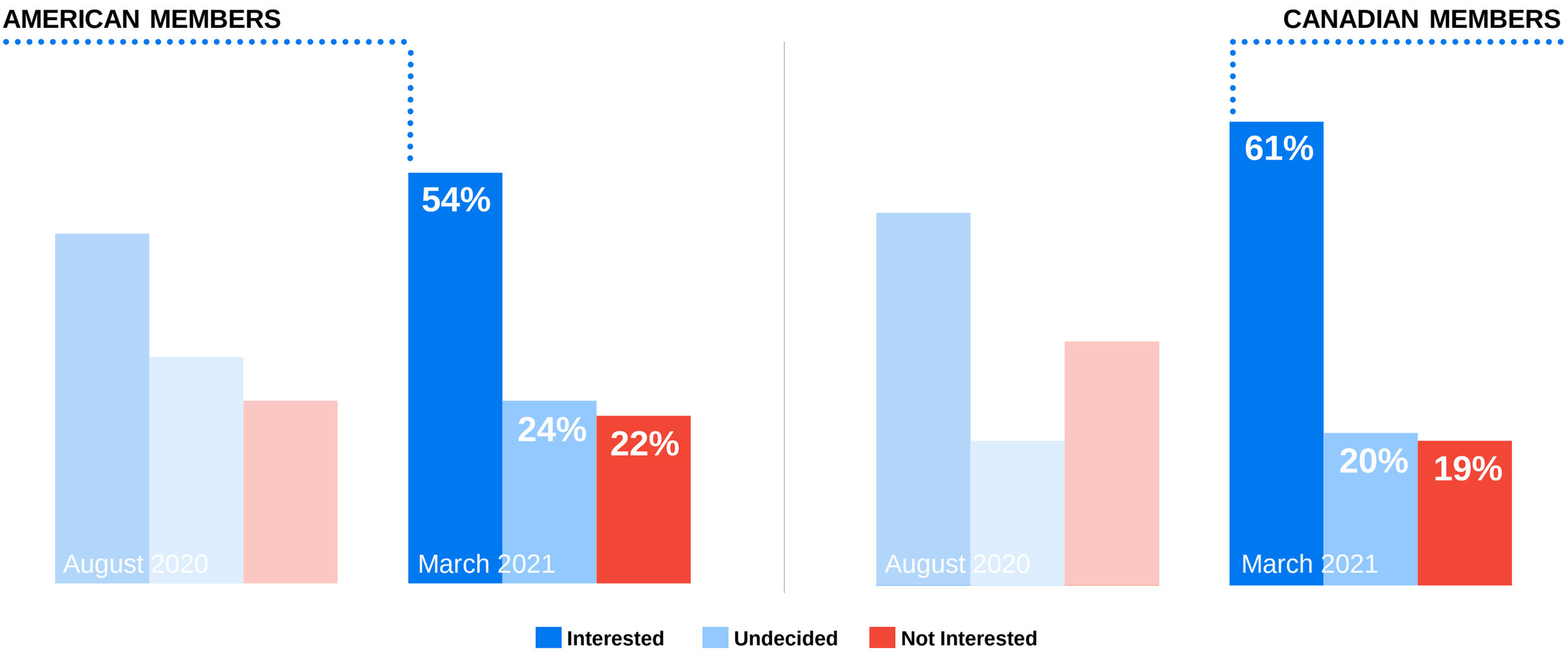
AMERICAN MEMBERS

CANADIAN MEMBERS

* Members who day-dreamed about taking a getaway or vacation in the past week
Sources: Travelzoo U.S. Member Survey, March 6-8, n=1,394; Travelzoo Canadian Member Survey, March 6-8, 2021, n=1,747

Members Interested in Visiting the Caribbean

Member Interest in Traveling to the Caribbean in the Next Two Years



Sources: Travelzoo U.S. Member Surveys, August 7-10, 2020, n=1,721; March 6-8, 2012, n=1,394;
Travelzoo Canadian Member Surveys, August 12-14, n=1,593; March 6-8, 2021, n=1,747

Caribbean Island Preference Among Americans

	AUGUST 2020	NOVEMBER 2020	MARCH 2021
1.	Aruba	United States Virgin Islands	United States Virgin Islands
2.	Bahamas	Bahamas	Bahamas
3.	Dominican Republic	Aruba	Turks and Caicos
4.	Jamaica	Turks and Caicos	Aruba
5.	Saint Martin / St. Maarten	Jamaica	Puerto Rico
6.	United States Virgin Islands	Saint Martin / St. Maarten	Jamaica
7.	Turks and Caicos	Cayman Islands	Saint Martin / St. Maarten
8.	Other	Puerto Rico	Cayman Islands
9.	Barbados	Dominican Republic	Saint Lucia
10.	British Virgin Islands	Saint Lucia	British Virgin Islands
11.	Cayman Islands	British Virgin Islands	Dominican Republic
12.	Curacao	Antigua and Barbuda	Barbados
13.	Antigua and Barbuda	Barbados	Cuba
14.	Cuba	Curacao	Antigua and Barbuda
15.	Saint Lucia	Saint Kitts and Nevis	Curacao

Sources: Travelzoo U.S. Member Surveys, August 7-10, 2020, n=1,721; November 5-9, 2020; n=1,111; March 6-8; n=1,394

Puerto Rico Resort Highlights Overall Accessibility

220+

PURCHASES
booked by U.S. members

$146,000

incremental
GROSS REVENUE

Source: Internal reporting

Caribbean Island Preferences Among Canadians

	AUGUST 2020	NOVEMBER 2020	MARCH 2021
1.	Cuba	Turks and Caicos	Cuba
2.	Jamaica	Cuba	Dominican Republic
3.	Dominican Republic	Dominican Republic	Turks and Caicos
4.	Barbados	Bahamas	Jamaica
5.	Aruba	Jamaica	Bahamas
6.	Curacao	Aruba	Saint Lucia
7.	Saint Martin / St. Maarten	Barbados	Aruba
8.	Turks and Caicos	Saint Lucia	Barbados
9.	Bahamas	Saint Martin / St. Maarten	Saint Martin / St. Maarten
10.	Other	Curacao	Cayman Islands
11.	Antigua and Barbuda	Antigua and Barbuda	Curacao
12.	Puerto Rico	Cayman Islands	Puerto Rico
13.	Saint Lucia	Puerto Rico	British Virgin Islands
14.	Martinique	Saint Kitts and Nevis	Antigua and Barbuda
15.	British Virgin Islands	British Virgin Islands	Saint Kitts-and-Nevis

Sources: Travelzoo Canadian Member Surveys, August 12-14, n=1,593; October 31-November 6, 2020; Canada n=1,214; March 6-8, 2021, n=1,747

Easily Accessible Dominican Republic Resort Drives Bookings

700+

PURCHASES

booked by Travelzoo members at a Dominican Republic resort

$304,000+

incremental

GROSS REVENUE

Source: Internal reporting

Onsite COVID-19 Testing Creates Consumer Confidence

79%
of **AMERICAN** members said onsite COVID-19 testing is important

88%
of **CANADIAN** members said onsite COVID-19 testing is important

Sources: Travelzoo U.S. Member Survey, March 6-8, n=1,394; Travelzoo Canadian Member Survey, March 6-8, 2021, n=1,747

We Asked, They Answered

What is the single most important thing for a Caribbean or Mexico hotelier to have or offer when you're deciding on whether or not to book a trip right now?

Safety

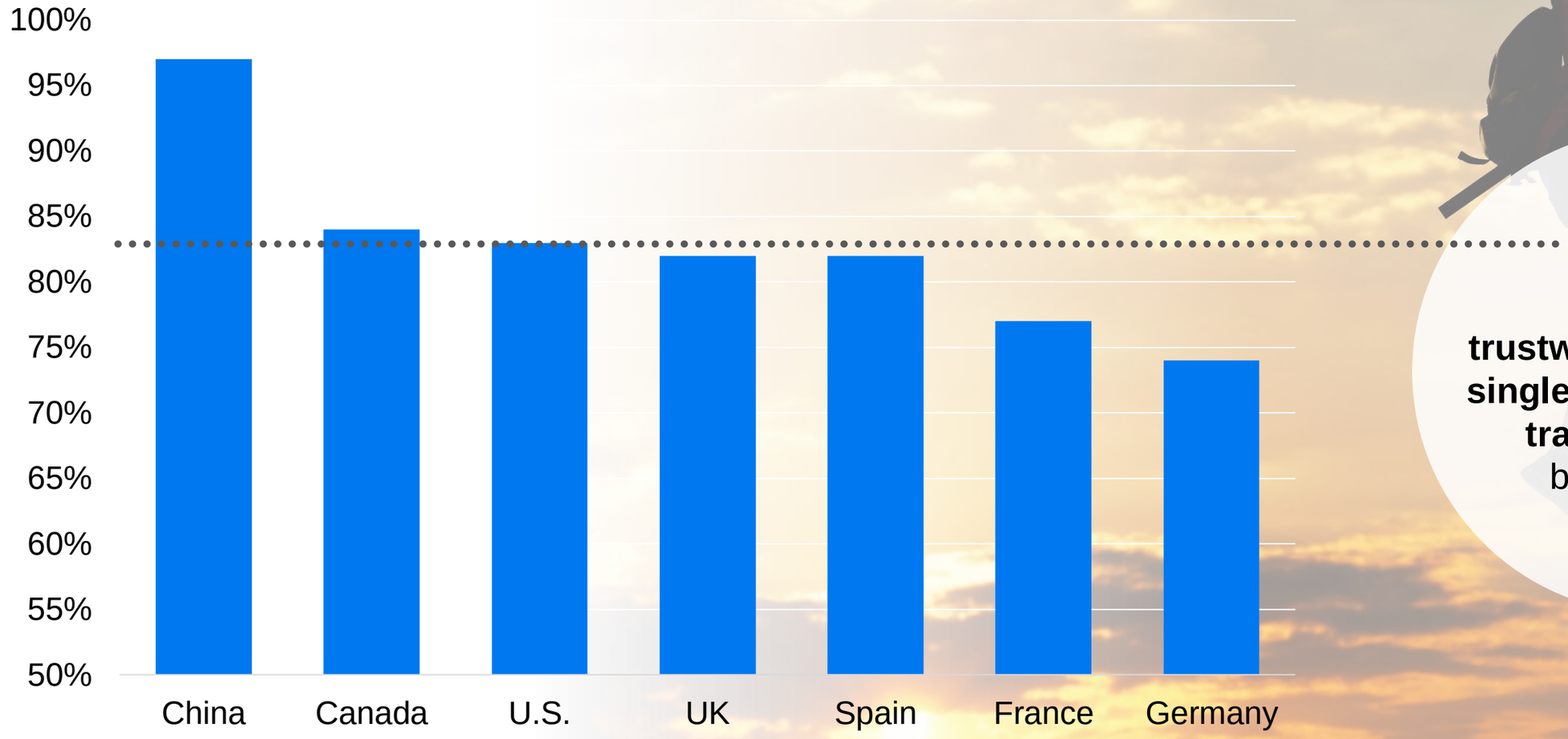
COVID-19 Testing & Protocols

Price & Flexibility

Sources: Travelzoo U.S. Member Survey, March 6-8, n=1,394; Travelzoo Canadian Member Survey, March 6-8, 2021, n=1,747

Trust is a Global Currency

Importance of trustworthiness by country



83%

agree that **trustworthiness is the single most important trait** a person or business can have

Source: Travelzoo Survey conducted via OnePoll, January 11-15, 2021, n=8,000 adults from China, Canada, U.S., UK, Spain, France and Germany

Trust In Travel

25%
trust vacation companies more now than they did **before the pandemic began**

20%
trust vacation companies **less** now

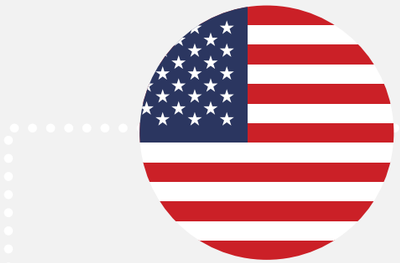
55%
remain **the same**

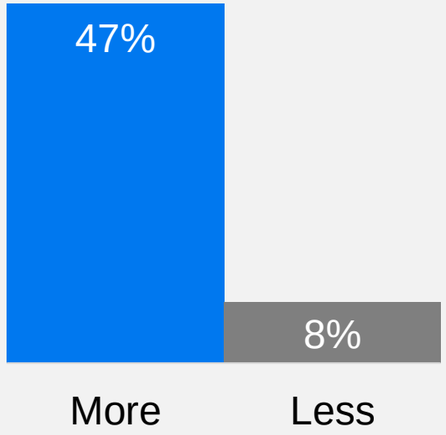
Question 15: Do you trust vacation companies more or less now than you did before the pandemic began?

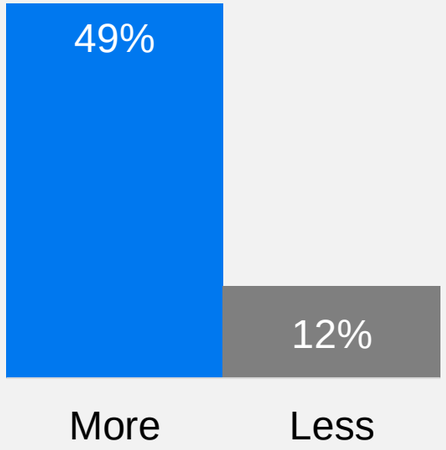
Source: Travelzoo Survey conducted via OnePoll, January 11-15, 2021, n=8,000 adults from China, Canada, U.S., UK, Spain, France and Germany

Trust In Travel – Key Country Differences

Higher levels of trust from America and China



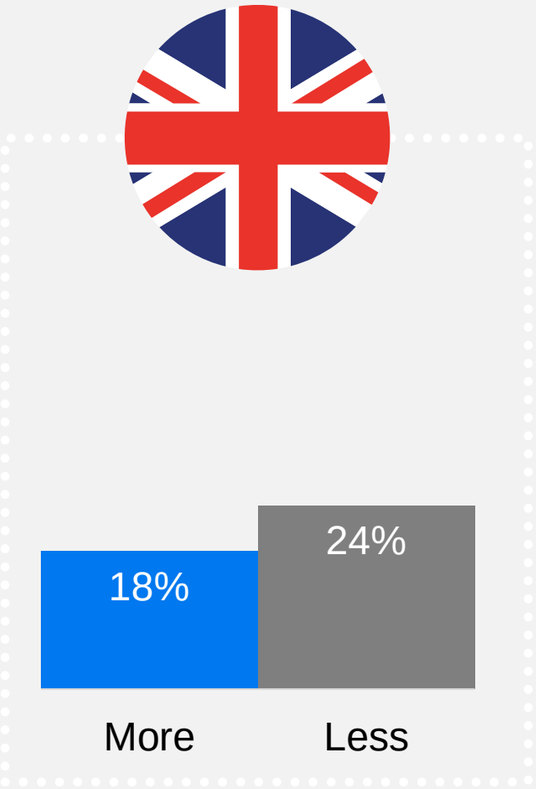


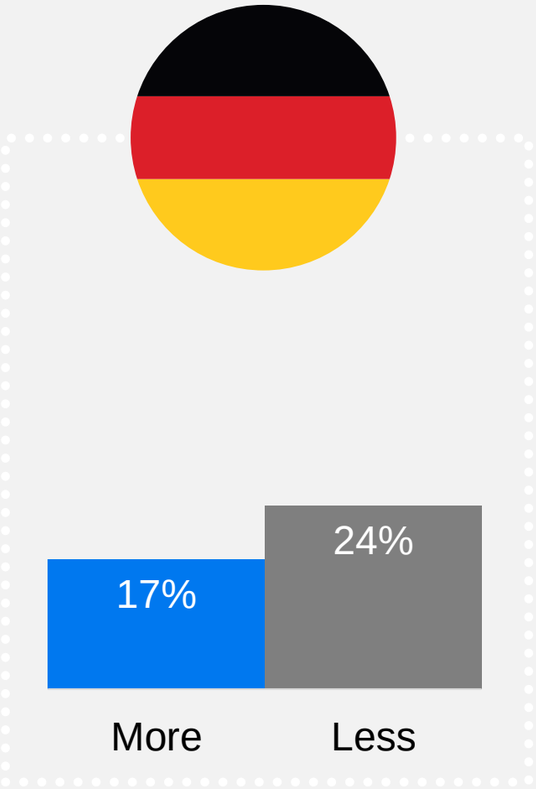


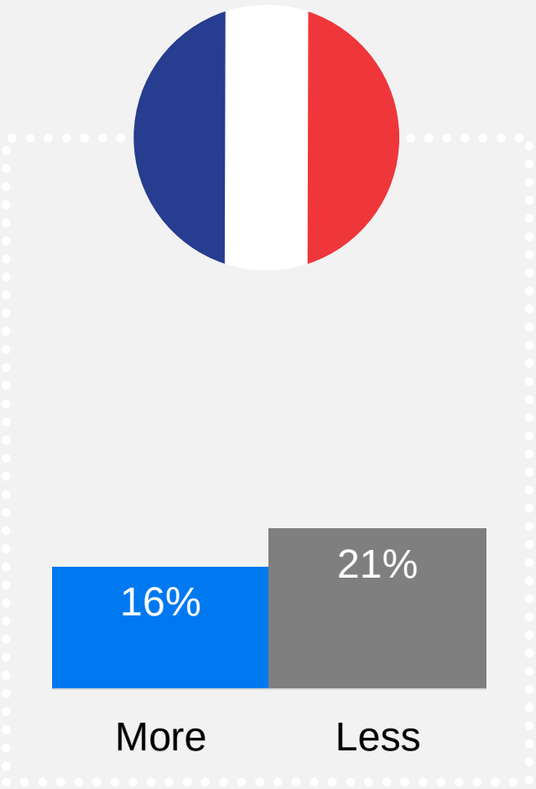
Source: Travelzoo Survey conducted via OnePoll, January 11-15, 2021, n=8,000 adults from China, Canada, U.S., UK, Spain, France and Germany

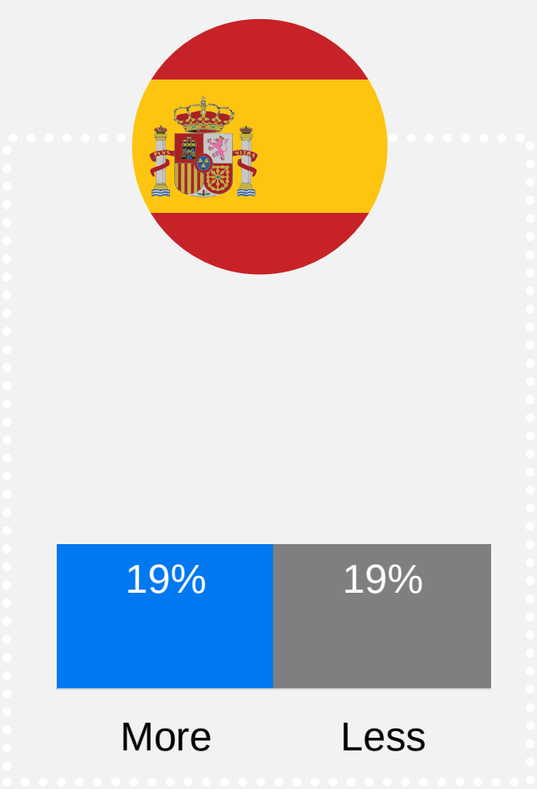
Trust In Travel – Key Country Differences

Europeans trust vacation companies less









Source: Travelzoo Survey conducted via OnePoll, January 11-15, 2021, n=8,000 adults from China, Canada, U.S., UK, Spain, France and Germany

Turning trust into bookings during the pandemic

#1 Option of money back or being able to reschedule

#2 Assurances that all pandemic precautions have been taken in method of transport

#3 Assurances that all pandemic precautions have been taken by accommodation

#4 COVID-19 testing at the airport before departure

#5 Assurance that travelling to that destination is safe

#6 COVID-19 testing at hotels or on arrival

#7 Knowing my airline has been provided with traveler vaccination data

Question 11: When booking a vacation during the COVID-19 pandemic, what reassurances would you seek? Select up to five

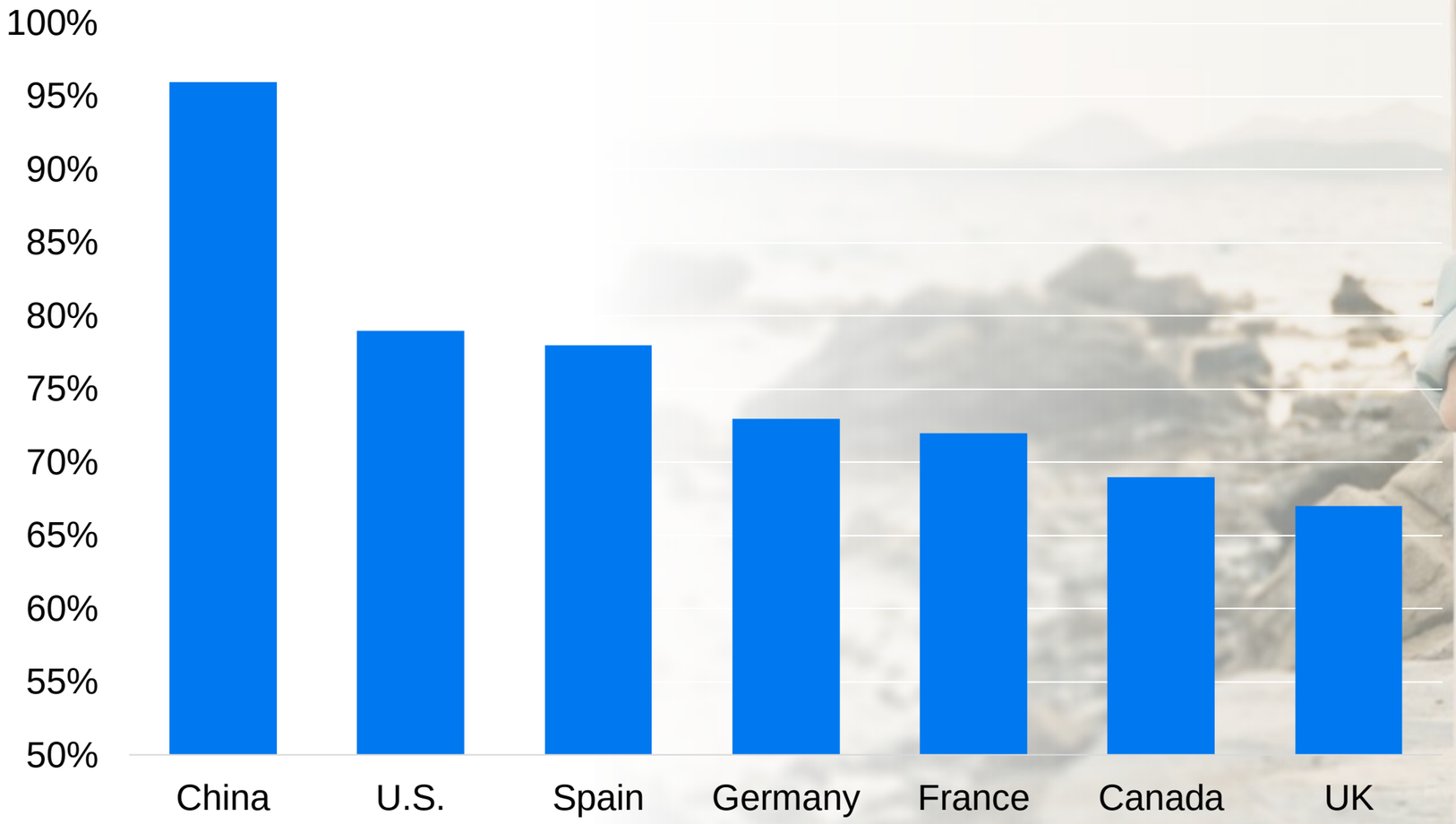
The cost of trust

75%

are willing to pay more for goods or services they know they can trust

Source: Travelzoo Survey conducted via OnePoll, January 11-15, 2021, n=8,000 adults from China, Canada, U.S., UK, Spain, France and Germany

Who will pay for trust?



Source: Travelzoo Survey conducted via OnePoll, January 11-15, 2021, n=8,000 adults from China, Canada, U.S., UK, Spain, France and Germany

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Market Updates
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MARKET UPDATES FROM SOURCE MARKETS:

- 10:30 – 10:55AM ET: CENTRAL-LATIN AMERICA
- 11:00 – 11:25AM ET: BENELUX/GERMANY/SWISS
- 11:30AM – 12:00PM ET: CANADA

CARIBBEAN TRAVEL marketplace 39

VIRTUAL • MAY 11 - 14, 2021

Market Update

SOUTH AMERICA

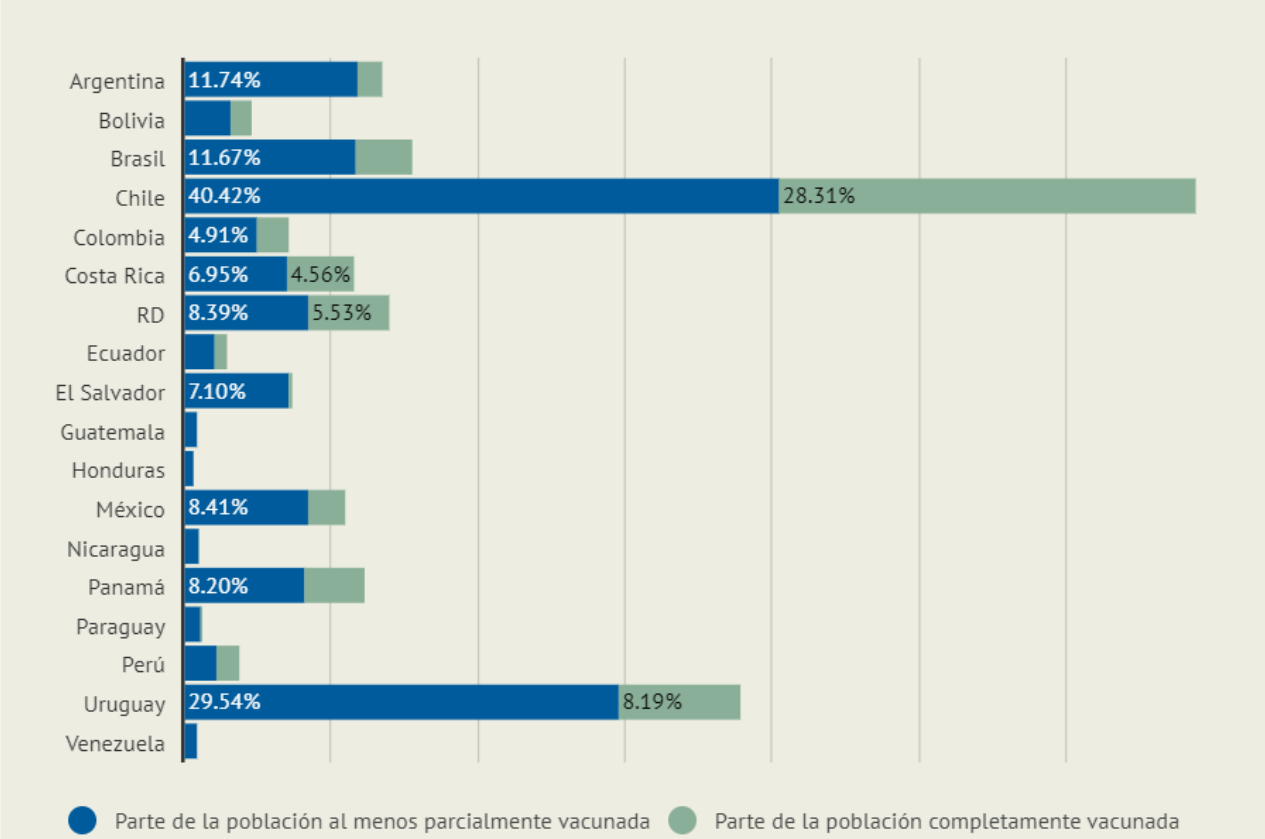
SINERGIA MARKETING TURÍSTICO

TRAVEL LIFESTYLE NETWORK

CARIBBEAN HOTEL & TOURISM ASSOCIATION

Market Update

COVID-19 VACCINATION PROGRESS



Source: AS/COA Online. Data as of 16APR

Vaccination campaign moving slowly

Southern Cone (Argentina, Chile & Uruguay) leading the way

Chile to achieve "herd immunity" by late June

CARIBBEAN HOTEL & TOURISM ASSOCIATION

Market Update

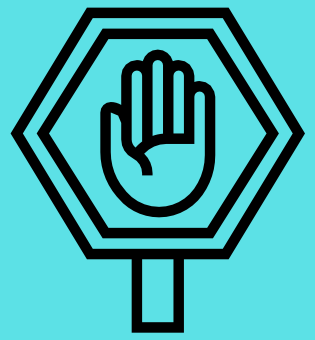
TRAVELER CONCERNS

MAY - OCT 2021

Catching COVID-19 during travel

Facing extended stay & repatriation costs

Having flights canceled before departure



Remaining stranded due to home border closure

Travel reprogramming additional costs

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Market Update

TRAVEL INSIGHTS

MAY - OCT 2021

Staycations + Short Breaks → Domestic Travel → Regional Travel (Except to Brazil)

Vaccine Tourism to the U.S. (FL) → Slight Rebound Expected in July → Travel to ramp up starting October

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Market Update

CONSUMER PRIORITIES FOR TRAVEL

NOV 2021 - APR 2022

- Vaccination Progress at Destination
- Access to Healthcare Services
- Hygene Protocols & Cleanliness
- Free Testing at (or near) Hotel
- Booking Flexibility
- Prepaid Fully Inclusive Packages

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Market Update

TRAVEL TRENDS

NOV 2021 - APR 2022

TRAVEL DEMAND

Demand to peak during summer vacations (JAN-MAR)

Uncertainty regarding Brazil to favour The Caribbean, especially Cancún, Punta Cana & San Andrés

Bookings to Europe are mostly for next year's High Season: APR - OCT

Miami (Shopping) & Orlando (Disney/Universal) to recover their share

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Market Update

FUTURE BOOKINGS & FAVOURED DESTINATIONS

NOV 2021 - APR 2022

"Gross bookings in 2021 are projected to rise 88% over 2020"

- MIAMI
- CANCÚN
- PUNTA CANA
- EUROPE
- BRAZIL

Source: Phocuswrigt LATAM Travel Market Report 2020-2024

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Market Update

WHY SOUTH AMERICA?

South Americans are travel freaks. It's in their DNA

Good air connectivity through Miami (American Airlines) and Panamá (Copa Airlines)

Favourable exchange rates help maximize promotion budget

Now is the right time to increase visibility as market demands new destinations

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Market Update

HIGHLIGHTS & OPPORTUNITIES

Digital Nomads (Workations)

LGBT

SINKs/DINKs

All Inclusive/FAP Meal Plans

Combined Packages

Cruises

Apart Hotels & Fully Equipped Villas

Weddings & Honey Mooners

Golf & Spa

Incentives

NICHE MARKETS

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Market Update

PROMOTION RECCOMENDATIONS

Communicate in Spanish

Be Present

GloCal Approach

Build Relationships

Generate Synergies

Inform, Train, Support

CARIBBEAN HOTEL & TOURISM ASSOCIATION

Market Update

A MORE DEFINED GLOBAL BRAND

“One Caribbean,
so much to discover”

Joint Promotion

Conduct a MarComms campaign showcasing both the region's identity & diversity under a unique motto.

Push Less Known Destinations

The Caribbean is much more than Cancún & Punta Cana. Build awareness of less popular destinations.

Repeat Visitors & Longer Stays

Keep travelers coming back to the region and promote extended stays by offering island hopping packages.

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Thank you!

Victor Nine

Associate Director

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www.sinergiamarketingturistico.com

SINERGIA MARKETING TURÍSTICO

TRAVEL LIFESTYLE NETWORK

South America presentation

Caribbean Marketplace 2021

André Rojer
Regional Manager, South America

CURAÇAO
SIÉNTELO POR TI MISMO

State of the South American Travel Market

State of the Region

- Majority of key South American countries are currently battling pandemic waves
- Some countries have closed borders for outbound travel (Chile, Uruguay, Surinam, Guyana)
- Region experiencing slower recovery, due to economic weaknesses prior the pandemic.
- Main regional carriers, in critical conditions, struggling to reactivate connectivity; under handful of restrictions (LATAM, Avianca, Copa Airlines, others)
- Vaccination programs are challenged by limitations, inventory, logistics, infrastructure

Current status

	BORDER STATUS	RETURN TESTING REQUIREMENTS	CURRENT ACTIVE COVID-19 CASES	VACCINATION PROGRESS %
MEXICO	Open	No	261K	9%
ARGENTINA	Open	Yes	279K	13%
BRAZIL	Open	Yes	1MM	12%
COLOMBIA	Open	Yes	115K	6%
CHILE	Closed	Yes	40K	41%
URUGUAY	Closed	Yes	27K	32%

Outbound travel potential

Outlook

- Latin America is expected to resume economic growth at 3.7%
- Region returning to its pre-pandemic GDP level in the mid-2022
- Markets that will quickly re-bounce: Chile, Colombia, Uruguay
  Brazil, Mexico will remain strong, potential markets
- Airlines will be flexible, rapidly increase capacity, improve connectivity
- Political sensitivity: Ecuador (Feb 7), Bolivia (Mar 7), Peru (Apr 11), Mexico (Jun 6), Argentina (Oct 24), Nicaragua (Nov 7), Chile (Nov 21), Honduras (Nov 28)
- the Consumer has changed, Travel Agencies changed, Airlines changed

Main concerns of the Travelers

- The ability and sense of ‘worry-free’ travel
- Last minute change in Travel Restrictions (lock-down, curfews, cancellations, tests, etc)
- Non-refundable trip elements
- Language barrier in case of assistance / emergency
- Tourists are now considering the quality of a country’s healthcare system, as deciding factor whether to travel
- If necessary resort health protocols (medidas bioseguridad) are being enforced

your future South American guests

- **94%** in “dreaming stage” and ready to travel again
- Key elements: freedom, space, de-stress, battery boost, discovery
- **(1)** Beach: 86%, **(2)** Soft adventure: 45%, **(3)** Culture & heritage: 40%
- Upcoming peak travel periods: **(A)** Jun / Jul and **(B)** Nov / Dec and **(C)** puentes / holidays
- Half (49%) of this audience will travel with kids, while 30% will be on a romantic couple getaway
- Half (48%) of this audience will book online, 38% will utilize a Travel Agent, and 39% will be booking directly with you.
- Have no problem in taking a PCR test and complying with on-island safety measures

Grab these opportunities

key highlights & opportunities

- The Caribbean is considered as the most attractive, safe region for travel
- Focus on targeted social media and digital geo-/socio audiences
- Promote your serenity, freedom, romance, beach, spa, sceneries, unique sites.
  Kids programs, renewal of vows, couple retreats, food quality
- Establish a select ‘pool’ of Wholesalers and Agencies to partner, and work closely with
- Engage with your airline partners and explore opportunities (influencers, giveaways, etc)
- Ask your local tourism authority, how can you assist them to increase traffic to the destination
- Explore creative options: vaccination tourism, volunteerism.

danki
thank you
bedankt
danke
gracias
obrigado

André Rojer
Regional Manager, South America

CURACAO
SIÉNTELO POR TI MISMO

Benelux market: opportunities tourism to the Caribbean during the pandemic, May 3, 2021.

SANDER LANGEVELD

GLOBACTIVE TRAVEL MARKETING BV

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Demography

- The Netherlands has 17.000.000 inhabitants. Pre-Covid19 the market for total 37,2 million holidays were booked million holidays were outside of The Netherlands. 13 Million Dutch (82%) of population
- Belgium has 11.46 million inhabitants. million trips abroad in pre Covid19.

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ASSOCIATION

State of the Benelux travel market May – October 2021.

Right now:

- Currently lockdown in place.
- Less restrictions expected.
- Vaccinations slow but steady.
- Who wants the vaccine could have the first of two injections by the summer of 2021.
- Negative travel advices in place.
- Economies being supported by Goverments.
- Tour operators / travel agency chains / airlines “fighting” to survive.
- Digital revolution.

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State of the Benelux travel market May – October 2021.

Outlook:

- Positive travel advices by country.
- Consumers are very hungry to go on a holiday.
- Summer holiday to the Caribbean will be an opportunity.
- Airlines will adjust capacity depending on the demand and travel advices.

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State of the Benelux travel market October, 2021 – April 2022.

Outlook, please note these are predictions:

- At the moment bookings are slow but pre-bookings for the winter 2021-2022 are quite good.
- Consumer will have more confidence to book again.
- Economies need to recover.
- Covid19 will be still be among us.
- Need to live with it.
- Consumers looking for guarantees: Flexible payment & cancellation options, travel vouchers.
- Digital revolution will continue.
- Covid19 passport will be in place by European Union.

CARIBBEAN HOTEL & TOURISM ASSOCIATION

Overal opportunities and key highlights for the Caribbean

- **Prepare a marketing strategy** - Have a marketing strategy in place
- **Communicate** - Keep in touch with the travel trade and consumers and (travel trade) media.
- **Consumers are in the orientation phase -** Planning their holidays for Q4 and 2022
- **Present the visitor expectation** - How a holiday will be during the Covid19 time: from the moment you land at the local airport, temperature check, maybe a fast test, the meet and great by the local tour operator, the transfer to the accommodation of choice. What will the experience be in your
- **Explain the Covid protocols** - It is still all about protocol, hygiene, social distancing and communication about these procedures.
- **Communication, communication** - Destinations would need to communicate with both B2B and B2C.

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ASSOCIATION

Key tour operators

The Netherlands:

Mainstream TUI Netherlands, Corendon.

Specialist: ABC Travel, Bon Travel

Belgium:

Mainstream TUI Belgium,

Specialist: Travelworld, Rainbow.

Luxembourg

Usually book with Belgium, French or German tour operators.

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ASSOCIATION

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

- All destinations are fighting for new airlift capacity. It is predicted that there will be less airlift capacity 2020 -2023.
- Are all seeking for the same tourist.
- Push dual destinations: The tourist love the island hopping. Dual destinations.
- So improved inter-island flights are key. We hear about projects about electric flying.
- When implementing and investing in implementing the necessary safety precautions and protocols think about sustainability. Same counts for investment in tourism infrastructure.
- Highlight what you are doing for sustainability and position it. Bonaire is doing this with Blue Planet.
- This is a time more than ever to work together and be united as one Caribbean.
- Good to exchange knowledge. We have many channels CHTA, CTO, Caricom and local tourism boards & hotel associations.
- Your neighbour (island) is not only your competition but your partner. We see a lot of go local initiatives here in the Benelux. We have a Dutch saying: A good neighbour is better than a friend far away.
- There is a piece of the cake for everybody.
- If neighbour / region / competition is doing good you are doing good too or even great.

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ASSOCIATION

Contact Information

The Covid19 crisis gives us opportunities for short and long term. Take the chance. In the meantime stay safe. Thank you very much.

We are in this together.

GlobActive travel marketing

Sander Langeveld & Ryan Hart

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CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

PRESENTATION DACH MARKET

KPRN

network

Verena Kosnar
CEO Kreativ Lounge
Member of KPRN Network

STATE OF THE TRAVEL MARKET

KPRN network

GERMANY

- Strict measures based on the incidence rate (valid until 30.06.)
- Curfew restrictions, closed shops, restaurants, hotels if the incidence number exceeds 100
- Contact restrictions for private meetings indoors and outdoors
- All persons entering Germany by plane have to present a negative test result to the carrier before departure (valid until 12.05.)

AUSTRIA

- Curfew restrictions, closed shops, restaurants, hotels
- Contact restrictions for private meetings indoors and outdoors
- On 19 May, Austria's gastronomy, tourism, culture and sports sectors will be reopened slowely with strict measures
- All persons willing to be vaccinated should receive vaccination by summer

SWITZERLAND

- Shops, museums and zoos open again
- Sometimes hotels are open for tourists - depending on the individual regions
- Entry form and negative test for entry by plane. Quarantine obligation from countries and regions with an increased risk of infection.
- All persons willing to be vaccinated should receive vaccination by summer

CONCERNS OF THE TRAVELER

KPRN network

- concerns regarding Corona security at airports and on aircraft
- hygiene and service standards, medical care on site
- uncertainty regarding changes in entry requirements during the trip
- reluctance to book due to threat of cancellation costs, recurring travel restrictions and quarantine regulations after coming back

Result of a survey on holiday planning in Germany and Austria: 52% of respondents in Austria and 39% in Germany say they would wait for further developments and book at very short notice. Every third person plans to book only in the last four weeks before the travel date.

When booking an offer, holidaymakers pay particular attention to a money-back guarantee in case the trip cannot be carried out and to generous cancellation conditions. Adequate hygiene measures and the security of getting home again despite border closures or flight cancellations are also important to guests.

CONSUMER PRIORITIES FOR TRAVEL

KPRN network

The travel trends pre-Covid-19 were moving in towards sustainability, unique experiences and away from over tourism. These trends are now intensifying as the industry is detecting the following tendencies:

DESTINATION SELECTION

- medical care on site
- hygienic cleanliness of all on the journey encountered sites
- distance to other travellers
- good flight connection

BOOKING BEHAVIOUR

- trend towards booking at the local travel agent will increase more.
- clients look for a security (money back guarantee, return guarantee in case if cancellation/crises)

A MORE CONSCIOUS CHOICE

- people will put more emphasis on the choice of the destination
- smaller number of trips per year, but a more conscious travel
- boutique hotels, villas, vacation homes and sailing are big trends

AWAY FROM OVERTOURISM

- non-overcrowded destinations
- desire to keep a distance towards other travellers
- individual travel will gain
- demand for privacy and sustainability

FAVOURED WORLDWIDE DESTINATION

KPRN network

- non-overcrowded destinations with intact nature
- destinations that are easily accessible
- destinations that offer a comprehensive range of sustainability and eco-tourism services
- Destinations that offer recreation combined with experience
- destinations where value for money is good
- destinations that ensure stability and security

POTENTIAL OF DACH TOURISTS

KPRN network

The European traveler is characterized by its relatively long period of leave and its available budget. A look at the German-speaking countries will illustrate the potential and **buying power** of the European market.

	GERMAN TRAVELLER	AUSTRIAN TRAVELLER	SWISS TRAVELLER
Travel Intensity:	78.1%	78.3%	90%
Travel Frequency:	1.3 trips yearly	1 trip yearly	2 trips yearly
Av. Length of Stay:	13 days	18 days	10.6 days
Av. Travel Expenditure:	per person: EUR 1.033 (long-haul EUR 2.213)	per person: EUR 1.237 (long-haul not available)	per person: CHF 1.611 (long-haul not available)
Interesting Fact:	second largest outbound travel market in the world	strongest long-haul travellers in Europe	second largest travel spend in Europe

Sources: different Tourism Statistics and Analysis from Germany, Austria and Switzerland; all numbers pre-Covid-19

OPPORTUNITIES FOR CARIBBEN RESORTS

KPRN network

- 77% of the people in DACH are missing traveling. 58% of Austrians want to travel or are very likely to travel this fall/winter, among Germans, 55% are planning a trip in the next six months.
- active tourist board / sales representative in the market with an extensive network and market knowledge (own office or representation by an agency)
- sufficient hotel capacity for the market
- long-term commitment to the market
- good flight connections – both long haul and within the Caribbean
- stimulate consumer demand (PR & marketing)
- train travel agencies and convince them to sell the Caribbean

THANK YOU FOR YOUR ATTENTION!

KPRN network

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ROAD TO RECOVERY

CONFIDENTIAL

PRESENTED BY : DIANA RODRIGUEZ/DIRECTOR PRODUCT DEVELOPMENT

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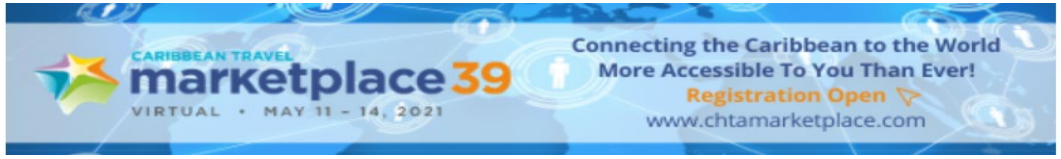

RESPONDING TO MARKET CONDITIONS

1ST

- ENSURE AS MUCH FLEXIBILITY AS POSSIBLE
- INTRODUCE NEW TRAVEL PROTECTION PROGRAMS
- OFFER EXCLUSIVE RATES
- IMPLEMENT SAFETY PROTOCOLS
- COVID-19 COVERAGE AND ASSISTANCE PLAN
- FIRST TO BRING VACATIONS BACK

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| WHERE CAN YOU TRAVEL? |

31 SUNNY DESTINATIONS

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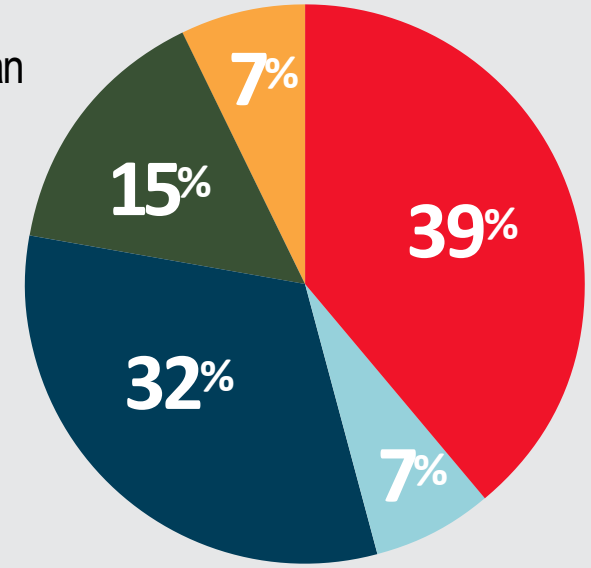
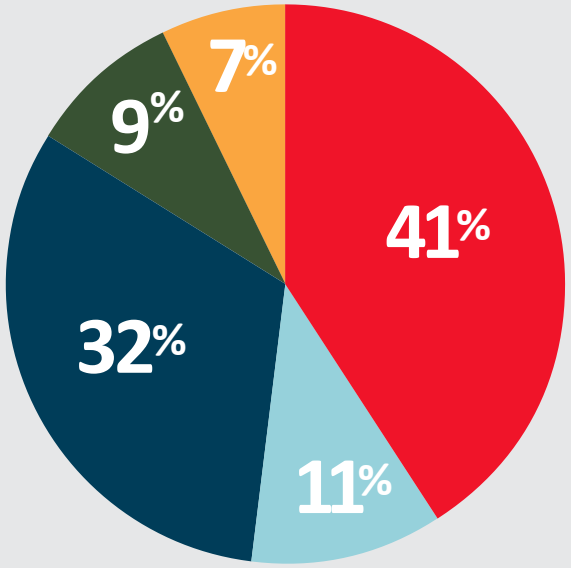
Given the current global context, what's most important to you when it comes to planning a vacation?

- Flexibility changing travel plan
- Government policies
- Health & safety protocols
- Insurance coverage
- Savings



What is your biggest deterrent for travel?

- Fear of contracting COVID-19
- Presenting a COVID-19 test upon arrival to destination
- Quarantine upon return to Canada
- Concerned with the experience at destination
- Concerned with the experience in-flight / at the airport



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| ENHANCED TRAVEL PROTECTION |

CAREFLEX PLUS

- Change your booking
- Transfer your package
- Cancel with a full refund up until 25 days prior to departure

CAREFLEX

- Change your booking
- Transfer your package
- Cancel with an in-house travel credit and/or a partial refund

CAREFREE

- Standard seat selection
- Year-round Price Drop Guarantee
- StormGuard
- $50 waiver on administrative change fees

NEW

FLEX PROGRAM • FOR GROUPS •

Customers can book a vacation with 10 people, including kids and cancel or change their travel plans for FREE!

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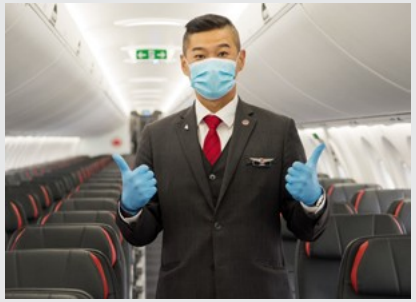
| AIR CANADA CLEANCARE+ |

Air Canada was **the first** airline to introduce an industry-leading program committed to end-to-end health and safety protocols called **CleanCare+**

CLEANCARE+



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| OUR COMMITMENT TO SAFER TRAVEL |

As an extension of **Air Canada CleanCare+,** Air Canada Vacations implemented new **health and safety standards** which include the enhanced grooming of vacation transfer vehicles and safety protocols throughout the travel journey.

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DESIGNED TO COVER
EMERGENCY MEDICAL AND QUARANTINE COSTS
RELATED TO COVID-19 WHILE TRAVELLING

What to know about the COVID-19 Coverage & Assistance Plan

- If you are an eligible traveller and have booked one of our vacation packages, you are covered under the COVID-19 Coverage & Assistance Plan.
- There is no additional cost to you. Air Canada Vacations will cover the cost of coverage.
- The plan covers eligible travellers departing between September 4, 2020 and October 31, 2021.

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WHAT'S NEW?

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THE JETZ EXPERIENCE

AN ULTIMATE ESCAPE

PRIME GATE LOCATIONS
PRIORITY SERVICES

- Priority check-in & Maple Leaf Lounge access
- Quicker boarding process: 35 min prior to departure
- 2 Complimentary checked bags

ENHANCED COMFORT
PREMIUM EXPERIENCE

- 58 Business Class seats only
- Spacious cabin configuration
- 42-49 inch seat pitch
- Group seating arrangements
- Care kits & Air Canada Rouge iPads
- Meal & bar services

PRIVATE SAFE TRANSPORTATION IN A LUXURIOUS* VEHICLE

- Private return transfer from airport to hotel
- Welcome beverage
- Cold towel
- Safety protocols

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INTRODUCING

EPACKAGES SHOPPING

WITH AIR CANADA VACATIONS

ADVANTAGES

- Lowest available fares
- Multiple Flight & Hotel packages (excluding transfers)
- User-friendly and flexible booking options
- 300 ACV&ME points per room

TO CELEBRATE THE LAUNCH OF THE EPACKAGES OPTIONS, AIR CANADA VACATIONS IS OFFERING **1 FREE CHECKED BAG PER PERSON** ON ALL EPACKAGE BOOKINGS.

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SIMPLIFIED PROCESSES

Toserve our mutual customers with the trust, speed and convenience they've come to expect, we launched an automated process to book packages online using Future Travel Credits

- **NO NEED TO CALL OUR CALL CENTRE**
  Travel agents can now make bookings with future travel credits online
- **COMPLETE AUTOMATION**
  Agents are capable of splitting value of original booking into multiple bookings
- **FAMILIAR TOOLS**
  Future travel credits can be used on SoftVoyage and Tripbook

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THANK YOU

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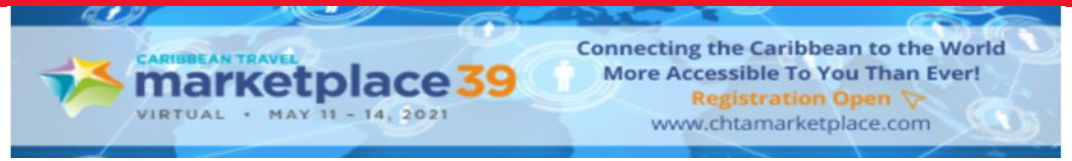
Making your
dreams travel®



unique vacations canada INC.

CANADIAN MARKET

UPDATES & TRENDS

Maureen Barnes-Smith
VP Sales & Marketing- Unique Vacations Canada Inc.
(Worldwide Representatives of Sandals & Beaches Resorts)

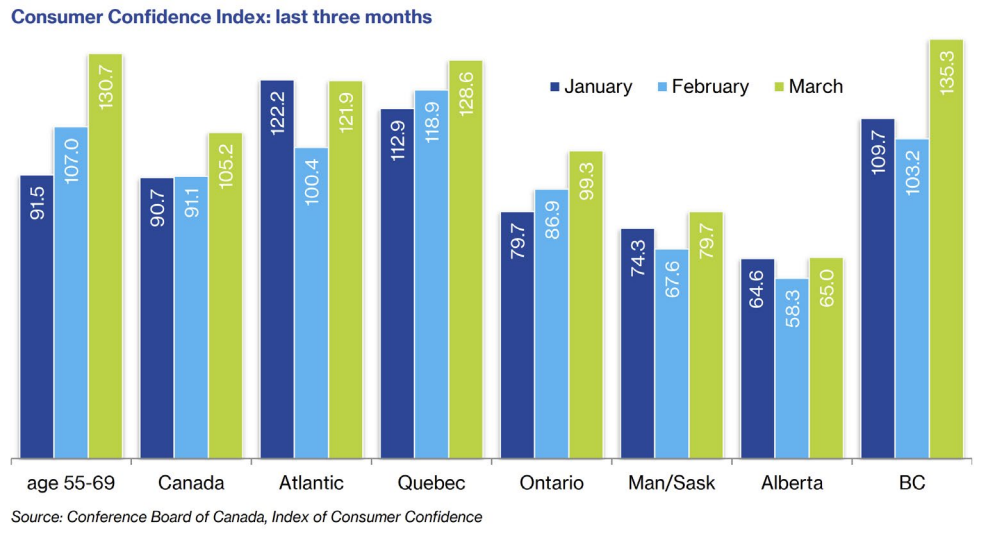
CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

CANADIAN TRAVELLER CONCERNS

unique vacations canada INC.

Main concern – when will Canadians be able to safely travel?

- Consumer confidence continued to climb in March across all provinces in Canada - the largest monthly increase since June 2020



- 88% of Canadians miss travel
- 83% report that they will take a international trip once vaccinated

CARIBBEAN HOTEL & TOURISM ASSOCIATION

SNAPSHOT OF THE CANADIAN MARKET

unique vacations canada INC.

Current Covid Stats:

Canada cases

Updated Apr. 26 at 10:05 a.m. local

Confirmed	Deaths	Recovered
1,178,987	23,965	1,068,792

Vaccination Trends: as of April 26, 2021

- **Over 10 million** (over 25% of the population) have received at least one dose of a COVID-19 vaccine.
- **Over 1 million** are fully vaccinated with two doses
- End of April targeted for influx of vaccine supplies

Market Overview:

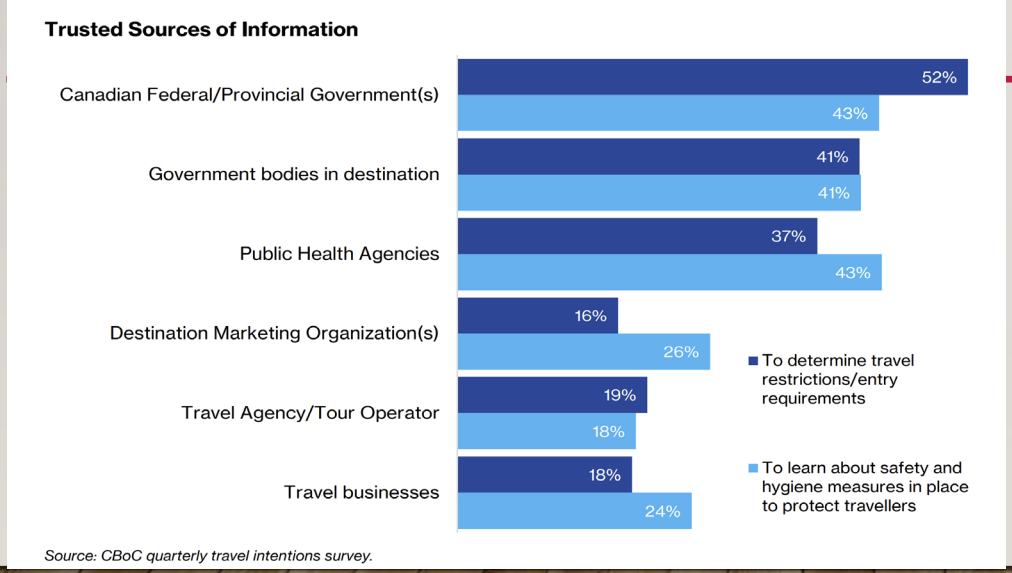
- Border closures and sun destination flights on hold
- Return quarantine measures

CARIBBEAN HOTEL & TOURISM ASSOCIATION

CONSUMER TRENDS

unique vacations canada INC.

- Canadians are much more optimistic about the future!
- Compared to the beginning of the season, a larger proportion of outbound travellers plan to vacation in the Caribbean and Mexico
- Travel agents will play an increasingly important role in the recovery
- Domestic and foreign government bodies were identified by the majority of travellers as their **primary source of information** related to both travel limitations and public health protocols



CARIBBEAN HOTEL & TOURISM ASSOCIATION

CONSUMER TRENDS

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- 57% say the quarantine policy upon return to Canada makes them less likely to consider an outbound
- 53% cite infection rates globally and in Canada (47%) as a barrier.
- 42% per cent said that the testing requirement for returning travellers make them less likely to travel internationally

POSITIVE NEWS!!

- Once the global crisis subsides, pent-up demand is expected to expedite the recovery.
- 72 % of travellers have positive travel intentions

OPPORTUNITIES FOR THE CARIBBEAN

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- We have collective ownership – all partners are vested in the success of the Caribbean
- Where will travellers go?
  - **Mexico or the Caribbean ranked as the second most desirable destination - (29%) just behind the US which ranked at just over a third.**
- Our Caribbean response has to be strategic and cohesive based on traveller research trends on factors that will positively influence travel decisions:
  - **Destination infection and vaccination rates**
  - **Travellers continue to rank very highly health and safety measures and distancing protocols at their destination**
  - **Visitor testing protocols and local vaccination rates are also high priority**
  - **The number one factor impacting willingness to book is the availability of flexible booking and cancellation policies!**

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OPPORTUNITIES FOR THE CARIBBEAN

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- Strong Booking trends particularly for **all-inclusive resorts** in Mexico and the Caribbean continue to top the list of preferred locations among travelers these days **(Travel Market Report)**

WHY??

  - Provide you with your own little travel bubble
  - Layout and size of most all-inclusive resorts lend themselves to social distancing
  - Controlled capacity – offers an environment that provides dining, entertainment, and outdoor activities in one place
  - Exceptional attention to sanitation and safety protocols

- Proximity and direct air lift
- Converted Cruisers
- Redirected Travellers from other destinations (Europe & Asia)

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THE WAY FORWARD

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- Quality versus quantity
- Flexibility and versatility
- Diverse experiences
- Maintaining strict information flows
- Adherence to established protocols

- Source: American Express Travel Survey

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