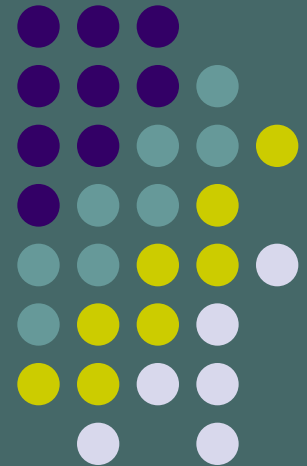




UNWTO
Award for
Innovation

A complimentary analysis offered to the CMT hosting the CTO SOTIC 2013

“Perfecting the Caribbean (digital) experience”



DATA SOURCE: TRAVELSAT©



- Reference **Benchmarking Survey** launched in 2011
- **UNWTO endorsed** – Ulysses **Award for innovation**
- Independent data collection – **Global coverage**
- Destinations' **competitiveness** based on visitors' experience
- **80** indexes. **50+** segments. **200+** destinations. **35 000+** interviews
- Combines **traditional surveys** and **Big Data** analysis



Special benchmark analysis including:

Bahamas, Barbados, Cuba, Dominican Republic, Florida (Keys islands), Guadeloupe, Jamaica, Martinique, Puerto Rico, St Lucia, St Maarten, Fiji islands, Cayman islands, Maldives, Mauritius, La Reunion, Australia, New Zealand, Hawaii, Nouvelle Caledonia, Greece, Turkey, Croatia, Cyprus, Malta, France (Riviera and Corsica), Italy (Sicilia and Sardinia), Madeira, Spain (Balearic islands, Canary islands), Brazil, Mexico, Indonesia, Malaysia, Thailand, Philippines, Abu Dhabi, Bahrain, Dubai, Oman, Qatar, Egypt (Red Sea), Morocco, Tunisia.

TRAVELSAT© Indexes Methodology



Standard post-visit survey

- Experience rated by visitors
- Multiple channels of recruitment
- All markets & trip purposes
- 80+ indexes covering the full trip experience



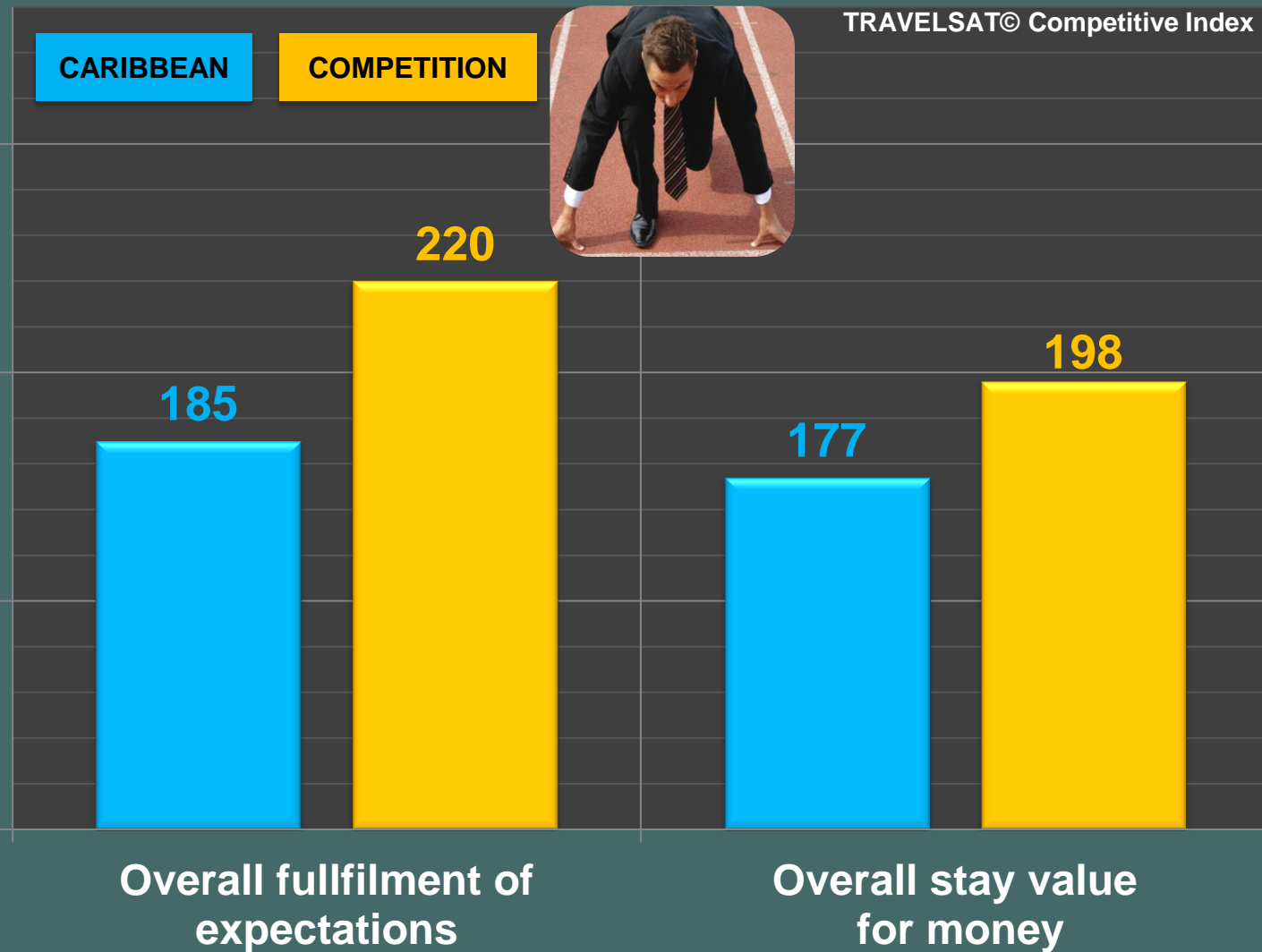


TRAVELSAT Competitive Index

1/ Why “perfecting the experience”
has become crucial...

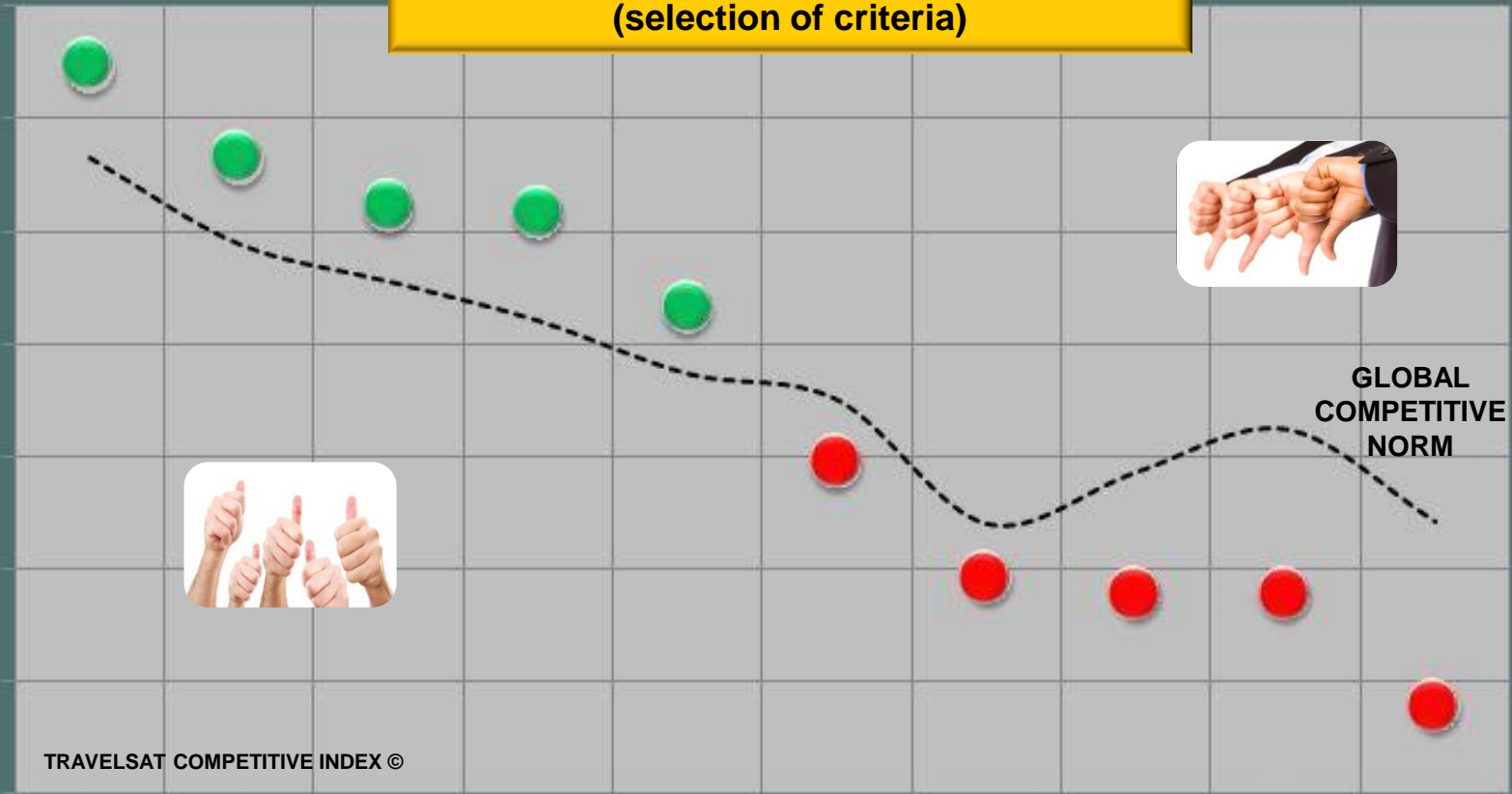


Caribbean destinations are challenged by the global competition on visitors' experience...



CARIBBEAN BEACHES COMPETE WELL... BUT IT IS NO LONGER ENOUGH !

CARIBBEAN VS GLOBAL COMPETITION (selection of criteria)



GLOBAL
COMPETITIVE
NORM

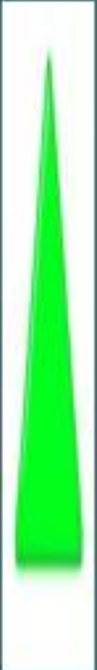
TRAVELSAT COMPETITIVE INDEX ©

- Beach beauty
- Beach diversity
- Water activities
- Beach cleanliness
- Safety for swimming
- Cleanliness in/outside cities
- Urban devpt & architecture
- Shopping diversity
- Digital hospitality



PERFECTING ALL EXPERIENCE FACETS ...MORE THAN COMPETITION

MAPPING THE CARIBBEAN COMPETITIVE STRENGTHS & WEAKNESSES



TOP 5 <i>most competitive</i> areas in Caribbean destinations	... <i>Higher satisfaction levels vs ...</i>	... <i>BUT lower satisfaction levels vs ...</i>
Beaches (beauty, diversity)	North Africa Asia	Indian Ocean
Leisure activities, nightlife	Indian Ocean North Africa	Latin America
Local food quality (value for money, hospitality, diversity)	Indian Ocean North Africa	Latin America Asia
Shopping (diversity, handicraft)	Indian Ocean Pacific	Emirates and Asia (diversity and shops hours/days opening)
Local people (ease of communication, hospitality)	Asia Arabian Emirates North Africa	Latin America

TRAVELSAT Competitive Index

2/ Perfecting visitors' experience in Caribbean...

What about digital experience ?



Where digital apps can improve experience



TOP 10 criteria mostly influencing visitors' experience

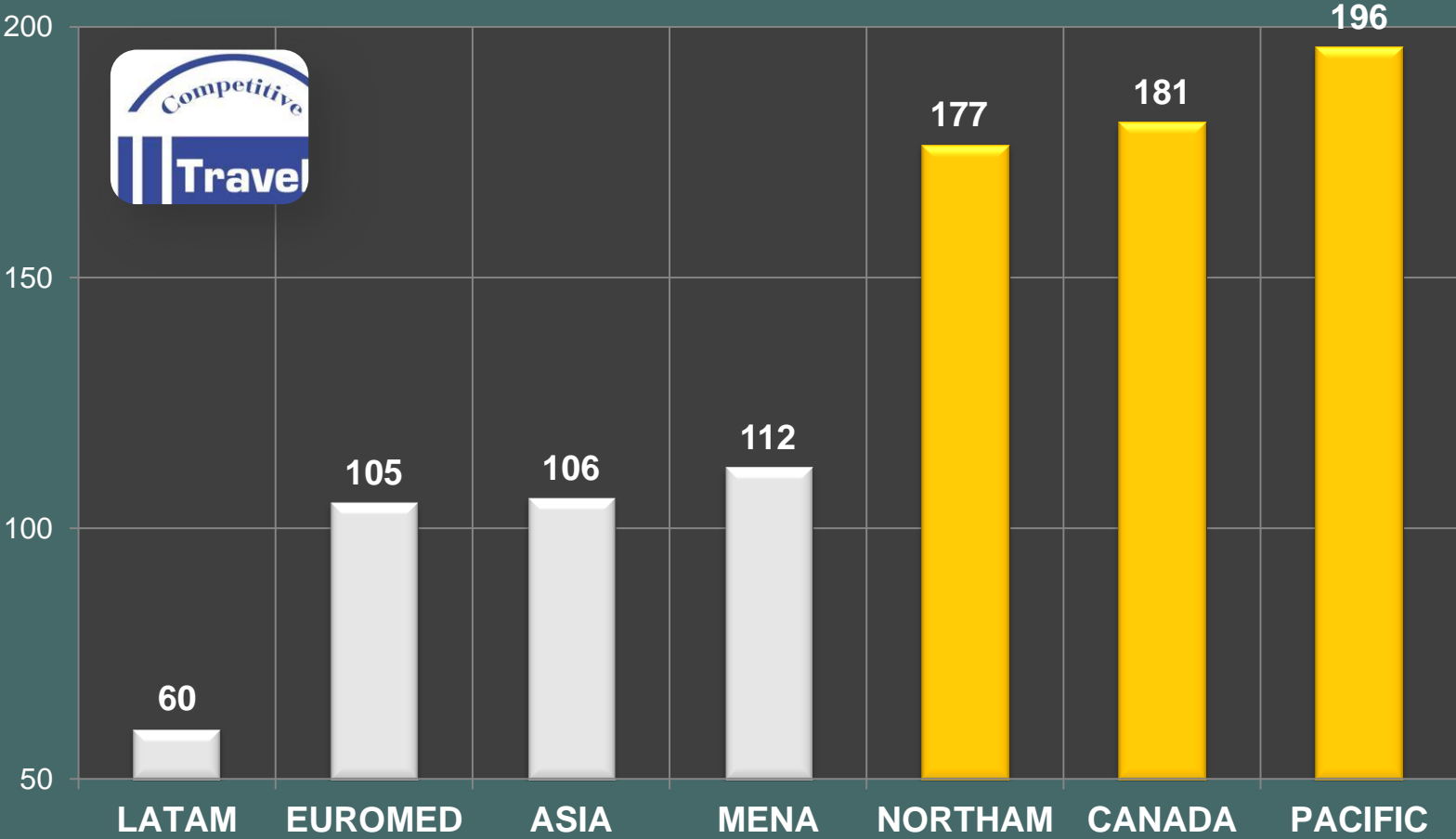
1. Landscape beauty
2. Hospitality of local residents
- 3. Feeling of safety
- 4. Accommodation quality
5. Cleanliness, environment
- 6. Historical heritage, museums
- 7. Signs, orientation
8. Beach beauty and diversity
- 9. Cultural and leisure activities
- 10. Local food quality



Correlation analysis between overall satisfaction and detailed satisfaction criteria, all markets and destinations together

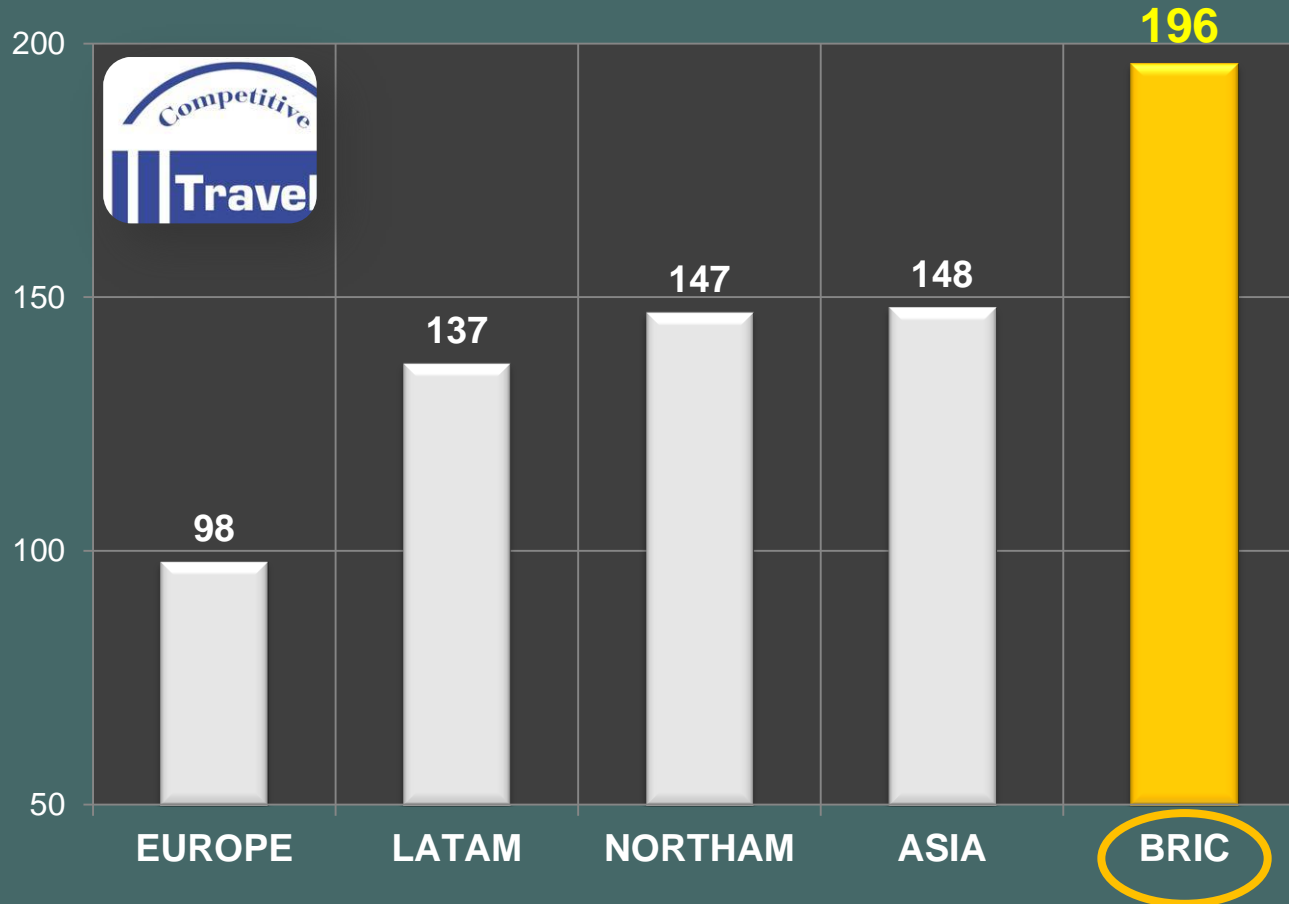
NORTH AMERICA/AUSTRALIA STILL LEADING THE RACE

Satisfaction with Digital Hospitality per activities *Average All Destinations*



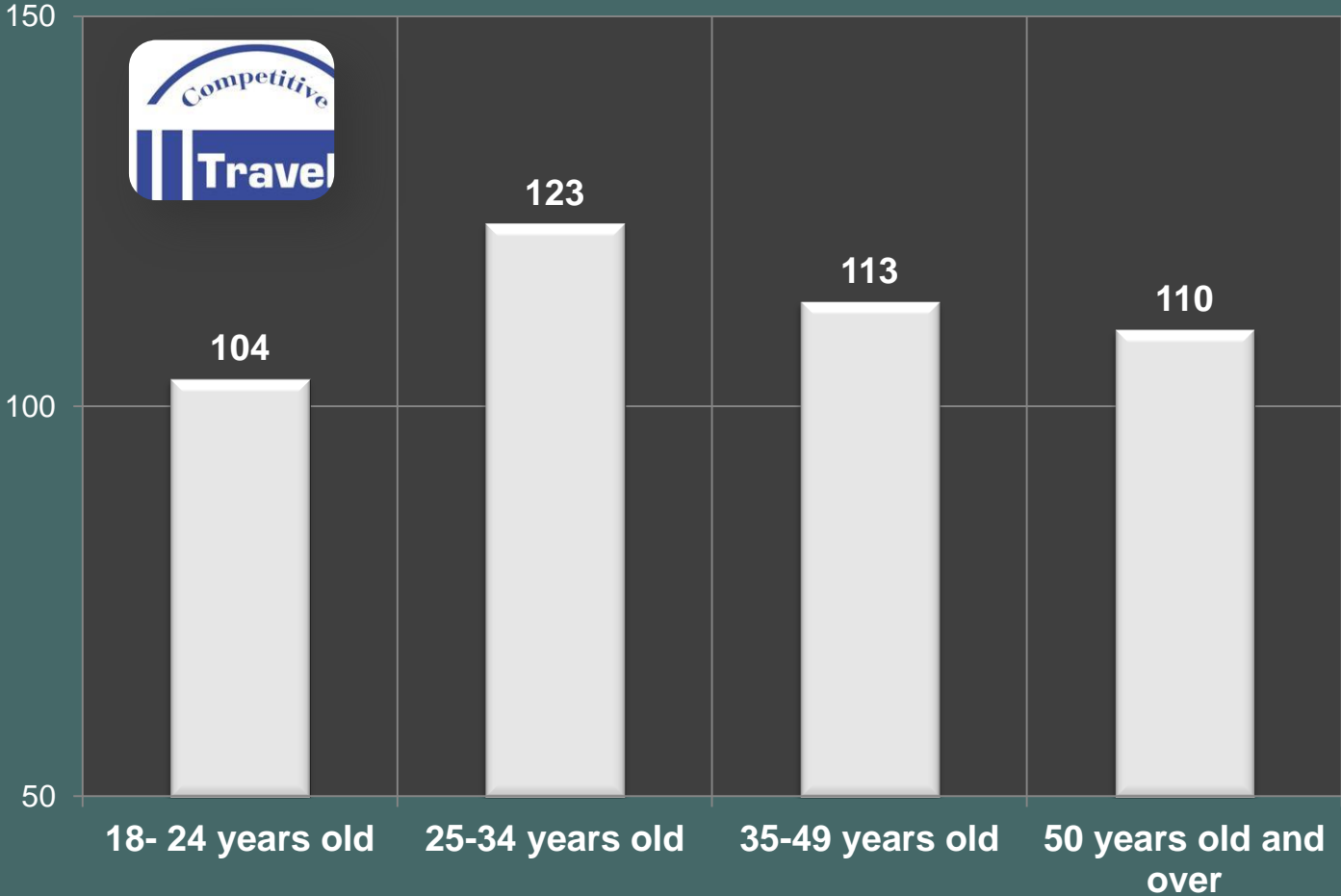
BRICs FIT WITH DIGITAL HOSPITALITY !

Satisfaction with Digital Hospitality per Outbound Market *Average All Destinations*



EFFORTS TO MAKE FOR ALL AGE GROUPS

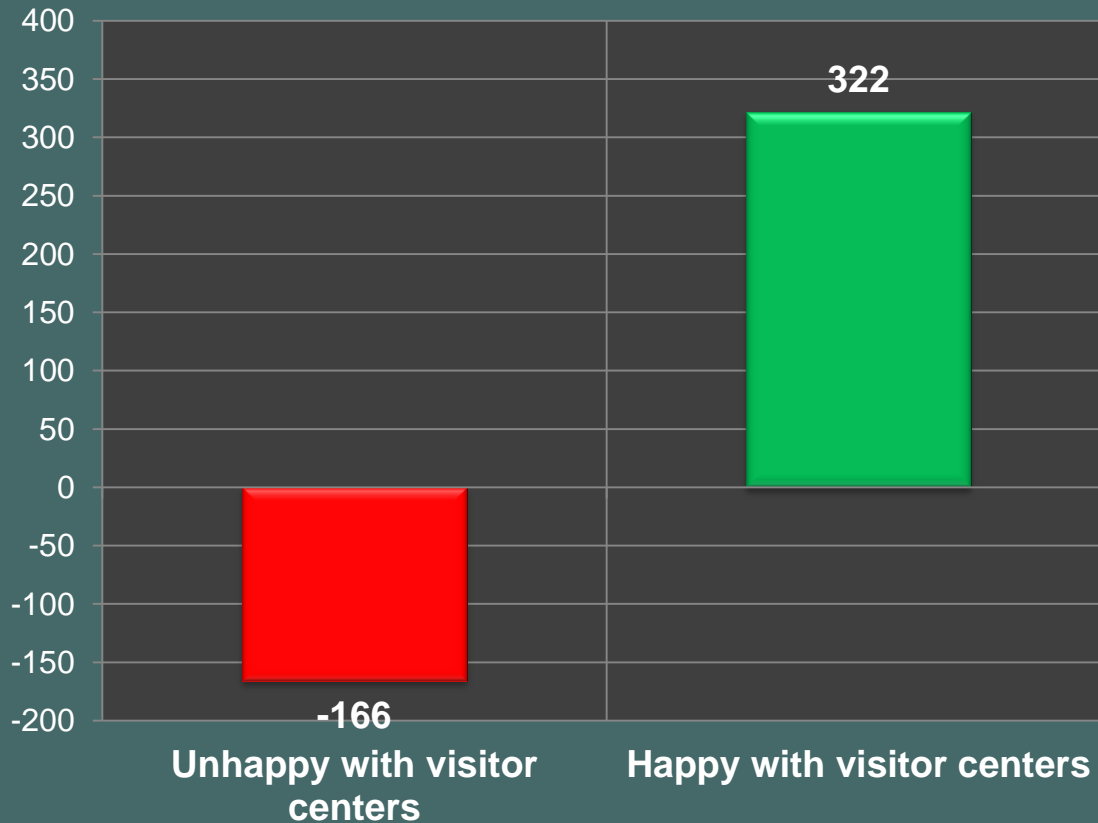
Satisfaction with Digital Hospitality per age *Average All Destinations*



ACTING ON THE RIGHT CHANNELS



Satisfaction with Digital Hospitality Average All Destinations



Purpose of visit	
Leisure	114
VFR	128
Education	100
Medical	96
Religion	27
Honeymoon	172
Shopping	171
MICE	156

(Last minute) TAKE AWAYS...

1. Before acting on **authenticity and digital...make sure about the basics**
2. Do not use apps for hiding the rest !...
3. Apps **speak all languages**, are available **24/7** (and do not go on strikes)
4. How many **truly content relevant apps** ?...
5. The right app at the right time and the right place...**what about DMO's role ?**
6. Apps can help improving hospitality and **access to authenticity**
...but does not replace it
7. Finding the right balance btw **digital and human based hospitality**



Global Competitive Data

For a Global Competitive Tourism

Is your destination competitive ?

TCI Research (Tourism Competitive Intelligence) is the **first UNWTO awarded agency** fully specializing in survey-based tourism research and destination rating. Our mission is to help destinations of all sizes **improve their competitiveness** through a better understanding of travellers' opinion and demand. We collect a range of unique, reliable, comparable and independent data and insights combining advantages of traditional and Big Data analysis, for working along with destinations and tourism stakeholders on their marketing issues related to travelers' experience and satisfaction, destination reputation management, branding and communication.

request@tci-research.com

www.tci-research.com

