

FORWARDKEYS'
DESTINATION INSIGHTS

Caribbean Travel Trends 2024

May 2024



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

CARIBBEAN TRAVEL TRENDS 2024



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION

The data included in this document is accurate according to ForwardKeys' market research database as of April 2024.

© ForwardKeys, 2024. All Rights Reserved.

Foreword

Now the global tourism industry has emerged from the shadow of the COVID-19 pandemic, the Caribbean finds itself in a strong position, having achieved exceptional growth in recent years. However, the region faces increased competition as destinations worldwide reopen and travellers have more choice than ever before.

In this complex travel environment, data-driven insights are critical for Caribbean destinations to make effective decisions. Harnessing ForwardKeys' travel intelligence and insights allows CHTA and its members to identify key opportunities and challenges based on accurate forward-looking data.

As the Caribbean seeks to build on its success in the global tourism recovery, a data-based approach to destination promotion and management will be foundational for a sustainable, resilient and profitable future for the region's tourism sector.



Olivier Ponti
Director - Intelligence & Marketing
ForwardKeys



Nicola Madden-Greig
OD, President
The Caribbean Hotel & Tourism Association



As we navigate the post-pandemic tourism landscape, our region faces both immense opportunities and challenges. Traveler behavior is evolving, new markets are emerging, and the competitive environment is more dynamic than ever before.

To succeed in this new world, Caribbean hospitality and tourism businesses must harness data and technology to understand and anticipate the needs of the modern-day traveler. Working in partnership with travel intelligence leaders such as ForwardKeys equips our industry with the insights required to identify and target high-potential customer segments, optimize marketing strategies, and drive sustainable tourism growth.

I am confident that Caribbean tourism will continue to thrive in the years ahead, driven by the creativity and entrepreneurial spirit of CHTA members throughout the region. Sharing knowledge and insights through this report is an important step in ensuring that we remain at the forefront of the global tourism recovery and continue to compete and excel in the global tourism landscape.



About this report

Methodology

Data used in this report

The insights in this report were compiled from **ForwardKeys Actual Air Tickets**, the most comprehensive source of tickets booked globally. All tickets issued until 19 April 2024 have been used in the analyses of travel trends during the first half of 2024 benchmarked against 2023 and 2019. The results refer to international tourist arrivals, defined as travellers staying at least one night in the destination as part of a return trip.

Information on air connectivity is compiled from **ForwardKeys Seat Capacity**, which includes information on scheduled direct commercial flights and their seat capacity, with schedules as of 22 April 2024.

Perimeter and definitions

The geographic distribution of countries and continents is as defined by the UNWTO, unless specified otherwise. Caribbean destinations included in this report include: Anguilla, Antigua and

Barbuda, Aruba, Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cancun, Cayman Islands, Cuba, Curaçao, Dominica, Dominican Republic, Grenada, Guadeloupe, Guyana, Haiti, Jamaica, Martinique, Puerto Rico, Saint Barthelemy, Saint Kitts and Nevis, Saint Lucia, Sint Maarten, Saint Martin, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Is., US Virgin Islands. "European markets" refers to EU27 countries and the United Kingdom.

Family-sized groups: 3-5 travellers within the same itinerary.

Business Travel: Itineraries characterized by specific factors including the distribution channel used (corporate travel portals), the length of the trip, the nature of the stay (such as overnight, extended, or day trip), and the haul length.

Premium Class Travel: Those passengers travelling in First and Business class cabins.

H1 2024: "First Half of 2024" (Jan-Jun)



About ForwardKeys

ForwardKeys is a travel intelligence specialist – founded on the simple idea that businesses dependent on international travel, such as DMOs and tourism organisations can make better strategic decisions if they know who is travelling where, when, and for how long.

The ForwardKeys data ecosystem provides exclusive insights into air travel through a variety of data partners and industry entities covering direct airline tickets and travel agency bookings, flight searches, seat capacity, events, air traffic statistics and more.

The data is processed and enriched using a combination of expert review and manipulation, algorithmic processing and AI tools to produce discrete data products which offer unparalleled insight into the profile, behaviour and impact of past, present and future travellers.

Yet it is not only ForwardKeys clients that benefit from this level of insight, as several of the company's top minds frequently share their expertise with global audiences at industry events. As guest travel and tourism speakers describe how data is transforming the market and advise industry players on extracting the most value from this data.

GET IN TOUCH TO LEARN
MORE ABOUT OUR
CONSULTING SERVICES

[CONTACT US](#)



Table of contents

Travel trends	6
Caribbean tourism remains robust, but growth slows	7
Mid-tier destinations gain ground on strategic segments	9
Intra-Caribbean connectivity opens the door for multi-destination trips	11
Opportunities and risks	13
Increased North American connectivity reflects growing demand	14
European travellers look elsewhere, but high-value travel grows	16
Latin American travel continues to grow, exceeds 2019 levels	16
Caribbean carnivals drive tourism growth from key visitor segments	17
Data-driven crisis management: Navigating challenges and building resilience in Caribbean tourism	18
Caribbean success stories	19
How Jamaica has remained resilient through global disruptions	20
Sculpting a more sustainable tourism model for Grenada	22
Empowering small businesses in Puerto Rico to capture visitor share	24
Partnerships propelling success: US Virgin Islands' triumph in tourism marketing	26
Data appendix	29

Travel trends



Caribbean tourism remains robust, but growth slows

International arrivals to the Caribbean show a +10% year-on-year increase for the first half of 2024 – and overall growth of +13% compared to 2019, highlighting how the COVID-19 period propelled destinations in the region to a competitive position. With tickets for international arrivals globally remaining at 16% below pre-pandemic levels, the Caribbean remains a strong performer.

However, the year-on-year growth, while positive, represents a more modest increase compared to the rest of the Americas which exhibits +15% growth over the same period. It is therefore crucial for forward-looking Caribbean destinations to develop strategies to remain relevant in an increasingly competitive travel environment. The key question is how well regional destinations will be able to consolidate and build on their recent success as other international markets such as Asia complete their recoveries and compete for market share.

Several top-tier Caribbean destinations – those representing a market share of 5% or larger – are leading the way. Puerto Rico tops this ranking, with overseas arrivals showing +18% year-on-year growth in the first half of 2024, driven primarily by arrivals from the United States. U.S. markets showing strong growth include Atlanta (+54%), Houston (+23%) and Fort Lauderdale (+20%).

Significant growth is also in evidence for the Dominican Republic (+12%), boosted by increased connectivity from key origin cities such as Orlando. Elsewhere, Cancun in the Mexican Caribbean (+7%), the Bahamas (+6%) and Jamaica (+2%) show more moderate growth.

The key question is how well regional destinations will be able to consolidate and build on their recent success as other international markets such as Asia complete their recoveries and compete for market share

Overseas tourist arrivals by destination in H1 2024

Top-tier destinations	Var vs 2023
Puerto Rico	+18%
Dominican Republic	+12%
Cancun (Mexico)	+7%
Bahamas	+6%
Jamaica	+2%

*Considering destinations that represent more than 5% share

Mid-tier destinations	Var vs 2023
Belize	+30%
Curaçao	+24%
Aruba	+20%
Sint Marteen	+19%
Grenada	+19%
US Virgin Islands	+18%
Turks and Caicos Is.	+16%
Barbados	+14%
Cayman Islands	+11%
Saint Lucia	+11%
Guyana	+11%
Antigua and Barbuda	+9%
Trinidad and Tobago	+7%
Cuba	+4%
Martinique	+4%
Bermuda	=0%
Guadeloupe	-1%

*Considering destinations that represent between 0.5% and 5% share

Mid-tier Caribbean destinations – those with a market share between 0.5% and 5% – also show impressive growth in the first half of 2024. Belize leads this ranking with international arrivals up +30% year-on-year. This is again driven by the U.S. market, in this case primarily due to bookings from New York, which are +91% higher than 2023 following the launch of new direct flights in December.

Overall, the top-performing secondary destinations are expected to achieve double-digit year-on-year growth, with only Bermuda and Guadeloupe seeing arrivals in line with or behind 2023 levels.

International arrivals to...	H1 2024	
	Var vs 2023	Var vs 2019
Caribbean	+10%	+13%
Rest of Americas	+15%	-11%
Global	+19%	-16%



Mid-tier destinations gain ground on strategic segments

As Caribbean destinations seek to consolidate their post-pandemic tourism growth, a pragmatic long-term approach is needed – not just seeking to increase overall visitor numbers, but strategically targeting key market segments.

Detailed analysis of travel intelligence data allows destinations to identify and focus on those segments which drive high-value, sustainable travel, from family groups to business travel, to high-spend visitors.

Uncovering the segments which have driven growth in arrivals to Caribbean destinations in 2024 offers valuable lessons for the whole region on how to build a tourism model which delivers long-term benefits to local communities and the environment, as well as to the traveller.

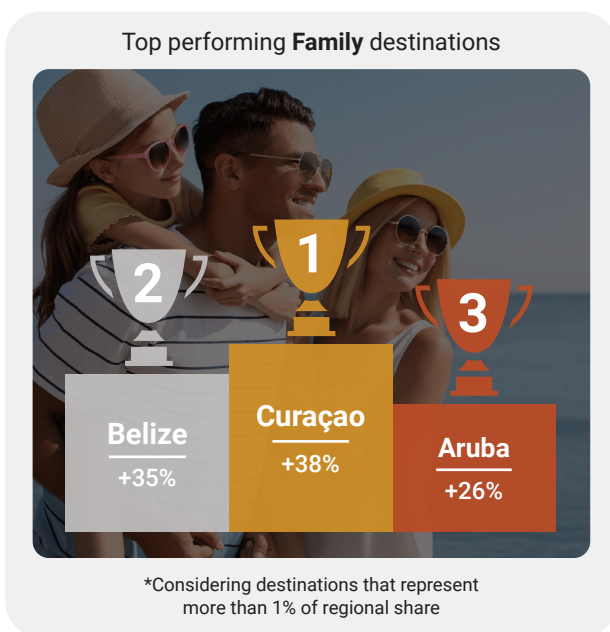


Family travel on the rise to both top-tier and mid-size destinations

Arrivals of family-sized groups (3-5 passengers) to Caribbean destinations show an increase of +13% year-on-year in the first half of 2024. This matches similar growth in solo travellers, and exceeds that of couples, highlighting the importance of the family segment to tourism strategy in the region.

Curaçao leads as the top-performing destination for family travel, with arrivals up +38%, driven by strong demand from South American markets such as Colombia (+97%), Ecuador (+76%), Peru (+75%) and Brazil (+71%). Belize (+35%), Aruba (+26%) and Sint Maarten (+23%) also see impressive increases.

This underlines the importance of timely access to accurate air travel data for Caribbean destinations looking to focus on this lucrative market segment and target their marketing and promotional efforts at a country or regional level.



Top performing **Business** destinations



*Considering destinations that represent more than 2% of regional share

Business travel lags behind leisure, but some destinations thrive



The Caribbean’s post-pandemic travel recovery is being driven by leisure visitors, with arrivals up by +11% year-on-year in the first half of 2024. In contrast, business travel is showing just 3% growth over the same period, highlighting the slower recovery of this segment as virtual meetings remain prevalent post-pandemic.

However, there is encouraging growth at a destination level, with Dominican Republic, the U.S. Virgin Islands and the Cayman Islands all showing substantial increases in overseas business travel arrivals.

For other Caribbean destinations, understanding evolving business travel patterns and re-building MICE infrastructure will be crucial for attracting this high-yield market segment in 2024 and beyond.



Premium class travel shows significant growth over standard class

Whilst overseas air passenger arrivals to the Caribbean show growth of 9% year-on-year in the first half of 2024, bookings in high-end cabins (First and Business Class) are substantially outperforming the market average, with growth of 39% compared to the same period in 2023.

This demonstrates the enduring strength of luxury travel to the region as high-yield travellers continue to seek out exclusive Caribbean experiences, with Turks and Caicos, the Cayman Islands and the US Virgin Islands showing the highest growth – and collectively accounting for almost 10% of all premium class arrivals.

These insights highlight a valuable opportunity for Caribbean destinations to target luxury travellers in 2024 through the development of personalised, premium travel products and focused marketing campaigns in high-value source markets.

Top performing premium class destinations



*Considering destinations that represent more than 2% of regional share



Intra-Caribbean connectivity opens the door for multi-destination trips

Analysis of detailed air capacity data reveals that connectivity to the Caribbean is showing impressive growth, increasing +13% overall in the first half of 2024 compared to the previous year. Canada is contributing significantly to this success – with an increase in seat capacity of +17% making it the largest origin market currently performing above the global average. Meanwhile the largest origin market overall, the US, tracks global average growth at 13%.

However, Intra-Caribbean connectivity expanded by 20% year-on-year. This is a key enabler of multi-destination trips within the region, with notable increases from Cancun (+78%), Barbados (+56%) and the U.S. Virgin Islands (+50%).

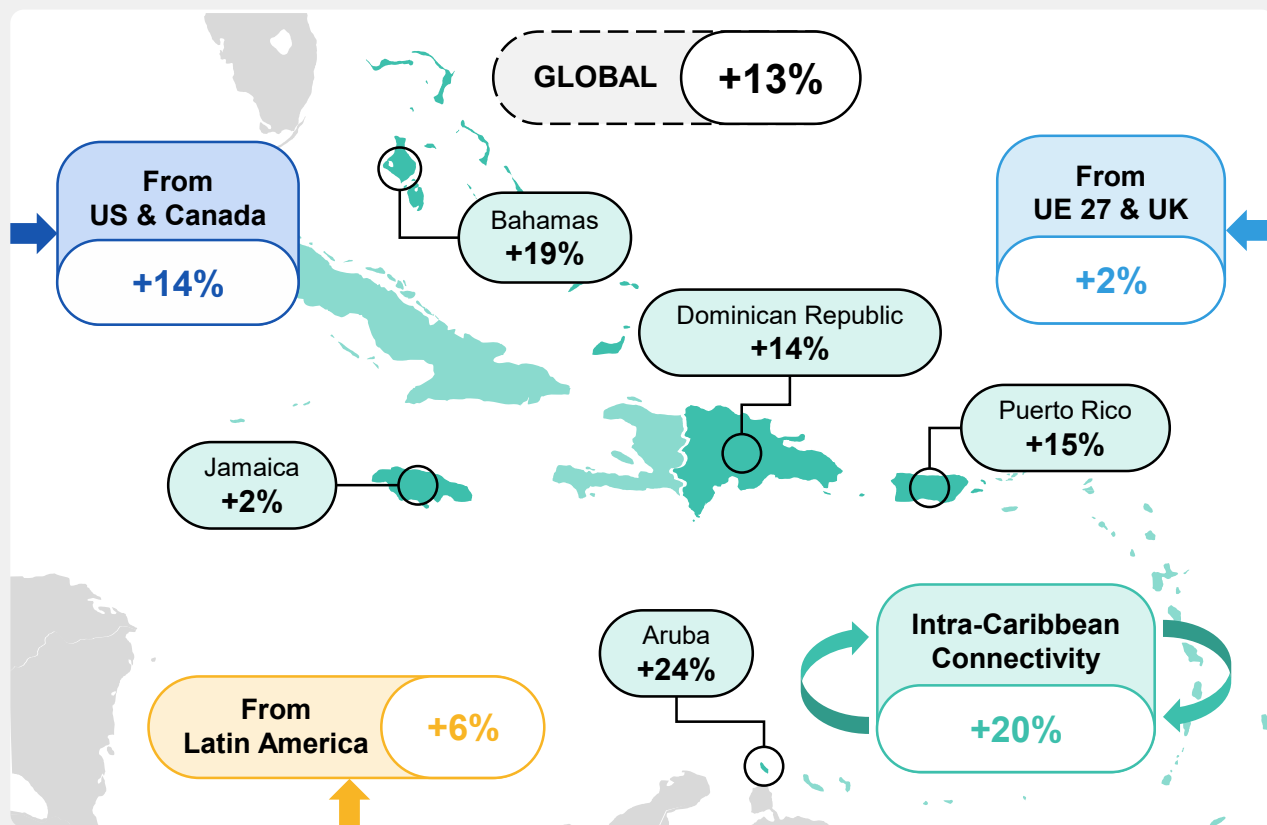
Connectivity from Latin America shows a more moderate increase, with 6% growth in capacity over the same period. Nevertheless, at the country level there is significant growth in key markets. Brazil is the standout origin market with seats to the Caribbean up an impressive +112%, followed by Argentina at +83%.

Growth in connectivity from Europe is slower at +2%, but a number of origin markets are performing above average, especially Germany (+11%), the UK (+6%) and the Netherlands (+5%) – a promising sign for Caribbean destinations as these markets are traditionally associated with higher than average spend.

Intra-Caribbean connectivity expanded by 20% year-on-year. This is a key enabler of multi-destination trips within the region

The strong growth exhibited in the first half of 2024 – particularly in intra-regional connectivity – is crucial as the Caribbean seeks to attract more multi-destination travellers motivated to explore the diversity of the region’s tourism offer. It also enables regional destinations to target growth in high-value segments such as luxury travellers and family groups, who are more likely to travel to the Caribbean when increased international air capacity offers more flexibility in carrier choice and scheduling.

Seat Capacity in overseas flights to the Caribbean region by destination, H1 2024 vs 2023





Know exactly who's visiting, when and for how long

DMOs have evolved – and destination marketing is now only a part of the equation. Balancing the needs of tourists versus locals requires a detailed understanding of the economic, social and environmental impact of inbound travel.

With ForwardKeys you'll gain access to the comprehensive data you need to understand traveller behaviour at a granular level – past, present and future.

[LEARN MORE](#)

ForwardKeys solutions for DMOs



Destination Gateway

A revolutionary app for DMOs!

Rapid, actionable insights via advanced analytics dashboards. Comprehensive data visualization for everyone in your organization.



ForwardKeys Connect

Our data – your way!

Stay ahead of industry trends and boost ROI – with no-code access to the most comprehensive, granular and up-to-date global travel data in the industry.



ForwardKeys Nexus

Our most advanced BI solution

A fully-featured real-time BI application with a focus on datasets –allowing you to navigate our data and extract any piece of information contained within.



ForwardKeys Smarts

Transform the way you work with data

Data Smarts are curated and processed datasets, enriched with advanced data science – allowing you to answer key business questions across a range of use cases. Get direct access to our library via our Connect DaaS platform and other delivery methods.

Opportunities and risks



Increased North American connectivity reflects growing demand

Toronto emerges as the top-performing North American origin city for travel to the Caribbean in the first half of 2024, with arrivals up 23% year-on-year. This growth is supported by a 15% increase in seat capacity between Toronto and the Caribbean, with various airlines increasing the number of available flights.

In the United States, New York (+13%) also shows sustained growth, as well as key origin markets Dallas (+21%), Orlando (+18%), Charlotte (+18%) and Washington D.C. (+18%), demonstrating the ongoing strength of U.S. demand for Caribbean destinations.

Connectivity enhancements improve access for North American markets

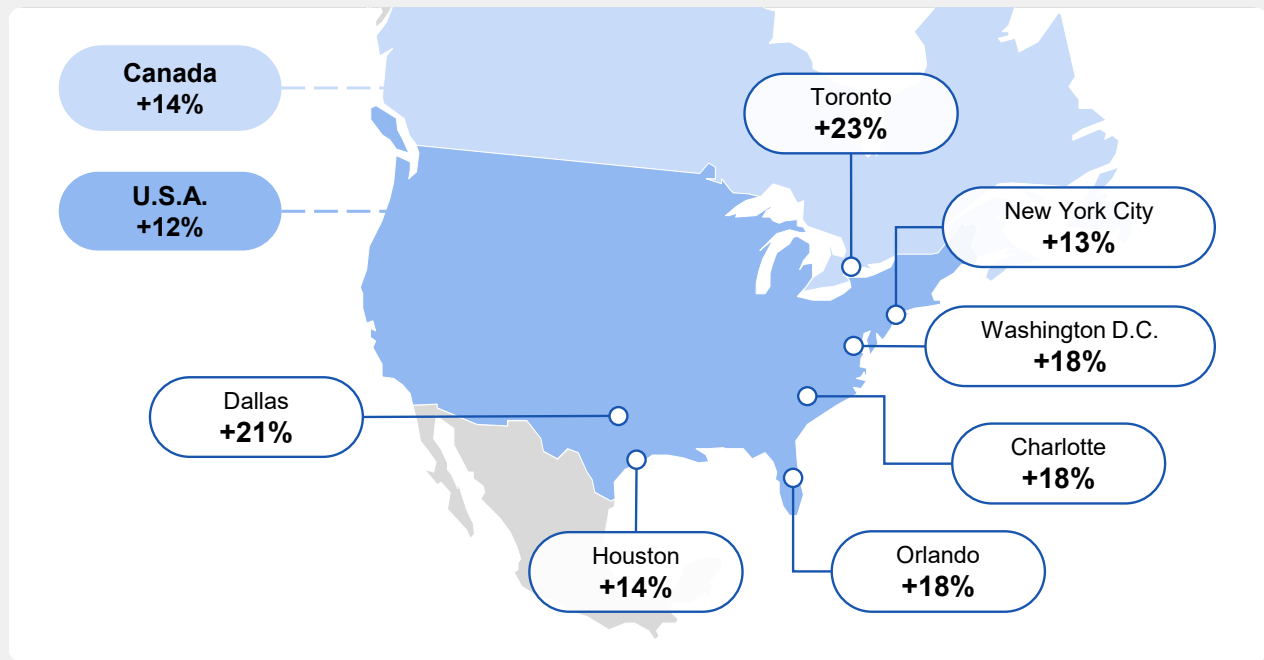
Direct connectivity between North America and the Caribbean has improved significantly since 2019. In the first six months of 2024, 68% of all arrivals from the U.S. and Canada are flying directly to their Caribbean destination, an increase of 5 percentage points compared to pre-pandemic levels.

However, despite this growth in direct service, a substantial 32% of arrivals will still connect via at least one hub, highlighting the continued importance of transfer traffic for the region, particularly for accessing secondary destinations and smaller islands with more limited international flight options.

Major hubs such as Dallas, Miami and Atlanta are also becoming increasingly important for connecting the Caribbean to U.S. markets, driven by expanded direct capacity to the region.

Charlotte Douglas International Airport is the top performing North American hub for Caribbean connectivity, with passenger numbers increasing 23% year-on-year in the first half of 2024. Other major hubs such as Dallas, Miami and Atlanta are also becoming increasingly important for connecting the Caribbean to U.S. markets, driven by expanded direct capacity to the region.

Overseas arrivals in the Caribbean by origin city in H1 2024 vs 2023



From Charlotte specifically, airlines have added 30% more seats to Caribbean destinations in the first six months of 2024 compared to the equivalent period in 2023. Domestic U.S. connections to Charlotte from cities not served by direct Caribbean flights have also grown 15% year-on-year, with above-average growth from Louisville, Knoxville, Sarasota, and Greenville among others.

Increased connectivity from North American hubs expands the Caribbean's reach into secondary U.S. and Canadian markets, attracting new travellers who can now reach the region's destinations with just one stop. This presents opportunities for tourism stakeholders to develop partnerships with airlines and airports and promote multi-destination itineraries.

Transfers of US & Canadian travellers visiting the Caribbean in H1 2024

Top Performing Hubs*	Var vs 2023
Charlotte, NC (CLT)	+23%
Dallas, TX (DFW)	+19%
Miami, FL (MIA)	+18%
Atlanta, GA (ATL)	+12%

*Considering airports that represent 2% share of all transferring US and Canadian travellers

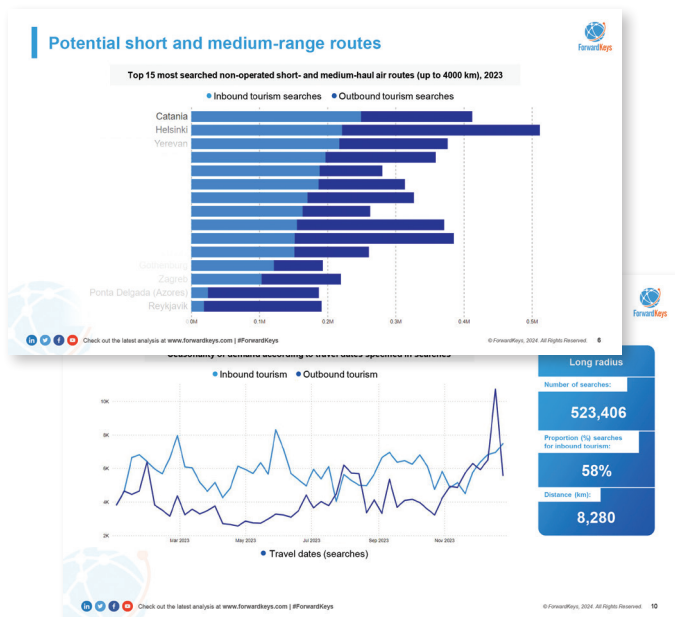
Intelligence consulting report - Unserved Routes

A **Consulting Report** designed specifically for individual Destination Management Organizations (DMOs) and tourism boards can offer a range of bespoke benefits that resonate with their particular requirements.

This report identifies potential, unserved or underserved flight paths through analysis of various data sources, evaluating their sustainability, seasonality, and inbound/outbound potential to ensure they meet market demand and supporting strategic destination expansion.

Unserved Routes report

- Allows DMOs to identify or contrast **connectivity development opportunities** based on travel intent.
- Backed by the **most comprehensive flight search dataset** available in the market.
- **Knowledge and data transfer** to equip client's research team with the know-how and tools to expand the analysis.
- **Unrestricted access to demand information** at route level information of operated and unserved routes, including insights like demand seasonality.
- Available in **Spanish and English**.



European travellers look elsewhere, but high-value travel grows

Overall European arrivals to the Caribbean are 5% lower in the first half of 2024 compared to the previous year. However, European travel to other long-haul destinations is showing strong growth. Asia Pacific is the highest performer year-on-year, with arrivals up 37%, driven by the reopening of major destinations such as China (+182%), Vietnam (+50%), Japan (+48%) and Thailand (+47%).

Travel to the Americas (excluding the Caribbean) is also 9% ahead of last year, fuelled by above-average growth to Peru (+44%), Chile (+14%), Colombia (+13%), and Brazil (+10%) – suggesting that European travellers who took advantage of less restricted travel to the Caribbean in recent years are turning their attention elsewhere as new opportunities open up.

However, despite the weaker overall European performance, high-yield travellers from Europe to the Caribbean show an increase (+5%), particularly from the UK (+19%), indicating that the region remains an attractive option for the luxury market.

Overseas arrivals in the Caribbean by origin in H1 2024

Top Performing European Markets*	Var vs 2023
Italy	+7%
Austria	+5%
United Kingdom	-1%
Spain	-5%
France	-6%
Netherlands	-7%
Germany	-9%
TOTAL EUROPE	-5%

*Considering markets that represent more than 1.5% share

Latin American travel continues to grow, exceeds 2019 levels

Overseas arrivals in the Caribbean by origin in H1 2024

Top Performing Latin American Markets*	Var vs 2023
Colombia	+20%
Brazil	+12%
Argentina	+9%
Chile	+7%
Uruguay	+3%
Peru	-13%
TOTAL LATIN AMERICA	+10%

*Considering markets that represent more than 4% share

Latin America is a key emerging source market for the Caribbean, with arrivals in the first half of 2024 showing growth of 17% above 2019 levels and 10% above 2023, confirming the region’s strong growth trajectory. High-yield travellers (+13%) are showing better growth than economy class travellers (+10%), which offers a positive outlook for in-destination spending.

At the country level, Ecuador and Colombia are the top performing origin markets, each showing an increase in arrivals of 20% year-on-year. Ecuadorian travellers are driving growth to destinations such as Aruba (+136%) and Curaçao (+70%), whilst Colombian visitors are a main factor in Cuba’s recovery, with arrivals soaring by +221% compared to the same period in 2023.

Business travel from Latin America to the Caribbean is also recovering strongly, albeit at a slower pace than leisure travel. Key growth markets for international business travel include Colombia (+46%), Uruguay (+35%) and Mexico (+20%, excluding Cancun), with Curaçao (+26%) the most popular destinations for Latin American corporate travellers overall.

Caribbean carnivals drive tourism growth from key visitor segments

Festivals and events are increasingly important for Caribbean destinations to boost demand, diversify their visitor base, and build global brand awareness — attracting visitors from key source markets both in the Caribbean and North America.

Carnivals are a prime example of successful events in the Caribbean. During Trinidad and Tobago’s carnival season in February, group travel surged (+52% year-on-year), and high-yield arrivals grew substantially (+31%), underlining the event’s appeal for these valuable and lucrative visitor segments.

For Caribbean destinations, travel intelligence provides a competitive edge, allowing them to monitor the success of event strategies at competing destinations.

For instance, significant interest in South American carnivals, such as Rio Carnival, was observed from both North American and European markets. These represent potential audiences that Caribbean destinations can attract for their own carnival events through carefully targeted marketing campaigns.



Events module

DISCOVER HOW EVENTS IMPACT YOUR DESTINATION

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.

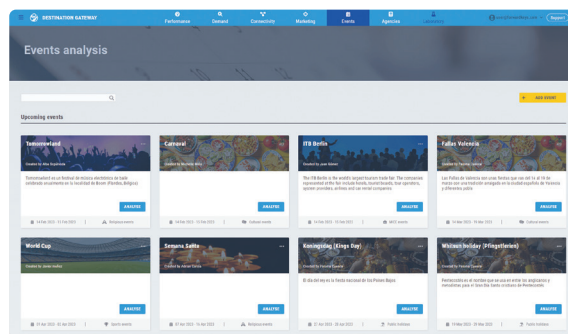
NEW EVENTS MODULE

- **Event performance tracking**
Monitor the success of your MICE, entertainment or sports events.
- **Anticipate the demand**
Find markets with intention to travel and track the booking pace for future events.
- **Define competitive advantage**
Capture your market share driven by holiday periods in your key source markets.



Destination Gateway

FORWARDKEYS’ DATA SOLUTION FOR DMOs



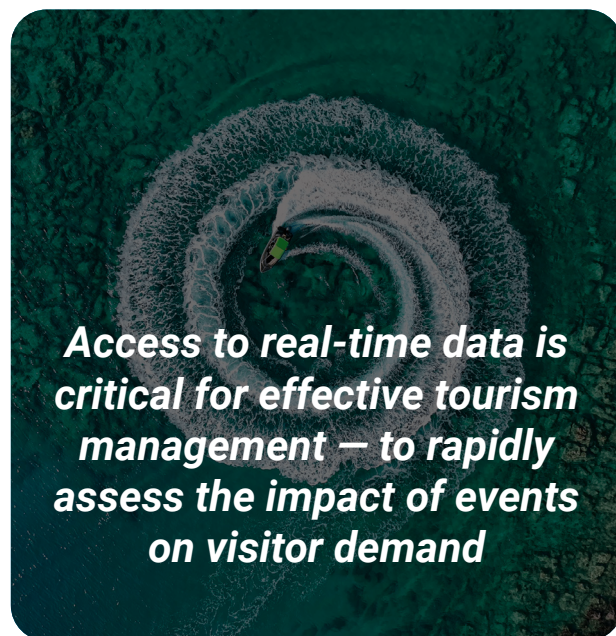
KNOW MORE

Data-driven crisis management: Navigating challenges and building resilience in Caribbean tourism

Caribbean destinations face an array of potential crises – from environmental disasters to security and safety concerns. Access to real-time data is becoming increasingly critical for effective tourism management – to rapidly assess the impact of these events on visitor demand and adapt their strategies accordingly.

When travel warnings were issued for the Bahamas and Jamaica in early 2024 due to crime and safety concerns, both markets saw a short-term dip in U.S. visitor arrivals (-24% and -20% respectively). However, booking volumes recovered to pre-crisis levels within 2 weeks in the Bahamas and 4-6 weeks in Jamaica highlighting the resilience of traveller sentiment and giving destinations the confidence to continue resourcing their marketing efforts.

Similarly, real-time intelligence demonstrated the minimal impact of the February 2024 oil spill on travel to affected Caribbean destinations such as Tobago, Bonaire, Curaçao and Aruba. The data showed no significant drop-off in demand, enabling destinations to optimise their messaging and avoid an unnecessary blow to traveller confidence.



Data Smarts for DMOs



ForwardKeys
Smarts

[LEARN MORE](#)

Data Smarts for DMOs

Data Smarts are curated and processed datasets, enriched with advanced data science and ready for you to use to answer key business questions across a range of use cases.

Get direct access to our data lake via our Connect platform and other cloud systems – facilitating data sharing from complete datasets to exclusive Data Smarts.

➤ Air travellers

Insight into consolidated global air travel flows by airport, with real tickets issued and comprehensive passenger segmentations.

➤ Air Supply

Information on current and scheduled flight and seat capacity, to understand total seats offer on the market.

➤ Travel Intent

Insight into travel intent based on the destinations would-be travellers are searching for, tickets issued for travelling in future dates with comprehensive passenger segmentations, as well as details on unserved routes as reflected by popular searches.

➤ Sustainable travel

Insight into the sustainability of air corridors as reflected by their total carbon footprint impacting the destination.

Caribbean success stories



How Jamaica has remained resilient through global disruptions



JAMAICA

By **Donovan White**
Director of Tourism - Jamaica Tourist Board

The Background

Jamaica is the third largest island in the Caribbean situated south of Cuba and west of Haiti in the West Indies. It has long been a popular tourist destination, particularly from the U.S. market which represents about 70% of visitor arrivals annually, with the travel and tourism sector accounting for approximately 30% of the nation's overall GDP.

Considered by many to be the cultural capital of the Caribbean, it is the birthplace of reggae, and known for its natural beauty and distinctive visitor areas including Montego Bay, Ocho Rios and Negril, among others.

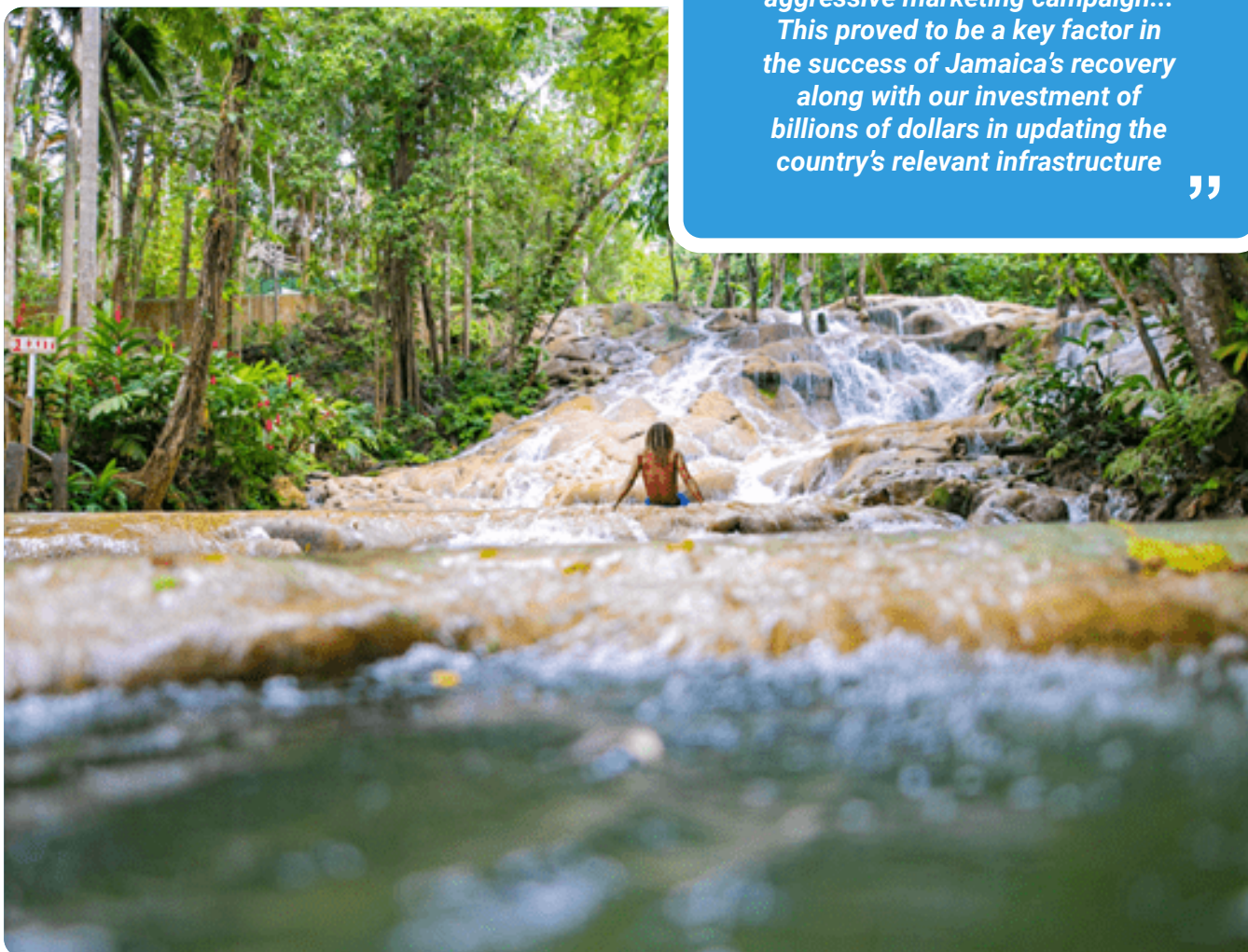
The Problem

Like many countries, Jamaica was faced with multiple disruptions in recent years, from the COVID pandemic to international travel advisories. With the onset of the COVID-19 pandemic that brought border closures, cancelled flights and the cessation of cruise ship calls to countries across the globe, as well as misinformation in the form of travel advisories, the island needed to be resilient for rapid recovery.

“

We embarked upon a very aggressive marketing campaign... This proved to be a key factor in the success of Jamaica's recovery along with our investment of billions of dollars in updating the country's relevant infrastructure

”





The Solution

In the case of COVID, Jamaica quickly implemented what would become an award-winning program, its Jamaica CARES program, including the establishment of its innovative Resilient Corridors and robust health and safety protocols. These protocols were among the first to receive the World Travel & Tourism Council's 'Safe Travels' recognition that allowed Jamaica to safely reopen in June of 2020. Visitors to the island were required to remain within the Resilient Corridors, which covered more than 85 percent of the island's tourism product and included less than one percent of the population and which recorded a COVID-19 infection rate under one percent. Further, Jamaica established a Tourism Vaccination Task Force that aimed to facilitate the administration of COVID-19 vaccinations to all tourism workers island-wide. In addition, an aggressive public relations campaign focusing foremost on the U.S. market ensured the Jamaica CARES messaging was communicated to consumer and trade outlets and the island began hosting media and influencers who helped share and demonstrate the news that it was safe for travelers to visit Jamaica.

In the case of the U.S. State Department re-issuing a Level 3 Travel Advisory for crime and health care concerns in early 2024, Jamaica again worked closely with key partners, including travel advisors and hoteliers, to convey the message that the advisory level had not increased in several years and, in fact, crime was down significantly on island and crimes against visitors were at a small .01%. Jamaica also stressed its high repeat visitor rate of 42% to illustrate that consumers feel confident in traveling to the island safely and securely.

"In both the pandemic and travel advisory cases, we embarked upon a very aggressive marketing campaign, meeting with key tourism stakeholder partners including investors, cruise lines, airlines, tour operators and travel agents," said Donovan White, Director of Tourism, Jamaica Tourist Board. "This proved to be a key factor in the success of Jamaica's recovery along with our investment of billions of dollars in updating the country's relevant infrastructure, including improvements to the island's two major airports and the development of beach facilities, regeneration of heritage sites, building and upgrading of piers, and construction of a national highway network."

The Result

90 percent of tourism investments in the destination remained on track post-COVID and airline partners continue to add new routes to the island. Visitation to the island continues to grow and, in fact has exceeded pre-COVID with more than 4 million visitors in 2023 and earning US\$4.2 billion in gross foreign exchange, while trending positively for 2024.

"It was truly a testament to the strength and lasting appeal of Jamaica's tourism product to see our partners add service and visitors return in such solid numbers," continued Director White. "This firmly placed Jamaica among the leading destinations for tourism recovery from the pandemic, not only within the Caribbean but in the entire world."

Sculpting a more sustainable tourism model for Grenada



GTA | **GRENADA**
TOURISM AUTHORITY

By **Petra Roach**
CEO - Grenada Tourism Authority

The Background

The tri-island paradise of Grenada, Carriacou and Petite Martinique is nestled in the north-south arc of the Lesser Antilles. Known as “The Spice Isle”, the Caribbean country is located 100 miles north of Trinidad and is known for its unspoilt rainforests, award-winning azure-tinted beaches, rich heritage and culinary delights. With hikes, beachfronts, Spicemas and chocolate tours a-plenty, Grenada unlocks a true sense of adventure and curiosity in travellers and memory-makers.

“ Our team identified an opportunity to encourage more visitors to visit our breathtaking shores and learn more about our stunning marine spaces in a responsible, sustainable way. We needed to find a way to build a bridge between marine conservation and cultural preservation efforts ”

The Problem

By conducting extensive field tests and data-gathering by qualified industry specialists, the Grenada Tourism Authority recognised that there was environmental pressure on reefs in the locality over time. With climate challenges such as rising water temperatures, harsher weather conditions and other marine factors faced throughout the Caribbean, it became a priority to implement effective marine management and activate innovative ways to accelerate coral reef development, reproduction and recovery.

“Through strategic planning and stakeholder consultations, our team identified an opportunity to encourage more visitors to visit our breathtaking shores and learn more about our stunning marine spaces in a responsible, sustainable way. We needed to find a way to build a bridge between marine conservation and cultural preservation efforts,” says Petra Roach, CEO of the Grenada Tourism Authority.





The Solution

The historic Molinière Underwater Sculpture Park represents a new dimension of art and marine conservation to Grenada's pristine waters. Originally installed in 2006 under the artistic direction of sculptor Jason deCaires Taylor, several underwater sculptures - such as Vicissitudes, Nutmeg Princess, The Lost Correspondent and Coral Carnival - were submerged and installed in the thriving underwater oasis that has become a symbol of art, conservation and cultural pride in Grenada. The unveiling of 31 new sculptures in December 2023 brought a new dimension as on this occasion, the sculptures represented the ever popular characters of carnival celebration called Spicemas.

This new installation was as part of an ongoing rehabilitation and upgrade initiative for the world's first underwater sculpture park, which celebrates artistic expression and cultural richness by embracing the preservation of marine life.

"As the Dive Capital of the Caribbean, our local communities proudly work together to preserve this niche experience. Maintenance of the park is a shared responsibility in Grenada, and we have implemented a number of programs to promote sustainable tourism, as well as policies to support those conservation interests," CEO Roach explains, noting that the sculptures are only 5m (16ft) below the surface. "Protecting our marine and terrestrial ecosystems and promoting responsible travel practices would not be possible without active community involvement."

These captivating sculptures, inspired by traditional carnival and folklore characters, have been thoughtfully placed beneath the surface, creating an enchanting underwater gallery for visitors. As a fusion of art and environmental responsibility, the Coral Carnival is a testament to Grenada's continued commitment to preserving its oceans and coral reefs.

The Result

The installations at the world's first Underwater Park are the epitome of responsible tourism practices - predominantly made of simple substrates including concrete and rebar, which create an ideal substrate that is relatively fixed and permanent on which marine life may develop. Thoughtfully positioned to enhance the Grenadian reef, this magical marine attraction makes natural use of its varied topographical environment of craggy gullies and sun-dappled sandy patches that will naturally evolve over time.

"We have seen a growing number of solo adventurers, group travelers and eco-friendly option seekers in the last 2 years, and the Underwater Sculpture Park represents a blend of interests for our international visitors," Roach says. In attracting a stunning array of both marine life and human curiosity, it is safe to say that Grenada has taken the plunge by leading the charge and ushering in a new era of sustainable tourism for the Caribbean region.

Empowering small businesses in Puerto Rico to capture visitor share



DISCOVER
Puerto Rico

By **Brad Dean**
CEO - Discover Puerto Rico

The Background

In 2024, Puerto Rico is entering what could be its fourth record-breaking year in all major tourism industry economic metrics, as its lodging demand has grown in double digits since 2021.

Last year, lodging income surpassed pre-pandemic levels and doubled total 2019 revenue. According to the state economic development agency, that same comparison in the restaurant sector shows a 35% increase.

This growth is sparking investments that, in the short or midterm, could expand hotel room night capacity by 20%.

“All this growth came from the opportunities that appeared as governments prioritized economic development stimulus measures in their budgets to compensate for the economic shock of COVID-19 lockdowns. That economic development prioritization proved to work in Puerto Rico, enhancing tourism marketing capabilities, reaching a greater audience with improved effectiveness, and generating more interest in eager-to-travel crowds,” said Brad Dean, Discover Puerto Rico’s CEO.

The Problem

Even before lockdowns lifted, Discover Puerto Rico’s team recognized that the pandemic isolation had forever changed travel. Also, they knew that new digital platforms were reaching a far greater audience than before.

“For small businesses to capture their fair share of the visitor’s economy, many had to update their game and increase their visibility in the leading digital travel planning platforms and social media networks. If not, the recovery would’ve been defined by a few big winners and many small businesses not feeling the economic improvement at all,” explained Dean.

“Bigger companies usually have robust marketing and public relations budgets and staff focused only on attracting consumers. That’s not usually the case for small businesses, where owners, managers, and employees often multitask their way to success. This gap in capabilities between the bigger and smaller companies always exists. Still, it was widening rapidly as lockdowns and pandemic restrictions drove massive audiences to rely on online platforms and services,” he added.

“*For small businesses to capture their fair share of the visitor’s economy, many had to update their game and increase their visibility in the leading digital travel planning platforms and social media networks. If not, the recovery would’ve been defined by a few big winners and many small businesses not feeling the economic improvement at all*”





The Solution

As new technologies emerge, people spend more and more time in front of a screen. That process has been going on for decades but accelerated with the lockdowns, as people had to rely more on technology to communicate, buy groceries, and socialize. Most businesses adapted quickly but needed to learn about digital marketing, and neither knew nor valued the benefits and risks of how a company is portrayed online. However, that changed after consumers, including travelers, concentrated on those platforms.

That's why Discover Puerto Rico created the Island Digital Education Academy (La IDEA) program with pandemic recovery funds.

Discover Puerto Rico and its agency partners designed a curriculum that covered topics like digital marketing basics and business profile management in platforms like Google Business, Trip Advisor, Yelp!, and the leading social media networks.

"With the help of local universities, we extensively trained a group of students who became free-of-charge one-on-one consultants to the participating businesses. We automatically enrolled all businesses in our website listings and set out a series of events around the Island to enroll participants. All businesses received an audit of their digital footprint in leading traveler-used platforms, which helped them improve their online business profiles," said Dean.

The Result

Discover Puerto Rico's CEO explained they wanted to impact as many tourist-facing businesses as possible. The program started in January 2021. Two years later, they had over 5,700 participants with improved digital profiles on all major travel platforms, incorporated over 2,400 new businesses into DiscoverPuertoRico.com website listings, and around 800 participants completed all the training programs and received complementary services from a professional photographer who took marketing-oriented photos of their businesses.

When the program ended in December 2023, over 10,000 images of tourism-related businesses, attractions, and points of interest were created and uploaded online, showcasing the great tourism offerings of thousands of local businesses, and making them more appealing and authentic.

Partnerships propelling success: US Virgin Islands' triumph in tourism marketing



By **Joseph Boschulte**
Commissioner - U.S. Virgin Islands Department of Tourism

The Background

Nestled in the heart of the Caribbean Sea, the US Virgin Islands (USVI) comprises three main islands—St. Thomas, St. Croix, and St. John—each offering a unique blend of natural beauty and cultural heritage. St. Thomas, home to the vibrant capital of Charlotte Amalie, captivates visitors with its bustling harbor, historic sites such as Blackbeard's Castle, and stunning vistas. St. Croix, the largest of the islands, beckons with its lush rainforests, charming towns like Christiansted and Frederiksted, and iconic landmarks like the Cruzan Rum Distillery. Meanwhile, St. John, renowned for its pristine beaches and protected national parklands, invites travelers to explore its tranquil shores, hike scenic trails, and discover ancient petroglyphs. For U.S. citizens, there's the added convenience of no need for a passport to visit these tropical paradises, making the USVI an accessible and enticing destination.

The Problem

As the world reopened, the USVI faced new challenges. The resurgence of global airline travel and heightened competition within the Caribbean region demand a strategic recalibration of the territory's marketing efforts. Operational hurdles such as pilot shortages, escalating fuel costs, and aircraft availability pose additional obstacles, necessitating innovative solutions to sustain growth.

“

Our success lies in our ability to forge strategic partnerships and adapt to changing market dynamics. Through collaboration and innovation, we continue to position the US Virgin Islands as a premier destination for travelers

”





The Solution

In response to these challenges, the USVI Department of Tourism has prioritized strategic partnerships as a cornerstone of its marketing strategy. Leveraging data provided by ForwardKeys, the USVI crafted its marketing strategy in real-time, ensuring agility and relevance in a dynamic tourism landscape. Collaborations with industry leaders and innovative campaigns have enabled the territory to maintain its allure as a premier tourism destination. By forging alliances with key entities such as UberSoca Cruise and sports organizations, the USVI has unlocked new avenues for visitor engagement and brand exposure.

Simultaneously, efforts to attract airlines included direct negotiations, participation in industry events like Routes Americas, and collaboration with local authorities to streamline processes and enhance infrastructure. By fostering collaboration and investment in aviation, the USVI aims to position itself as a premier destination while creating sustainable economic opportunities.

The Result

The concerted focus on partnerships has yielded remarkable results for the USVI. Despite the challenges posed by the pandemic, the territory has witnessed a resurgence in major airline flights from the continental United States to both St. Thomas and St. Croix. Moreover, the USVI's marketing initiatives have garnered international acclaim, with prestigious accolades from leading publications and organizations.

From January to August 2024, the USVI has already experienced a significant increase in air arrivals, with a remarkable 28% year-over-year growth compared to 2023 and a notable 12% increase over the same period in 2022. Projections for the Continental US Winter 2023/2024 indicate a 25% increase compared to Winter 2022/2023 and a 15% increase versus 2021/2022.

Key partnerships, such as the collaboration with UberSoca Cruise, have amplified the USVI's presence on the global stage. The strategic alliance not only promotes the territory as a vibrant destination but also fosters engagement with younger demographics, paving the way for future generations of visitors.

Furthermore, the USVI's foray into sports tourism has been propelled by strategic alliances with renowned sports organizations. Partnerships with Boston-based Fenway Sports Group and KLUTCH Sports Group have elevated the territory's profile within the sports arena, fostering connections with professional athletes and sports enthusiasts alike.

The US Virgin Islands' success in tourism marketing is a testament to the power of partnerships. By leveraging collaborative ventures with industry leaders and innovative campaigns, the territory has navigated the challenges with resilience and ingenuity. As the USVI looks towards the future, it remains committed to fostering strategic alliances that will propel its tourism industry to new heights, ensuring its position as a premier destination on the global stage.

Looking ahead, the USVI remains poised to capitalize on emerging opportunities and address evolving challenges. By continually innovating and adapting its marketing strategies, the territory aims to maintain its competitive edge in the global tourism market. Through strategic partnerships, bold initiatives, and unwavering dedication, the US Virgin Islands is charting a course towards a future of prosperity and sustainability in tourism.



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:



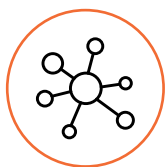
Performance

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



Demand

Chart the travel demand by using flight searches, ticket sales, and recovery indexes.



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.



Market planning

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.



Outbound Market Trends

Track outbound market information on this new subsection under the market planning module that provides key information (seasonality, top destinations, tourist profile) around an origin market of your interest.

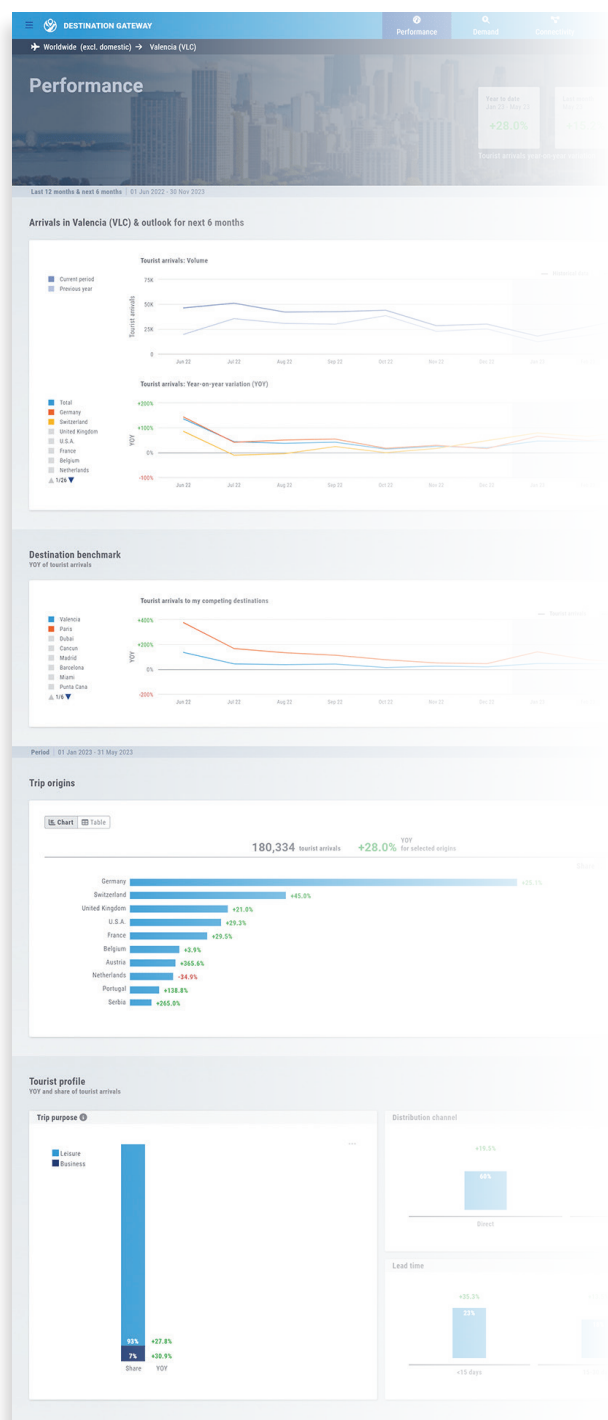


Events

Bring your marketing calendar and data together. Drive and understand demand for travel to your events, being it MICE, cultural or major sports events. Benchmark your market share during key holiday periods.

FORWARDKEYS' DATA SOLUTION FOR DMOs

[LEARN MORE](#)



Data appendix



**Overseas travel in the Caribbean region:
Tourist arrivals and scheduled seat capacity by destination, H1 2024 vs 2023**

Destination	Tourist Arrivals	Seat Capacity
Anguilla	+69%	+99%
Antigua and Barbuda	+9%	+14%
Aruba	+20%	+24%
Bahamas	+6%	+19%
Barbados	+14%	+34%
Belize	+30%	+43%
Bermuda	=0%	+51%
Bonaire	+5%	+53%
British Virgin Islands	+69%	+50%
Cancun (Mexico)	+7%	+7%
Cayman Islands	+11%	+18%
Cuba	+4%	-1%
Curaçao	+24%	+35%
Dominica	+13%	+13%
Dominican Republic	+12%	+14%
Grenada	+19%	+40%
Guadeloupe	-1%	-10%
Guyana	+11%	+27%
Haiti	-52%	-23%
Jamaica	+2%	+2%
Martinique	+4%	-6%
Puerto Rico	+18%	+15%
Saint Barthelemy	-13%	+27%
Saint Kitts and Nevis	+15%	+36%
Saint Lucia	+11%	+17%
Sint Maarten	+19%	+34%
Saint Martin	-62%	-16%
Saint Vincent and the Grenadines	+40%	+55%
Suriname	-4%	+9%
Trinidad and Tobago	+7%	+24%
Turks and Caicos Is.	+16%	+29%
US Virgin Islands	+18%	+30%

Know who's travelling
where and when





PREDICTING TRAVELLERS' IMPACT

Contact us at
info@forwardkeys.com

Check out the latest analysis at
www.forwardkeys.com

