

# Caribbean Travel Trends Report

MAY 2023



CARIBBEAN  
HOTEL & TOURISM  
ASSOCIATION

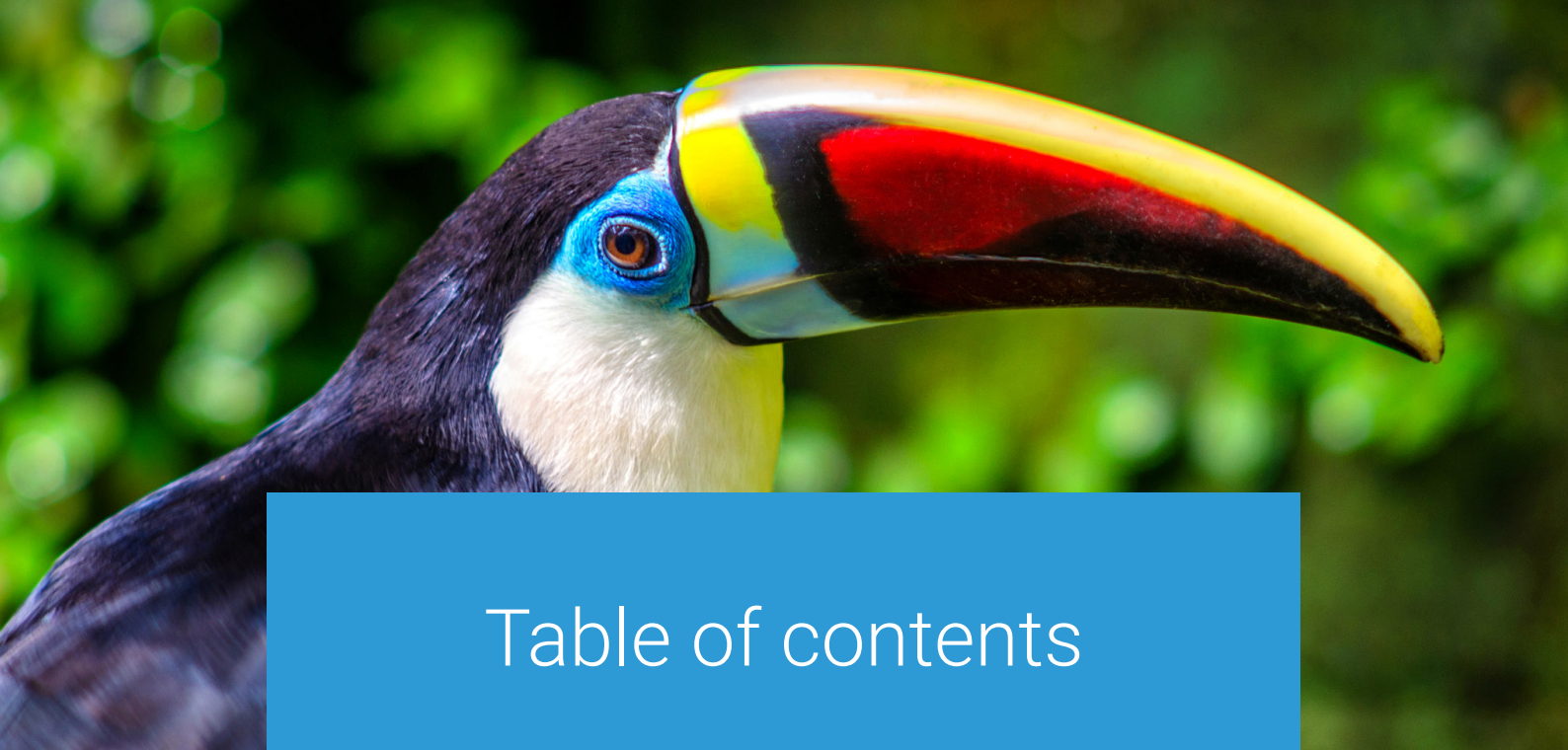


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The data included in this document is accurate according to ForwardKeys' market research database as of 5th April 2023.



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# Foreword

ForwardKeys has been pioneering Big Data solutions for the tourism and hospitality industry since its inception in 2010. Likewise, the Caribbean Hotel & Tourism Association (CHTA) has played an integral role in the region, before, during and now after the pandemic. We both have been monitoring the progress and development of the travel sector across the Caribbean and enjoyed seeing how the travel offers have widened and taken more of a sustainable tourism turn. As such it makes sense for us to unite as partners and share the latest travel figures.

During the pandemic, as many of the global regions panicked and sent out mixed messages to the world about travel requirements, the Caribbean nations stood out with their clear and consistent messages about Covid-19 precautions and entry requirements. As such, some of the islands became shining examples of how to promote tourism during a crisis – our case studies show that later in this report.

Together we chose to encourage destinations forward, armed with the latest travel data to monitor travel trends, help improve flight connectivity, target current and new audiences, and measure the impact of events.

Fast forward to an exciting travel era, 2023, and it is the Caribbean yet again leading the way for travel recovery with many regional destinations growing over 2019 levels. Uncover the arrival figures for the first half of 2023, including insights on Easter and Summer travel, and make sure to rely on ForwardKeys' data for future-proofing your next tourism strategy.



**Olivier Ponti**  
Vice President – Insights  
**ForwardKeys**



**Nicola Madden-Greig**  
President  
**The Caribbean Hotel & Tourism Association**



# The Caribbean movers and shakers in Q1

## International worldwide arrivals in Q1 2023; vs 2019 levels

<b>The Americas</b> <small>excl. Caribbean</small>	<b>Caribbean</b>	<b>Europe</b>	<b>Africa &amp; Middle East</b>	<b>Asia Pacific</b>	<b>Total International Traffic</b>
<b>-22%</b>	<b>-1%</b>	<b>-25%</b>	<b>-7%</b>	<b>-52%</b>	<b>-31%</b>

Source: ForwardKeys Air Tickets Data

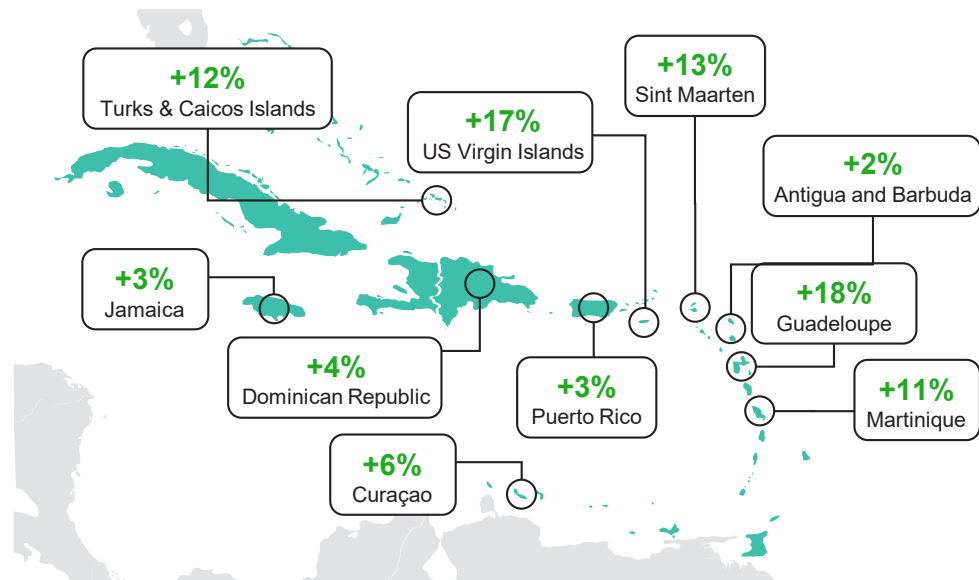
The Caribbean was back to pre-pandemic levels of international visitor arrivals in Q1 of 2023, down by just 1%. An amazing feat considering the context of global international travel, still down by 31% against 2019.

The world is a more competitive place for the tourism industry, now that most COVID-19 requirements and restrictions are over; while the reopening of China represents the dawn of a new era where COVID-19 seems finally in the rear mirror.

Consequently, the travel landscape is more competitive now that travellers have more choices, and due to pent-up demand for destinations that were previously off-limits or less accessible (South America, Southeast Asia). 2023 could be considered the first year without COVID19 for the tourism industry. The Caribbean destinations achieved a leadership position in the last years, now it is time to sustain it.

What is even more encouraging is that the latest air ticketing data from ForwardKeys shows that several destinations within the Caribbean have now switched to growth mode. Guadeloupe, US Virgin Islands, Sint Maarten, Martinique, and Turks & Caicos Islands are all in double-digit growth compared to the same period in the pre-pandemic.

## Overseas arrivals in Caribbean destinations in Q1 2023; vs 2019 levels



Source: ForwardKeys Air Tickets Data

North American visitors heavily contributed to some of the positive arrival figures. Some destinations, like the Turks & Caicos Islands experienced growth of both US and Canadian travelers over 2019 levels.

Canada is having a comeback, so it is one to watch as the incoming figures will build up as flight connectivity and demand increase.

The two markets also showed preference for different destinations. The fastest growing destinations for Canadians were Aruba, Turks & Caicos Islands, and Barbados, while US travellers chose Jamaica, Turks & Caicos Islands, and the Dominican Republic. It is a case of apples and oranges when dealing with the North American market, one shape does not fit them all.

Beyond the main traditional markets, the US and Canada, there are more opportunities to be found in the neighbouring countries. Latin American markets represent an exciting opportunity for the Caribbean. Travel demand for Caribbean destinations quickly gained momentum after most regional countries dropped travel requirements. The strong pent-up demand is propelling visitor arrivals from Latin America beyond pre-pandemic levels, up by 14% in Q1, and with greater growth potential. The best-performing markets in the region are Colombia, Argentina, and Peru.

**Overseas arrivals in Caribbean in Q1 2023; vs 2019 levels**

ORIGIN MARKET	Var vs 2019
<b>Latin America</b>	<b>+14%</b>
Colombia	+48%
Peru	+21%
Argentina	+15%
<b>North America (excl. Mexico)</b>	<b>+2%</b>
U.S.A.	+5%
Canada	-13%
<b>Europe</b>	<b>-20%</b>
Netherlands	+8%
France	-7%
Spain	-10%

Source: ForwardKeys Air Tickets Data



# The emerging Latin American markets: opportunities & challenges

## Revenge travel

Latin American travellers are keen to take a flight to the sparkling azure shores of the Caribbean. After enduring a long period of COVID19-related restrictions, the much-needed source of relaxation can be found in the Caribbean.

Revenge travel is not just a buzzword. It is a reality, as evidenced by the strong demand for premium cabin classes. In other words, Latin American travellers are willing to splurge on premium flight tickets - and therefore, they are also likely to spend extra on travel services while at the destination.

The Latin American markets with the most outstanding increases in demand for premium flight tickets are Ecuador, Peru, Colombia, Mexico, and Argentina. The destinations winning over this affluent segment the most are Curaçao, the Dominican Republic, Jamaica, and the Bahamas.

## Arrivals from Latin America to the Caribbean in Q1 2023; vs 2019 levels

Arrivals in economy cabin classes  
+9%

Arrivals in premium cabin classes  
+87%

ORIGIN MARKET	Var vs 2019
Ecuador	+432%
Peru	+232%
Colombia	+211%
Mexico	+104%
Argentina	+101%

DESTINATION	Var vs 2019
Curaçao	+110%
Dominican Republic	+95%
Jamaica	+90%
Bahamas	+50%

Source: ForwardKeys Air Tickets Data





### The challenges of flight connectivity

The restoration of air connectivity is one of the key factors driving post-COVID-19 travel demand recovery, and Latin America is no exception. After years of limited travel activity, now Latin American travellers have fewer options to get to their desired Caribbean vacation. Fewer direct flights, and lower flight frequencies, make it harder and more costly to travel. In this scenario, connections with gateway airports are fundamental to remaining competitive.

In the current travel landscape, Panama City has emerged as a key gateway hub for Latin America, particularly, for connecting this region to the Caribbean. This is a result of a decided and successful strategy to transform Panama’s Tocumen International Airport into an intra-regional airport hub. Panama has become the first choice when transitioning to the Caribbean, gaining a share over other regional airports, such as Bogota, Lima and Miami.

While it is not always feasible to develop direct flight connections with emerging markets, establishing regular and frequent connections with the right network airports is fundamental for reaching a more diverse travel audience.

### Arrivals from South America to Caribbean in Q1 2023; vs 2019 levels



# Easter travel: A health check for the region

Easter break is a key travel period for many Caribbean destinations and a good occasion for a health check for the travel industry. The results during this period – the school holidays in most markets are between the end of March and the first fortnight of April 2023 - might be a good indicator of what to expect in the year ahead.

During the Easter break international tourist arrivals in the Caribbean are up by 5% against the equivalent holiday period in 2019. Among the top destinations, the best-performing ones were the Dominican Republic, Turks & Caicos Islands (both at +21%), Guadeloupe, Martinique (both at +16%), Puerto Rico (+15%) and Jamaica (+13%).

The outstanding performance of these destinations is testimony of the robust demand from two key markets: the US, which is the dominant market for Turks & Caicos Islands and Puerto Rico; and France, the dominant market for Guadeloupe and Martinique. It is worth mentioning that Guadeloupe managed to diversify its visitor mix and attract a greater proportion of Canadians this year.

## Overseas arrivals in Caribbean during Easter break 2023 (between 31 Mar and 10 Apr 2023)

### ARRIVALS FROM

#### North America (excl. Mexico)

-  Average pax per booking **4 pax**
-  Average length of stay **7 days**
-  Average lead times **82 days**

#### Latin America

-  Average pax per booking **4 pax**
-  Average length of stay **7 days**
-  Average lead times **66 days**

#### Europe

-  Average pax per booking **4 pax**
-  Average length of stay **11 days**
-  Average lead times **92 days**

Source: ForwardKeys Air Tickets Data



Top markets maintained a similar performance to the first quarter. Latin American markets maintained a strong demand for the Caribbean during the Easter break, 20% above 2019 levels. Colombia (+41%), Brazil (+37%) and Argentina (+15%) stood out as the fastest-growing markets in the region.

US travellers taking advantage of the spring break holiday grew by 11%. The double-digit growth rate confirms the decent shape of demand in this key market that thrived in recent years. This year, Canada joins in with an increase of 5% over 2019 in tourist arrivals. This indicates that, after leaving behind strict COVID-19 regulations and reestablishing direct flight links with the region, Canadian travellers are making their comeback to the Caribbean beaches in 2023.

On the other hand, the performance of the European markets (-23%) was not as positive and revealed some industry challenges. Firstly, connectivity bottlenecks caused by reduced seat capacity from some major markets (France, Germany, Netherlands, Italy, Switzerland) and strikes impacting airlines and airports during peak season (most significantly France, Britain, and Germany).

Secondly, an increase in air fares is caused by limited connectivity and rising operating costs of airlines. When combined with the deterioration of disposable income due to inflation, European travellers were more inclined towards more affordable, short-distance trips.

Nevertheless, the results differ among different markets and some of them, like the United Kingdom (+2%), maintained a resilient performance despite the headwinds.

## Family trips, more spontaneous from Latin America

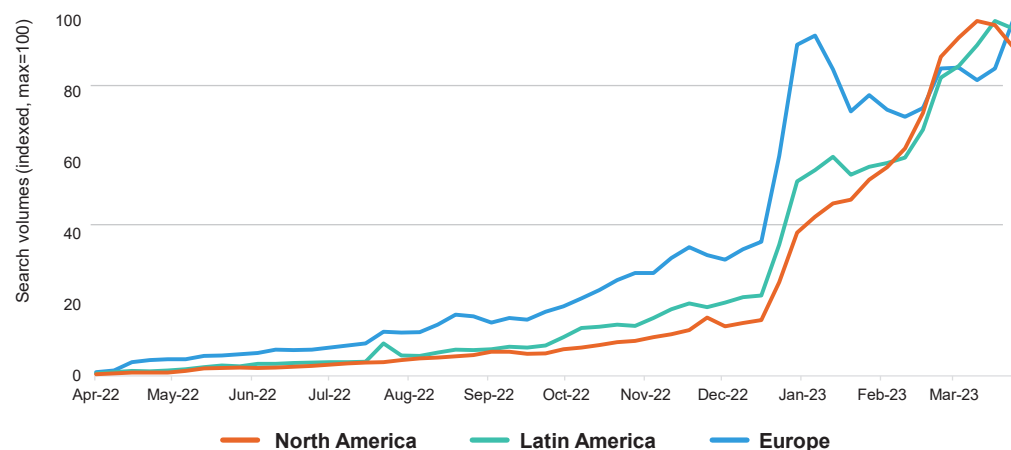
Examining the traveller profiles during the Easter holiday break reveals differences in booking patterns.

During this period, travellers from different origins share one common pattern: the average size of the group is 4 travellers. Not a surprise, considering this holiday break corresponds with a school holiday. The duration of the stay is similar for travellers from the US, Canada, and Latin America, one week on average. However, European families prefer to extend their stay to 11 nights on average. This might be as well the reason they plan their trip with more anticipation: to save on additional travel costs.

Europeans booked their Caribbean Easter holiday with 92 days (about 3 months) of anticipation, which reveals longer planning times than North Americans, 82 days (about 2 and a half months on average). Latin Americans show the most spontaneous behaviour, booking only 66 days (about 2 months) ahead of their trip.

Europeans start dreaming of the Caribbean holiday as soon as the year starts with flight searches peaking in early January, with a high level of interest in the entire Q1. This means travel operators, hoteliers and tourism boards need to re-consider when they launch their marketing campaigns, loyalty programs and early bird offers. Timing is crucial.

## Flight searches for Easter 2023 travel in the Caribbean from overseas markets



Source: ForwardKeys Flight Search Data

# Spring & Summer outlook

Summer 2023 is gearing up to be a sizzler in the Caribbean as the growth over 2019 levels is expected to surpass the performance during the spring season. Bookings for travel during the spring period (March to May) are ahead by 4%, while bookings for northern hemisphere Summer season (June to August) are ahead by 10% over 2019 levels. This just confirms the continual year-round appeal of the Caribbean.

*“The pandemic sparked a major rethink about the Caribbean as a year-round destination,”* says Simon Neggers, Senior VP of Sales, Marketing, and Communications at Oetker Collection, which includes the luxury Jumbo Bay Island Resort in Antigua and Barbuda and Eden Rock St Barths. *“Sure, it’s a little hotter, but in general it is the perfect beach weather.”* The initial spark came when Americans could not travel to Europe for summer vacations, Neggers adds.

In 2022, Turks and Caicos Islands’ the Sands, the Palms, and the Shore Club *“experienced an entire year of almost no downtime. There was no seasonal break,”* says Karen Whitt, VP of Sales and Marketing at Hartling Group.

These changes in travel patterns will ensure a year-round flow of tourists, which means more jobs and revenue stability in the region.

## Overseas forward bookings for travel to the Caribbean



**SPRING 2023**

**+4%**

March - May 2023 vs 2019



**SUMMER 2023**

**+10%**

June - August 2023 vs 2019



*Over the past several decades we have seen the Caribbean successfully morph from being a just winter destination, to a year-round destination offering a broader and diverse appeal to discerning travelers. Strategies to support this have included widening our target audience, offering value-oriented promotions, creating and marketing new products and services including but not limited to festivals, events and activities. We have also focused on leveraging more than just our natural assets of sun, sea and sand and have moved to celebrate authenticity in our culture, food, music and experiences. This was coupled with expanding both company level and destination marketing.*

**Nicola Madden-Greig**, President  
Caribbean Hotel and Tourism Association



Source: ForwardKeys Air Tickets Data



# Caribbean success stories

# Aruba's successful journey: From recovery to growth

## Heart, soul and diligence...keys to success

With deep integration between the Aruban Government, the Aruba Tourism Authority, the Aruba Hotel and Tourism Association, the Aruba Airport Authority and other public and private stakeholders, Aruba developed and implemented effective protocols and systems to support a successful reopening and recovery to growth strategy.

While all paid media was initially halted, we connected regularly with our 'Happy Returners' to the 'Happy Island', knowing they would be the first to return and would serve as effective ambassadors for recovery. Focus was placed on utilizing 'owned' assets with aruba.com as the definitive hub for Covid-related updates, safety procedures and travel protocols. Multiple tactics were employed through social media channels, eCRM, YouTube and more. Our initial integrated media mantra was "Happiness will Prevail."

To launch, we created a moving video as a message of hope, voiced by a tapestry of Arubans. Hundreds of content pieces kept Aruba and its loyalists #TogetherWhileApart. A "30 Minutes of Happiness" montage of Aruba sights and sounds transported viewers to a happy place while sheltered-in-place.

## Open for happiness...with safety, sanctuary and savings

When borders re-opened, we confidently announced that Aruba was "Open For Happiness." Key messaging pillars focused on:

**Safety:** Content and a landing page were made for the Aruba Health & Happiness Code, highlighting businesses that achieved the government's rigorous hygiene certification. A Traveler Safety Journey landing page and videos with safety tips and guidance was also created, featuring Aruba's Prime Minister, Minister of Tourism, local personalities and a host of locals.

**Sanctuary:** Videos and landing pages expressed why Aruba is perfect for the pandemic-weary visitor featuring open spaces and long stretches of white sand to reconnect with themselves and nature.

**Savings:** "Welcome Back" deals and promotions were created including a very successful campaign to promote extended-stay "Workation" programs and packages. We also created the Aruba Happily Ever After Guarantee, the Caribbean's first postponable booking policy for weddings or honeymoons in 2021.

## Travel protocols and policies

Stakeholders collaborated on all entry procedures, protocols and subsequent information dissemination across necessary outlets and partners. Aruba's online Embarkation/Disembarkation Card (ED Card) was adapted to include Covid entry requirements and travel protocols, including requisite health questions, uploading proof of PCR test, and a link to purchase a mandatory Aruba Visitors Insurance.



### Citizen and industry well-being

Measures were enacted including: subsidies for businesses covering portions of employee salaries, unemployment assistance programs, and food subsidies. The government rapidly secured vaccines and provide information and guidance to its citizens. Roughly 85% of the populace was quickly vaccinated. Public education initiatives promoted cleanliness, mask usage, social distancing, etc. Webinars helped businesses understand protocols and procedures to support their reopening.

The Aruba Hotel & Tourism Association distributed their “Best Practices” guide to hotels, elevating existing cleaning protocols to new standards for all areas including luggage handling, elevator safety, housekeeping, food & beverage service, casinos and more. Corresponding measures included plexiglass barriers at desks, digital keys, contactless check-in, thorough disinfecting of public spaces and rooms, and more.

### Crisis communication

A crisis response strategy was developed and implemented and included:

- ▶ Daily news reports for the industry, marketing agencies, travel agents, co-op partners, etc.
- ▶ Ever-evolving FAQ content leveraged across Aruba.com and customer care inquiries
- ▶ Draft messaging for communication with hotel partners, stakeholders, international partners including airlines, tour operators and the public
- ▶ Messaging and status reports on resident COVID-19 cases, hospitalizations and vaccinations
- ▶ Sharing ongoing Tourism Recovery Marketing Plans

### Innovative solutions and partnerships

These approaches resulted in...

- ▶ **Aruba's health & happiness code** - a stringent cleaning and hygiene certification program with seal mandatory for all tourism-related businesses.
- ▶ **Securing the world travel & tourism council “safe travels” stamp** recognizing governments, destinations and companies adopting global hygiene and safety protocols endorsed by WTTC and in accordance with WHO, CARPHA and CDC guidelines.
- ▶ **Updating the online embarkation/disembarkation card process**
- ▶ **Establishing aruba visitors insurance** giving visitors even more peace of mind
- ▶ **Launching the Aruba health app.** In efforts to keep visitors well-informed
- ▶ **Partnering with JetBlue & CommonPass**
- ▶ **Pioneering a collaboration with Ok2Roam** allowing travelers to authorize an approved laboratory to securely send their negative test result directly to Aruba's ED Card platform.

### Recovery: by the numbers

**Airlift:** Seat capacity of 79% was achieved by the end of 2021 compared to 2019. By end of 2022 seat capacity was 103% from the U.S., and 111% from Europe vs 2019.

**Visitation:** In 2022 Aruba registered a recovery of 98.4% of global stayover visitors vs. the 2019 level. By 2023 it is expected the global recovery will be 105% of the 2019 level.

**Tourism receipts:** the realistic expectation Estimated 2022 tourism receipts show a recovery of 112% and a forecasted recovery of 117% in 2023 vs. 2019.

**Cruise:** the estimated 2022 recovery will be 63% vs. 2019. 2023 projections show cruise visitation at 90% vs. 2019.

# Saint Lucia's successful recovery: Collaboration is key

Saint Lucia's recovery from the crippling pandemic would not have been attained without persistent collaboration. The Saint Lucia Hospitality and Tourism Association (SLHTA) formed strategic alliances with various governmental departments, private sector bodies and civil society groups including the Ministries of Tourism and Health, Saint Lucia Tourism Authority (SLTA), St Lucia Air and Sea Ports Authority (SLASPA), Royal Saint Lucia Police Force (RSLPF), Chamber of Commerce and Manufacturers Association, Lions Club of Gros Islet and Rotary Club of Saint Lucia.

The Association sat as the Private Sector Representatives on the National Emergency Management Advisory Committee (NEMAC)—a committee tasked with responding to national emergencies which researched and recommend various protocols to respond to the pandemic.

## Industry's commitment to health safety drive reopening

The country reopened its borders in June 2020 with strict protocols to ensure the safety of visitors, returning nationals and employees in the tourism sector. A health screening form, negative test requirements and confinements to COVID-19 approved areas were measures that formed part of the response. The entry process was facilitated online allowing travelers to upload forms and negative test results directly to the Tourism Authority. The reopening was a massive success and thousands of displaced tourism workers resumed earning a living. The protocols were slowly eased as vaccination rates increased and in September 2022 all COVID-19 related entry requirements were removed.

**SAINT LUCIA TRAVEL SAFETY PROTOCOLS**  
Saving Lives and Livelihoods

Here are some of the protocols that have been put in place to protect those traveling to Saint Lucia and Her citizens

**YOU MUST FOLLOW THESE PROTOCOLS THROUGHOUT YOUR STAY IN SAINT LUCIA**

- 1 BEFORE YOU TRAVEL**
  - Complete and submit your Pre-Arrival Registration Form online at [www.stlucia.org/covid-19](http://www.stlucia.org/covid-19)
  - Take a PCR Test no more than 7 days before travel and receive confirmation of a negative test result.
- 2 AT THE ARRIVAL AIRPORT**
  - Don't forget to wear your mask
  - Follow the directions of the ground staff and signage
  - Observe Physical distancing
  - Hand hygiene (handwashing and sanitization)
  - Temperature screening (symptomatic travelers will be isolated)
  - Registration forms (printed copy)
  - Negative PCR Test Result
  - Authorized (COVID-19 Certified) Taxis only
- 3 AT THE HOTEL**
  - COVID 19 certified taxis only booked by hotel (PPE, Sanitation and Social Distancing cashless transaction protocols in place)
  - COVID 19 certified hotel
  - Limited contact check in and check out
  - Guests temperature checks at meal times
  - Nurse's station on site
  - Quarantine facilities
  - Daily temperature checks for staff (at beginning and end of shifts)
  - Physical distancing
  - Guests are required to remain at their hotel for the duration of their stay. Please consult with your hotel for available activities and tours
- 4 DEPARTURE AIRPORT**
  - Masks
  - Physical distancing
  - Handwashing and hand sanitization
  - Departure lounge rearranged to allow for social distancing
  - Passport bio-page and departing flight details on hand
  - Only departing guests will be allowed into terminal building

WELCOME TO SAINT LUCIA

6 FEET

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LET HER INSPIRE YOU

Government of Saint Lucia

For more information scan code or visit: [stlucia.org](http://stlucia.org)

Updated 16 JUL 20 SLTA



The SLTA embarked on extensive marketing campaigns in the United States and United Kingdom, Saint Lucia's leading source markets. Leveraging the island's responsible resumption of tourism and handling of the pandemic, activities included:

#### **Readiness, marketing and PR strategies adopted at home and abroad**

The public and private sectors collaborated and complemented on-another to prepare for, attract, and welcome back visitors. Strategies included a resumption of a visiting journalist program; the launch of the 'She is Waiting' campaign; webinars for agents, operators and advisors, unveiling the 'She is Saint Lucia' film; and participation in the -World Travel Market.

Through the SLHTA's philanthropic arm the Tourism Enhancement Fund, we forged even closer ties with health officials and contributed to the acquisition of a: vaccine freezer, -pediatric electrocardiogram machine, Huntleigh SpO2 monitors, and -commercial washer.

Understanding the critical importance of information sharing, officials ensured the public was y engaged through daily press releases detailing positive/suspected cases, as well as frequent press conferences and national addresses. The SLHTA utilized social media platforms, in addition to a newsletter as a simple yet effective means to keep members updated.

#### **The SLHTA introduced a number of initiatives to assist in the island's recovery including a:**

- ▶ Partner with a Family Support Initiative for displaced hospitality workers
- ▶ "Eat What We Grow" campaign promoting healthy eating and the consumption of locally grown agricultural produce.
- ▶ Food vouchers for displaced restaurant workers
- ▶ After school education programs
- ▶ A vaccination encouragement campaign
- ▶ National Insurance Corporation cash payouts to thousands of displaced workers
- ▶ National hot meals program for employees of member companies and staff at the island's Respiratory Hospital
- ▶ Donation and distribution by private sector organizations of hand sanitizers to schools across Saint Lucia
- ▶ Donated backpacks to students
- ▶ Financed equipment and salaries for airport personnel to help process travelers
- ▶ Ongoing industry training and awareness sessions, helping member companies to achieve Government's health safety certification

# U.S. Virgin Islands' recovery: Collaboration, technology, training and communications

Recognizing the critical need to balance the return of tourism with the health safety of residents, U.S. Virgin Islands tourism stakeholders in the public and private sector collaborated extensively on a comprehensive strategy developed and continually adapted from the earliest stages of the pandemic.

The government worked quickly to implement COVID-19 protocols, curtailing many of the initial obstacles faced during the early days of the pandemic. Daily public and private sector meetings were held with the Department of Tourism, Department of Health, Government of the U.S. Virgin Islands, Hotel & Tourism Associations, and Chambers of Commerce to navigate safety protocols.

Many public and private sector organizations also quickly adapted to digital communication, holding training sessions and informational meetings via video chat. As protocols began to relax, the government worked with the Centers for Disease Control and Prevention, the Virgin Islands Port Authority, and airlines to welcome back cruise ships, bring unprecedented airlift to the territory, and support the marine industry.



## Policies and protocols adjusted as data warranted

The government also observed stages of recovery with incremental relaxation of policies that boosted the tourism industry by allowing restaurants options for reopening, the return of live entertainment, and small group activities. The Department of Tourism's travel portal added a critical digital element to assist those arriving to the territory in submitting COVID-19 test documentation and receiving clearance to enter the territory.

## Strong push made to vaccinate

After the U.S. Food and Drug Administration's approval of the COVID-19 vaccine but prior to mass distribution, the Hotel & Tourism Associations worked with the government to get vaccines for employees throughout the territory. This boosted employee confidence.

## Long-lasting impact from collaboration

As global travel returns, the USVI recognizes that the landscape of tourism has been forever altered. The public and private sectors was able to build upon its already strong public-private partnership and continues to work together to promote the territory and regularly monitor global health concerns.

## Working closely with airlines

The department and industry also worked closely with airlines to market the USVI as a convenient destination for U.S. citizens as a COVID-19 test would not be required for them to return to the mainland. Within 18 months, airlift capacity to the U.S.V.I approached record levels achieved 2019 pre-pandemic levels.



# How Bonaire future-proofed its tourism development plan

## The background

### Welcome to Bonaire

Bonaire is an island in the Leeward Antilles in the Caribbean Sea. Its capital is Kralendijk, near the ocean on the Lee side of the island. Aruba, Bonaire and Curaçao form the ABC islands, 80 km (50 miles) off the coast of Venezuela.

Bonaire is a popular snorkelling and scuba-diving destination because of its multiple shore-diving sites and easy access to the island's fringing reefs.

## The problem

### Information gaps hindering tourism development strategies

Tourism Bonaire was struggling information gaps that were hindering their business planning and tourism development strategies.

Future-proofing new ideas presented a challenge as it was led more by instinct than by scientific facts. Traditionally, the tourism organisation had planned campaigns based on historical data.

*"Data is key; without it, we can't strategise and plan. The partnership with ForwardKeys is just what we needed as it covers several areas including demographic profiles, segmentation, and seasonality. Most importantly, it provides us with the insight to anticipate market changes,"* says Miles Mercera, CEO of Tourism Corporation Bonaire.



*As CEO of Tourism Corporation Bonaire, I am often confronted with questions such as, 'How's the season picking up?', 'How are we ranked vs other competitors?', or 'What's our air service capacity like for the summer?'. I can now confidently showcase our direction and performance based on real-time data that is monitored and shared via ForwardKeys.*



**Miles Mercera**, CEO  
Tourism Bonaire



## The solution

### Insights and data on secondary and new markets

ForwardKeys provided insights and data on the secondary markets as well as the new markets that the tourist board was keen to venture into.

*"One of our goals for this chapter in tourism is to reposition the island. Exploring new markets can only be done with the data received from ForwardKeys. This is how we can see and analyse potential opportunities from areas in the world that previously we never evaluated as a potential source market,"* says Mercera.

*"With access to Destination Gateway, Bonaire has at its fingertips the possibility not only to understand how the destination is performing among the markets and travel audiences of its interest but also to assess how it compares with its competitors. The ability to access this type of information regularly on an easy-to-use dashboard is something the tourism organisation values greatly,"* says Lorena Garcia-Elices, Customer Success Manager at ForwardKeys.

## The result

### Easy-to-access real-time data to facilitate performance monitoring

*"As CEO of Tourism Corporation Bonaire, I am often confronted with questions such as, 'How's the season picking up?', 'How are we ranked vs other competitors?', or 'What's our air service capacity like for the summer?'. I can now confidently showcase our direction and performance based on real-time data that is monitored and shared via ForwardKeys,"* says Miles Mercera.

The tools supplied by ForwardKeys are straightforward to work with, while the ForwardKeys Customer Success team and analysts are available around the clock for any technical support or questions.

*"I am looking forward to our continued long-term collaboration with ForwardKeys, accomplishing the results yet to be achieved as there are more great things in the pipeline,"* Mercera concludes.



**Destination  
Gateway**

# Strategic and tactical decision making made easy for destinations

Destination Gateway is ForwardKeys' latest innovation. Built specifically for DMOs and tourist boards, this powerful yet intuitive solution provides destination clients with travel data at each step of the consumer journey in near-real time.

**Destination Gateway comprises:**



### Performance

Understand the performance of your destination regarding specific travel audiences – including historical trends, current patterns and outlook.



### Recovery

Chart the recovery of inbound travel by monitoring the evolution of ticket sales as compared to pre-Covid statistics.



### Connectivity

Power up your decision-making and negotiations with airlines by studying air capacity and supply to your destination, with a new load factors feature displaying the proportion of seats taken up on individual routes to a destination.



### Marketing

Understand your source markets' travel behaviour and profiles to optimally prepare your marketing plans and campaigns. Focus your analysis on your key markets or your key events.

**FORWARDKEYS'  
DATA SOLUTION  
FOR DMOS**



**LEARN MORE**

**CHTA members special offer**  
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on the annual subscription for Destination Gateway

# How to create an effective revenue management strategy

## The background

### The Westin's core tasks

The Westin Denarau Island Resort & Spa has many important tasks, including hotel revenue management, which involves selling the right rooms for the right price at the right time – using data analytics to predict optimal sales.

## The problem

### Keeping up with the fast-moving tourism market

The tourism market shifts incredibly fast, and each year brings new tourists from different countries to a destination. Since Westin only had access to historical data and could not view traveller movements from a broader perspective, it was unable to predict its future target audiences and when they would book.

This hurt the accuracy of room rates, which, in turn, negatively affected revenue. It also meant that the marketing budget was used suboptimally, and misspent on marketing in the wrong places, at the wrong time and to the wrong audiences.

## The solution

### How ForwardKeys helped

The Westin sought external data that could help them to solve these issues – and its search led it to ForwardKeys.

Our collaboration began with a correlation analysis in which we assessed whether our data correlated with that of the Westin. The study revealed a near-perfect correlation, meaning that our data could be used to forecast arrivals from Westin's source markets.

ForwardKeys offered two reports to address Westin's issues.

First was the Destination Report, which showed evolving market conditions like the nationality and profile of travellers to Fiji, and at which airport they were arriving.

The second report anticipated future air traffic flows from a specific source market to the destination. ForwardKeys was able to forecast nine months ahead using a complex algorithm that considers current bookings, historical bookings, route seasonality and events such as local public holidays.

## The result

### A successful revenue management strategy

Since collaborating with ForwardKeys, Westin has been able to outperform its competition thanks to the data and reports it receives regularly, which provide it with accurate and reliable insights on arriving travellers.

Equipped with this information, the hotel is well prepared to serve the needs of its audiences while improving its marketing strategy and hotel revenue management processes.



***ForwardKeys has been able to provide me with air travel insights that are the freshest and most detailed I have seen in my years of working in the hospitality industry. I now know when my key performing source markets are booking for future travel and can plan campaigns around them even before they book accommodation.***



**Joe Ellingham**, Director of Revenue Management  
The Westin Denarau Island Resort & Spa

**WESTIN**<sup>®</sup>  
HOTELS & RESORTS



# Why ForwardKeys?

## Our Data features

- ▶ The most comprehensive database of flight tickets in the world, which cover 60% of the market and included bookings made via travel agencies and those booked directly with the airlines.
- ▶ We have built an unmatched model to estimate the total number of travellers globally with speed (no need to wait for months, rather a week), detail and segmentation. Unlike others who only provide monthly numbers, our data can be used to take strategic decisions, quickly.
- ▶ The most comprehensive database of flight searches globally.
- ▶ Data on all global flights scheduled
- ▶ A wide range of data solutions to cater to industry needs, team expertise and budgets.

## Extensive Expertise

**Business Expertise** - Our ability to understand and anticipate the questions of our clients, the personal touch. It's not data we simply receive and resell as robots already do that.

**Industry Expertise** - We have acquired unrivalled expertise in building the right Data Smarts to help destinations understand and take advantage of tourism dynamics as they take place.

**In-house Data Scientists** - Ability to dynamically fuse various heterogeneous data points and apply predictive science and more!

## A trusted Industry reference

After 13 years of helping clients understand and predict air traveller trends, **ForwardKeys is recognized as the reference for monitoring, analysing, and predicting travellers and visitor flows around the world.** Our current destination portfolio is 120 clients (national, regional and city level) and growing.

ForwardKeys is a strong and recognizable brand in the market with firm alliances with recognised institutions such as CHTA, UNWTO, WTTC and PATA as well as news outlets such as the New York Times, BBC, Bloomberg and Financial Times.

## Data quality

Accuracy is one of ForwardKeys major priorities. We process thousands of tickets booked daily and we implement both automated quality assurance checks, as well as manual ones.

- ▶ Data granularity
- ▶ Data Freshness
- ▶ Data Integrity/Data Accuracy

# Data appendix

## Overseas arrivals in Caribbean and other regional destinations; vs 2019 levels

TOP DESTINATIONS	Q1 2023	Q2 Forward bookings
Antigua and Barbuda	2%	-13%
Aruba	1%	8%
Bahamas	-5%	3%
Barbados	-6%	-16%
Belize	3%	7%
Bermuda*	-28%	-18%
Bonaire, Saint Eustatius, Saba*	31%	-6%
Cancun (Mexico)*	13%	1%
Cayman Islands	-25%	-21%
Cuba	-52%	-58%
Curaçao	6%	13%
Dominican Republic	4%	3%
Grenada*	11%	27%
Guadeloupe	18%	7%
Guyana*	62%	45%
Jamaica	3%	11%
Martinique	11%	9%
Puerto Rico	3%	13%
Saint Kitts and Nevis*	-24%	-15%
Saint Lucia	-3%	1%
Sint Maarten	13%	0%
Trinidad and Tobago	-17%	6%
Turks and Caicos Islands	12%	20%
US Virgin Islands	17%	21%

<span style="color: #008080;">■</span>	The Caribbean
<span style="color: #FF8C00;">■</span>	Other regional destinations

Destinations with share in arrivals >0.5%

\*Q1 results as of 12 April

Q2 forward booking results are updated as of 12th April

Source: ForwardKeys Air Tickets Data





Know who's travelling  
**where and when**

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# PREDICTING TRAVELLERS' IMPACT

Contact us at  
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Check out the latest analysis at  
[www.forwardkeys.com](http://www.forwardkeys.com)

