ForwardKeys
Know tomorrow's travellers

Caribbean Tourism Organization

2017 year-to-date (Jan-Oct.)
&
Forward looking for next 6 months

A focus on Travel Agencies
Air reservation

WTM - November 2017

SERVING

MARKETS COVERED

- Retailers
- Financials
- Travel distribution
- Destinations
- Theme parks
- Retail brands
- Hospitality
- Airports
- Media
- Tax refund
- Duty free
- Developing markets

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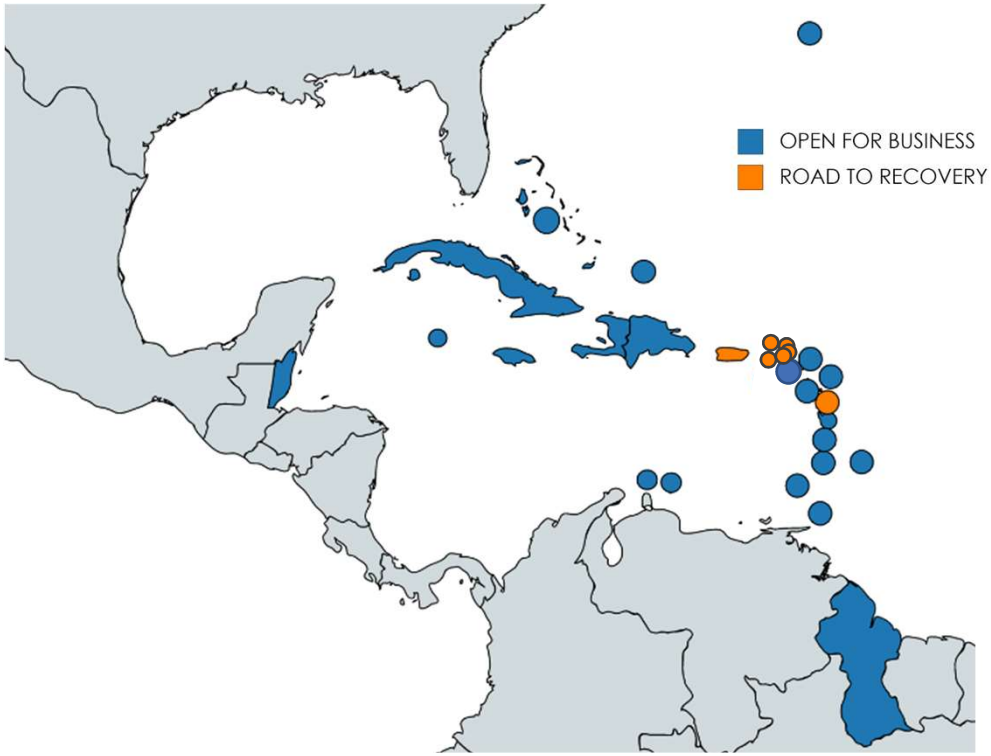
Caribbean destinations after the 2017 hurricanes season



Source: mapchart.net

OPEN FOR BUSINESS		ROAD TO RECOVERY
Antigua	Aruba	Anguilla
the Bahamas	Barbados	British Virgin Islands
Belize	Bermuda	Dominica
Bonaire, St. Eustatius, Saba	Cayman Islands	Puerto Rico
Cuba	Curaçao	Saint Martin
Dominican Republic	Grenada	Sint Maarten
Guadeloupe	Guyana	U.S. Virgin Islands
Haiti	Jamaica	
Martinique	Montserrat	
Saint Lucia	Saint Barthelemy	
St. Vincent and The Grenadines	St. Kitts and Nevis	
Turks and Caicos	Trinidad and Tobago	

"The Caribbean" in this study refers to all destinations "Open for business".

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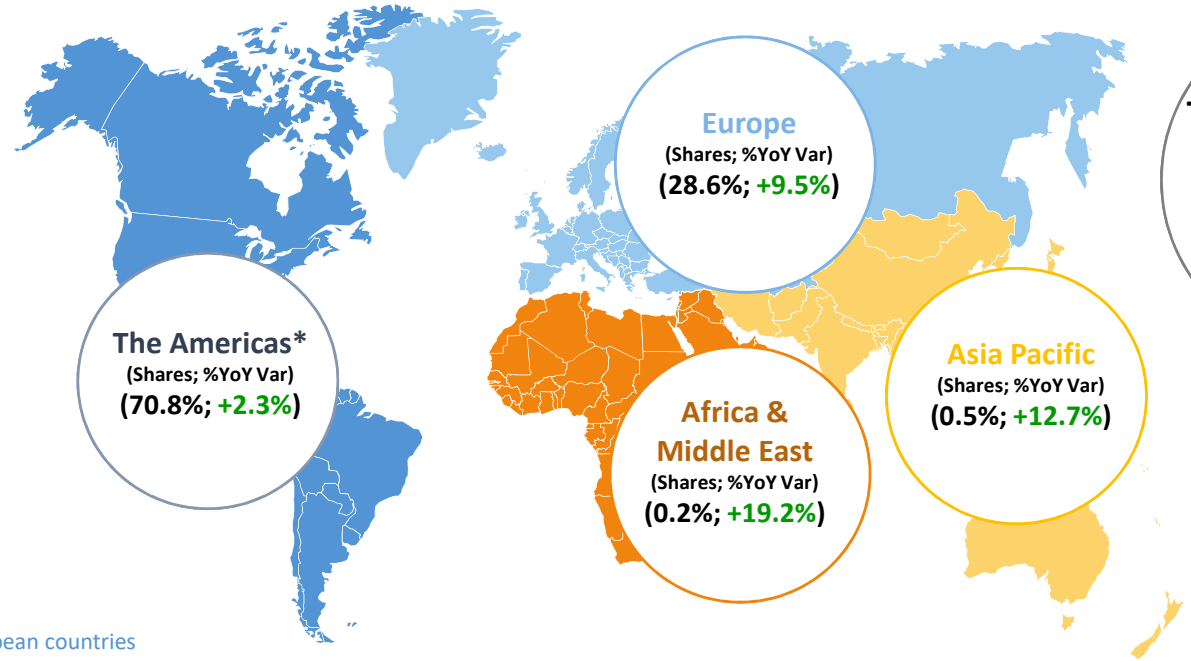
Solid growth seen YTD from international* arrivals in the Caribbean

2017 Year to Date international arrivals in the Caribbean by origin continent, YoY variations



Total International* to the Caribbean
(Shares; %YoY Var)
(100%; +4.3%)

*excludes the Caribbean countries

Arrivals in countries open for business between 1st January and 31st October 2017 compared with 1st January and 31st October 2016.

Only considered visitors staying 4 to 21 nights in Caribbean country.

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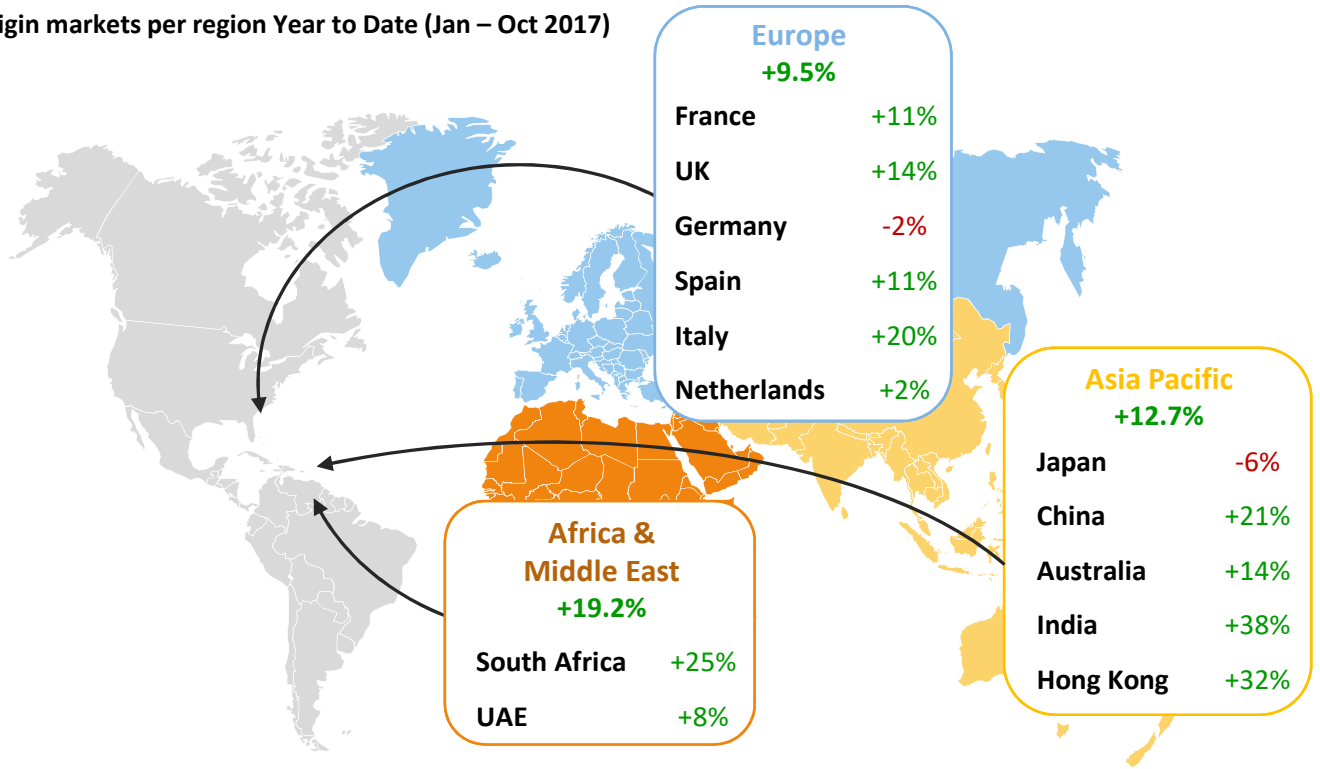
Top performing long-haul origin markets

Top long-haul origin markets per region Year to Date (Jan – Oct 2017)



Arrivals in countries open for business between 1st January and 31st October 2017 compared with 1st January and 31st October 2016.

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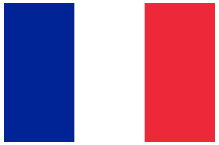
Top performing destinations in the Caribbean

Top 5 growing Caribbean destinations Year to Date

Barbados
+18.3%

Cuba
+17.0%



Guadeloupe
+10.8%

Aruba
+8.4%

Haiti
+8.2%

Arrivals in countries open for business between 1st January and 31st October 2017 compared with 1st January and 31st October 2016.

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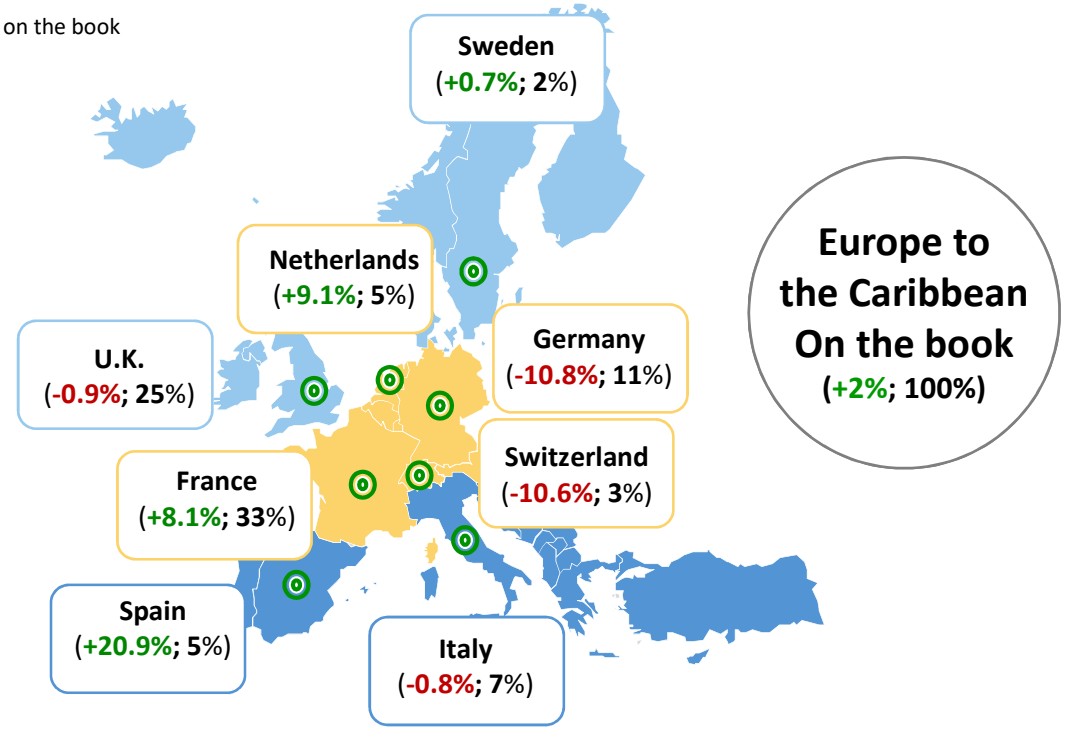
European travel to the Caribbean to continue its growth in the next 6 months

Forward looking European arrivals in Caribbean for the next 6 months (November 2017 – April 2018)

Only countries with >1% shares on the book

(YoY var.%; shares)



On the Book to countries open for business between 1st November 2017 and 30th April 2018 compared with 1st November 2016 and 30th April 2017.

Only considered visitors staying 4 to 21 nights in Caribbean country.

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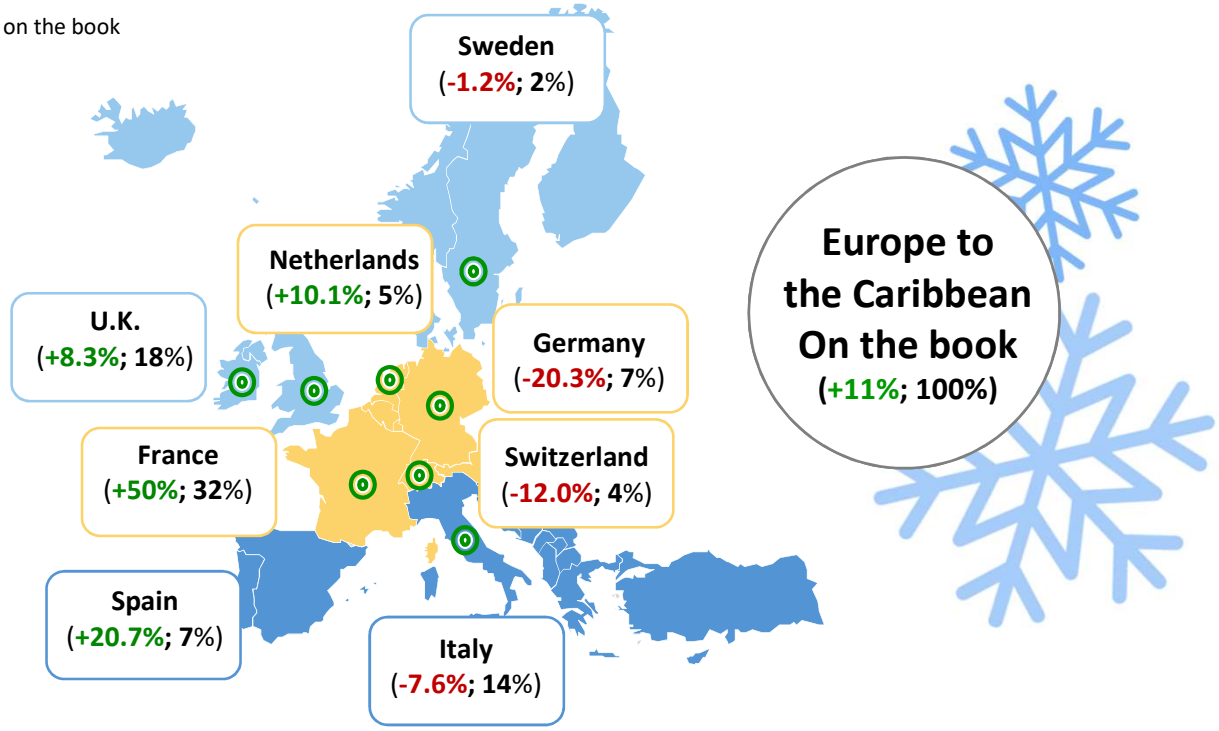
Christmas season looking very promising

Forward looking European arrivals in Caribbean for Christmas Period

Only countries with >1% shares on the book

(YoY var.%; shares)



On the Book to countries open for business between 22nd December 2017 and 4th January 2018 compared with 23rd December 2016 to 5th January 2017.

Only considered visitors staying 4 to 21 nights in Caribbean country.

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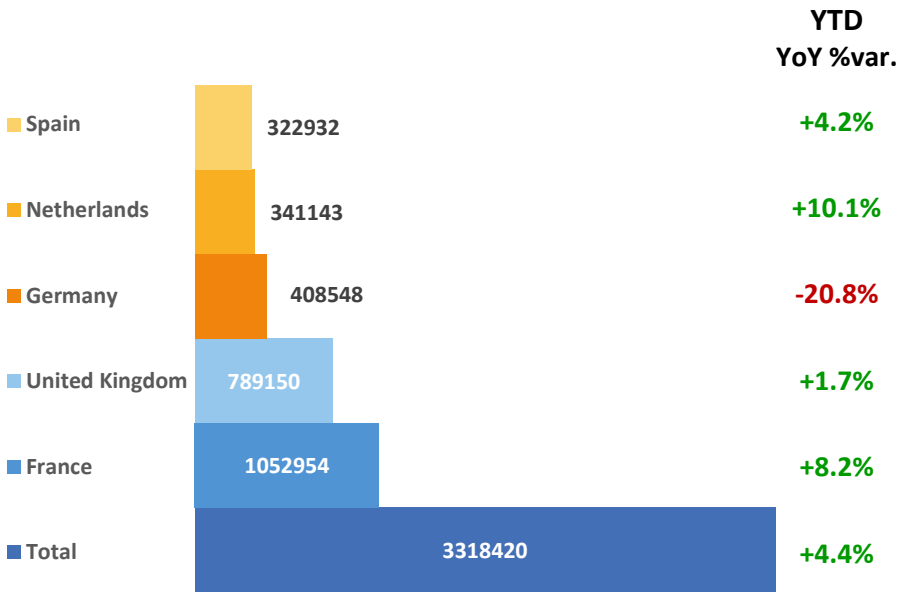
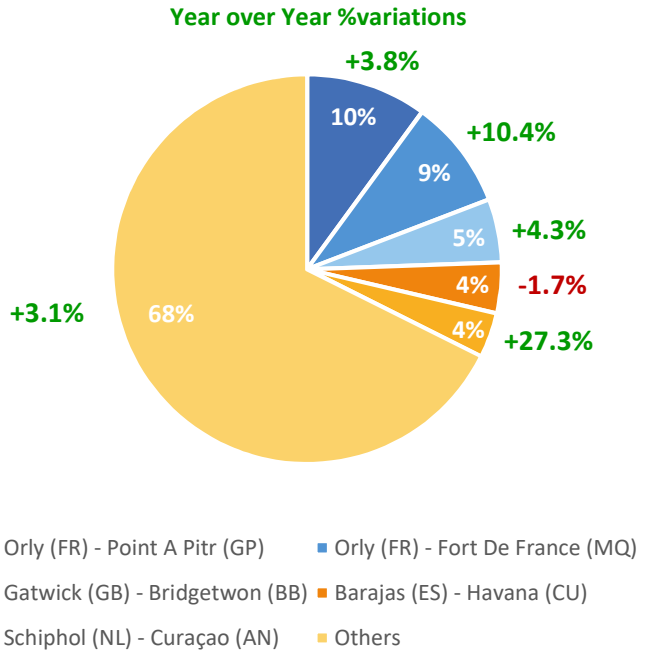
Scheduled seat capacity from Europe for the next 6 months growing

Scheduled seats from top European origins to Caribbean for the next six months (November 2017 – April 2018)



Top 5 routes between Europe and Caribbean for the next six months (November 2017 – April 2018)



Arrivals Capacity to countries open for business between 1st November 2017 and 30th April 2018 compared with 1st November 2016 and 30th April 2017.

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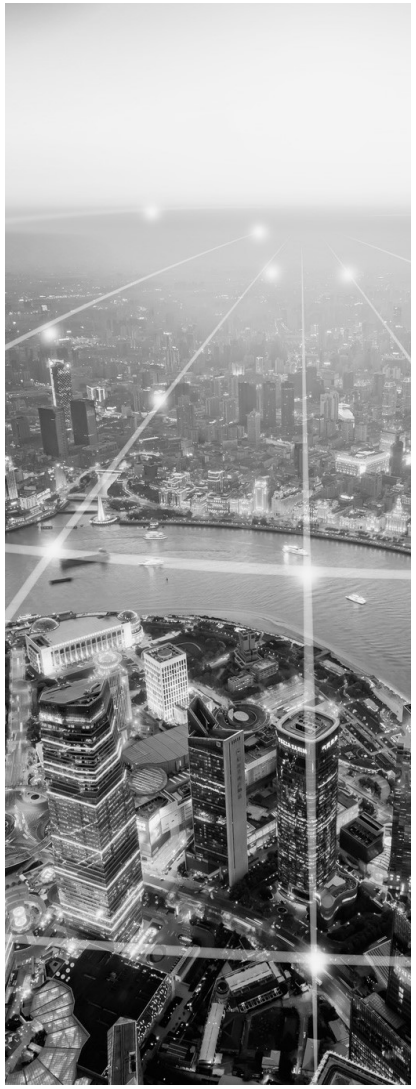

MAIN FINDINGS

- **Total international arrivals booked through travel agencies** in the Caribbean welcomed a year-to-date increase of **+4.3%**. Above average growth was seen from Europe (+9.5%), Asia Pacific (+12.7%), and Africa and Middle East (+19.2%).

- Beyond the Americas, **the Caribbean is connected to UK, France, the Netherlands, Spain and Germany with regularly scheduled direct flights.** Year-to-date scheduled capacity from the European countries showed strong growth year to date.

- **More than half of European travellers took direct flights to the Caribbean.** Travellers from Asia Pacific and Middle East, having to transit, chose Toronto, Miami, New York City, Moscow, and Paris as the top transit hubs to reach the Caribbean.

- **Forward bookings from Europe to the Caribbean** are **+2%** ahead of last year's booking situation for the next 6 months, and **+11%** ahead for the Christmas and New Year period (December 22nd 2017 to January 4th 2018).

- **Scheduled capacity to the Caribbean** is seeing **double-digit growth** from all European origins except Germany for the next 6 months. Capacity from France is scheduled to increase by **10.1%**.

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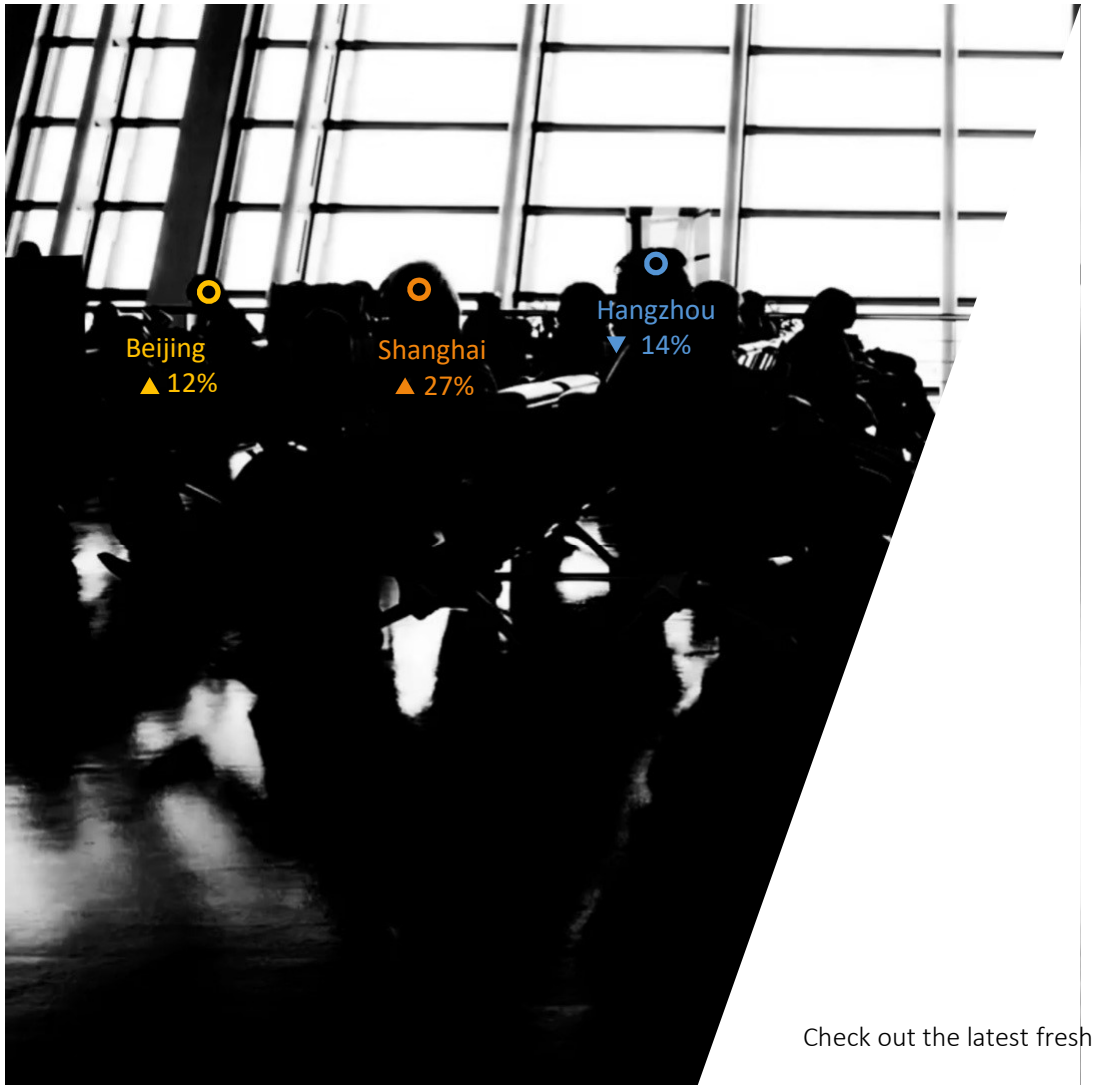

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