Caribbean Tourism Organization

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

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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
**Caribbean destinations after the 2017 hurricanes season**

**OPEN FOR BUSINESS**
- Antigua
- the Bahamas
- Belize
- Bonaire, St. Eustatius, Saba
- Cuba
- Dominican Republic
- Guadeloupe
- Haiti
- Martinique
- Saint Lucia
- St. Vincent and The Grenadines
- Turks and Caicos

**ROAD TO RECOVERY**
- Aruba
- Barbados
- Bermuda
- Cayman Islands
- Curaçao
- Grenada
- Guyana
- Jamaica
- Montserrat
- Saint Barthelemy
- St. Kitts and Nevis
- Trinidad and Tobago

*“The Caribbean” in this study refers to all destinations “Open for business”.*/

**Source:** mapchart.net
Solid growth seen YTD from international* arrivals in the Caribbean

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

- **Europe** (Shares; %YoY Var) (28.6%; +9.5%)
- **The Americas*** (Shares; %YoY Var) (70.8%; +2.3%)
- **Africa & Middle East** (Shares; %YoY Var) (0.2%; +19.2%)
- **Asia Pacific** (Shares; %YoY Var) (0.5%; +12.7%)
- **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.
Top performing long-haul origin markets

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

Europe
+9.5%
- France +11%
- UK +14%
- Germany -2%
- Spain +11%
- Italy +20%
- Netherlands +2%

Africa & Middle East
+19.2%
- South Africa +25%
- UAE +8%

Asia Pacific
+12.7%
- Japan -6%
- China +21%
- Australia +14%
- India +38%
- Hong Kong +32%

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.
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%
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)

- **U.K.** (-0.9%; 25%)
- **Sweden** (+0.7%; 2%)
- **Netherlands** (+9.1%; 5%)
- **France** (+8.1%; 33%)
- **Germany** (-10.8%; 11%)
- **Switzerland** (-10.6%; 3%)
- **Spain** (+20.9%; 5%)
- **Italy** (-0.8%; 7%)

Europe to the Caribbean
On the book
(+2%; 100%)


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

Europe to the Caribbean
On the book (+11%; 100%)

- Spain (+20.7%; 7%)
- France (+50%; 32%)
- U.K. (+8.3%; 18%)
- Netherlands (+10.1%; 5%)
- Germany (-20.3%; 7%)
- Sweden (-1.2%; 2%)
- Switzerland (-12.0%; 4%)
- Italy (-7.6%; 14%)

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.
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)

Year over Year %variations

- Orly (FR) - Point A Pitre (GP)
- Orly (FR) - Fort De France (MQ)
- Gatwick (GB) - Bridgetwon (BB)
- Barajas (ES) - Havana (CU)
- Schiphol (NL) - Curaçao (AN)
- Others

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%**.
GET IN CONTACT!

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