

60
Years



CARIBBEAN
HOTEL & TOURISM
ASSOCIATION



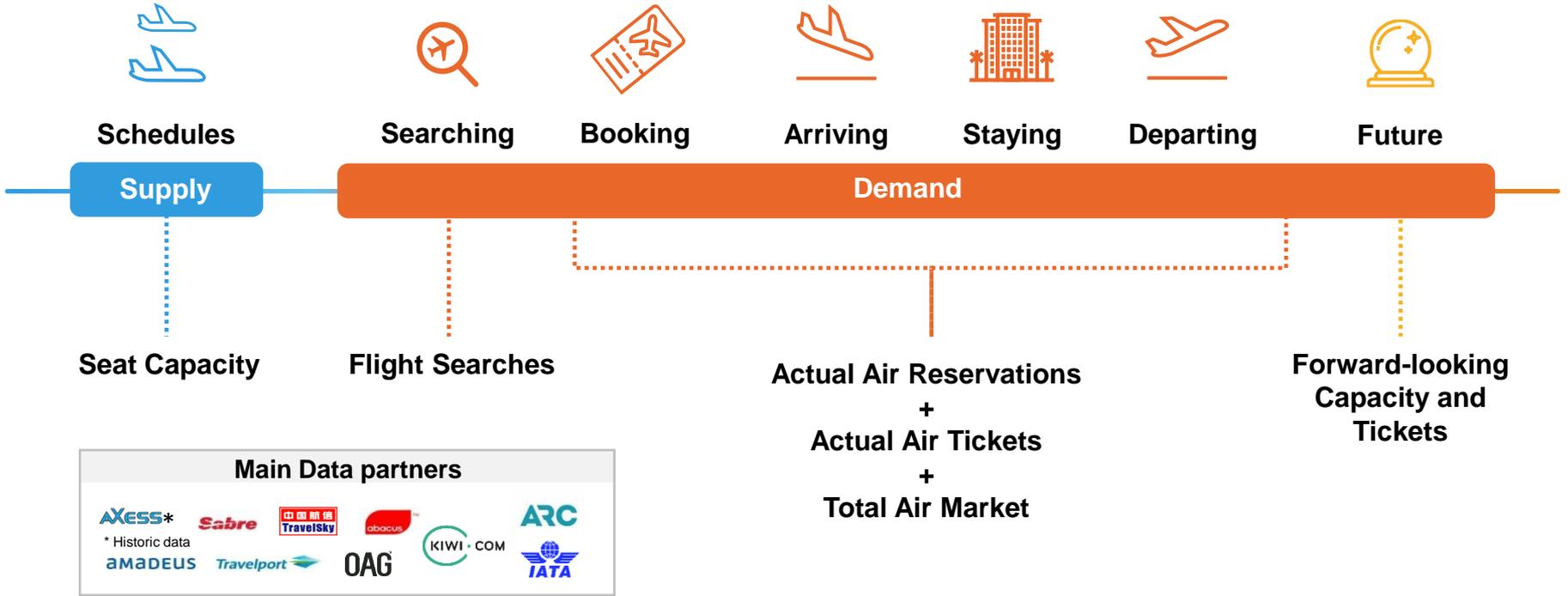
ForwardKeys
PREDICTING TRAVELLERS' IMPACT

Caribbean travel outlook

Olivier Ponti – VP Insights at ForwardKeys

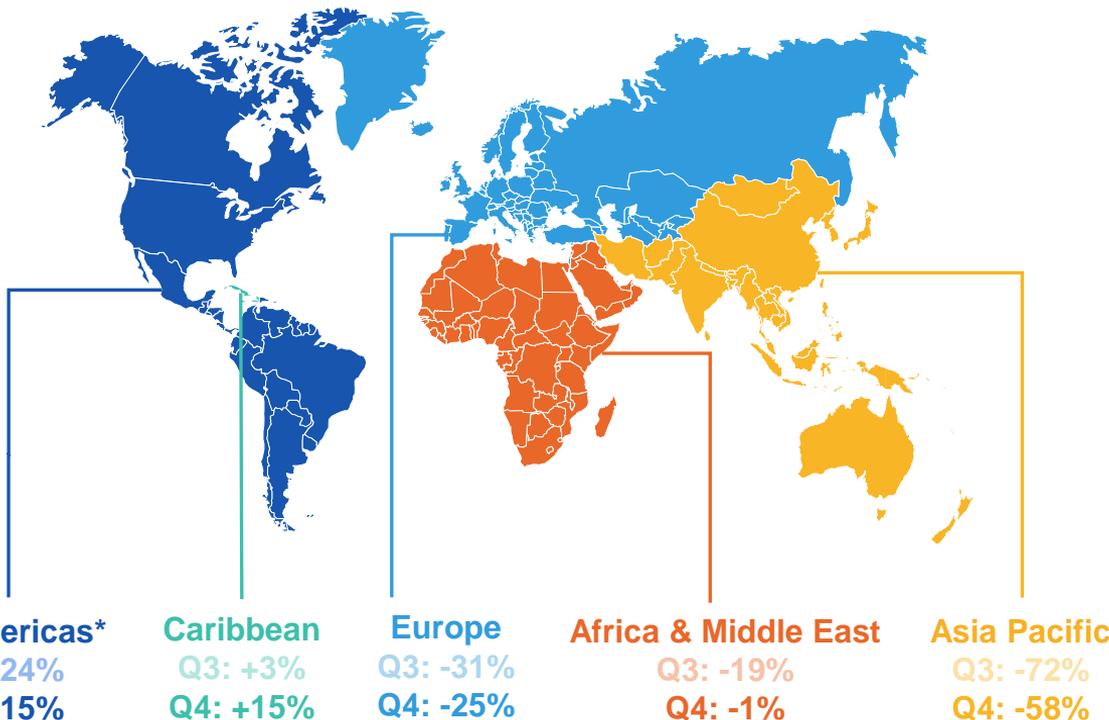
October 2022

ForwardKeys data captures and reflects the entire traveller journey



In Q4, the Caribbean is clearly shifting to “Growth Mode”

International worldwide arrivals in Q3 and Q4 2022, as of 14 September; vs 2019 levels



The Americas*

Q3: -24%

Q4: -15%

Caribbean

Q3: +3%

Q4: +15%

Europe

Q3: -31%

Q4: -25%

Africa & Middle East

Q3: -19%

Q4: -1%

Asia Pacific

Q3: -72%

Q4: -58%

*including Caribbean



Total International Inbound

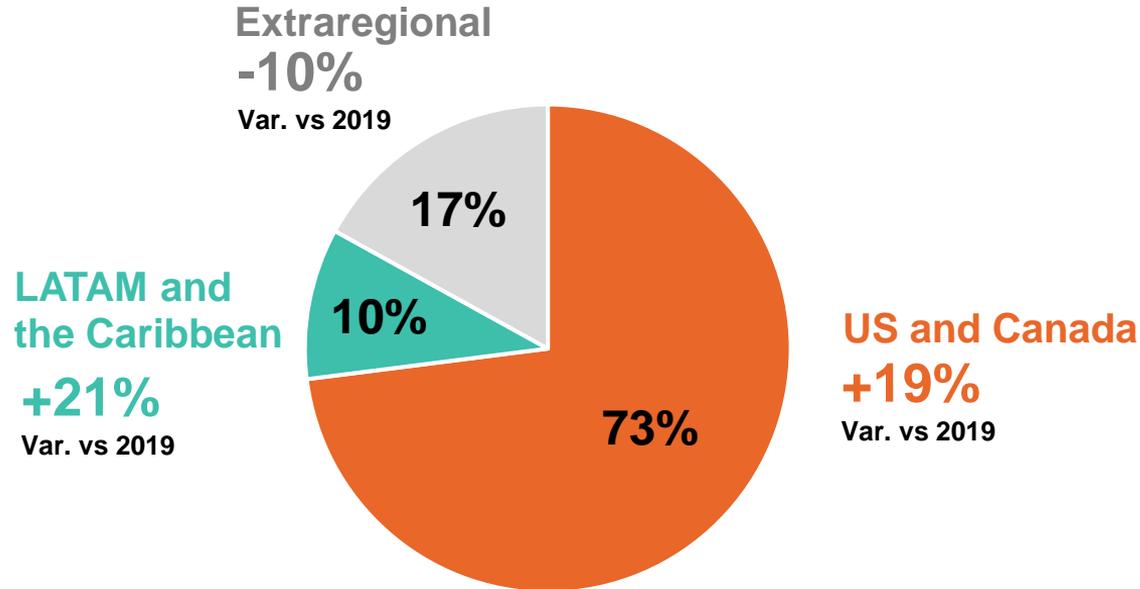
Q3: **-39%**

Q4: **-30%**

 Source: ForwardKeys Air Ticket Data.

Travellers from the Americas are driving the strong performance of the Caribbean

Overseas arrivals to the Caribbean in Q4 2022, as of 19 September; vs 2019 levels



Most resilient origin markets to Caribbean destinations in Q4 2022

Overseas arrivals to Caribbean in Q4 2022, as of 14 September; vs 2019 levels

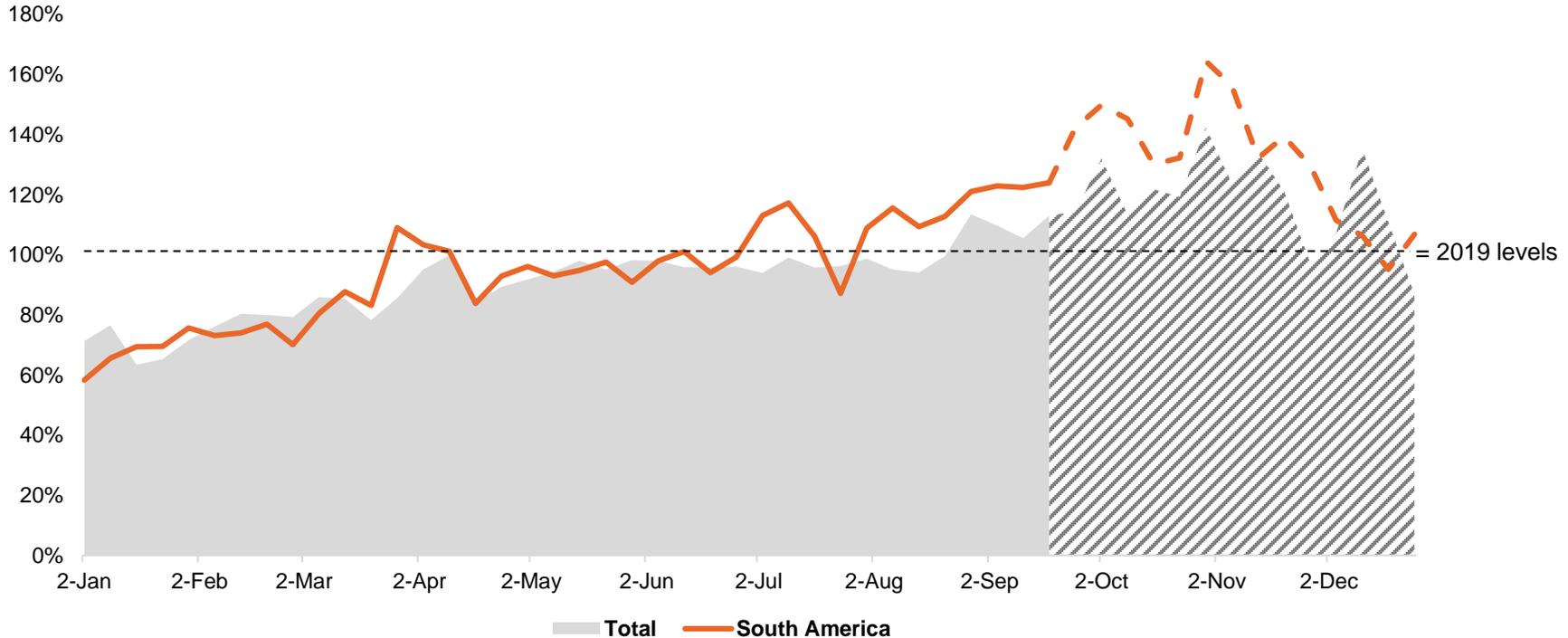
	Origin markets	% change
1 st	Colombia	+54%
2 nd	U.S.A. (mainland)	+18%
3 rd	France (mainland)	+5%
4 th	Netherlands (mainland)	+1%
5 th	Canada	-2%
6 th	Argentina	-5%
7 th	United Kingdom	-19%
8 th	Germany	-28%
9 th	Spain	-30%
10 th	Chile	-35%

*out of origin markets with share in arrivals $\geq 1.0\%$

 Source: ForwardKeys Air Ticket Data.

Arrivals from South America are on the rise

Overseas arrivals to Caribbean in 2022, as of 14 September; vs 2019 levels



Growth accelerates throughout the region in Q4 2022

Overseas arrivals to Caribbean in Q4 2022, as of 14 September; vs 2019 levels

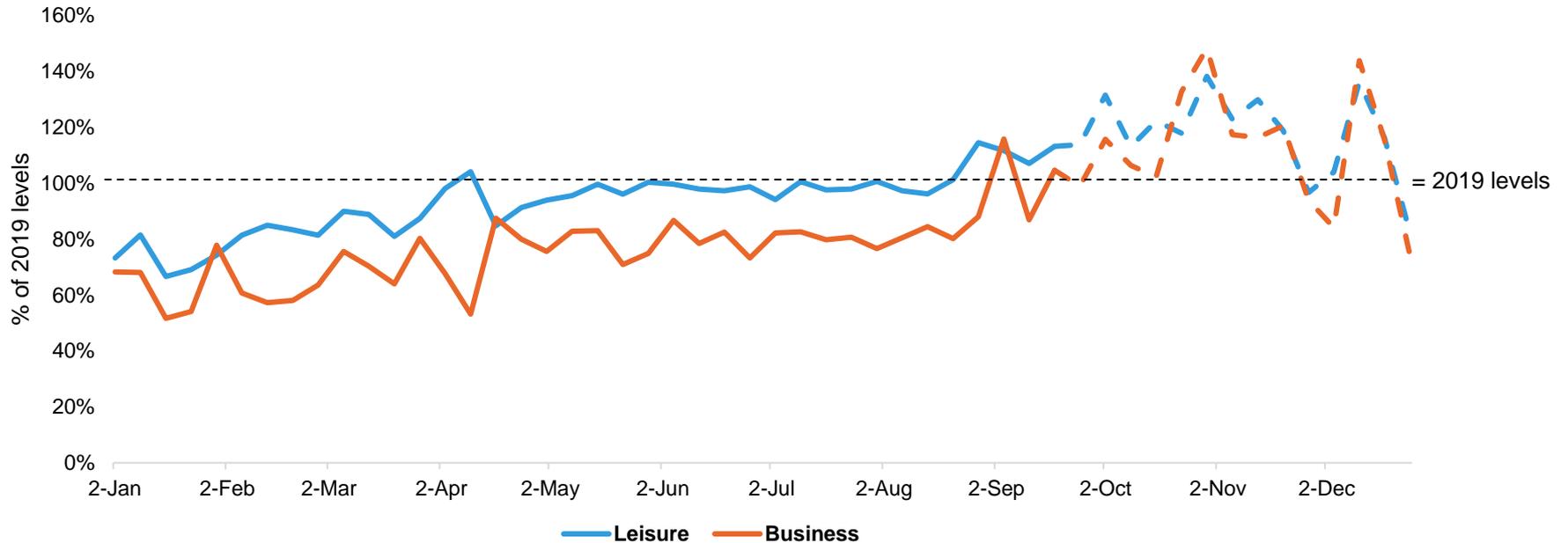
	Destinations	% change
1 st	Dominican Republic	+40%
2 nd	US Virgin Islands	+33%
3 rd	Bonaire	+30%
4 th	Martinique	+26%
5 th	Guadeloupe	+22%
6 th	Turks and Caicos Islands	+21%
7 th	Curaçao	+15%
8 th	Bahamas	+15%
9 th	Jamaica	+8%
10 th	Puerto Rico	+8%

*out of destinations with share in arrivals >=1.0%

 Source: ForwardKeys Air Ticket Data.

Business travel is back and catching up with leisure

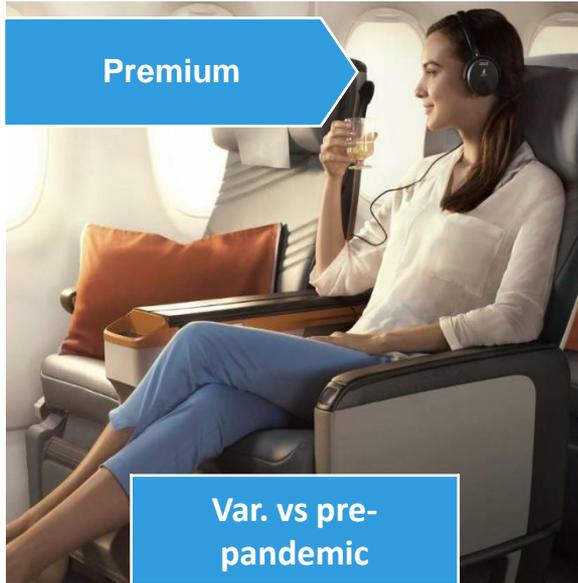
Overseas arrivals to Caribbean in 2022, as of 14 September; vs 2019 levels



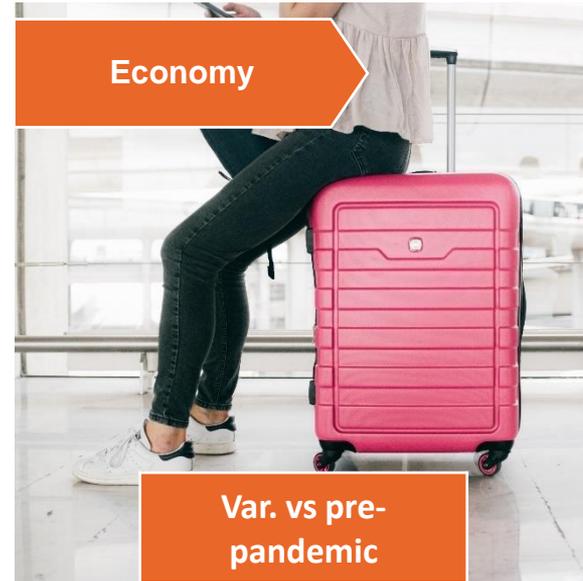
Source: ForwardKeys Air Ticket Data.

Premium cabin classes are leading the recovery

Overseas arrivals to Caribbean in Q3, as of 14 September; vs 2019 levels



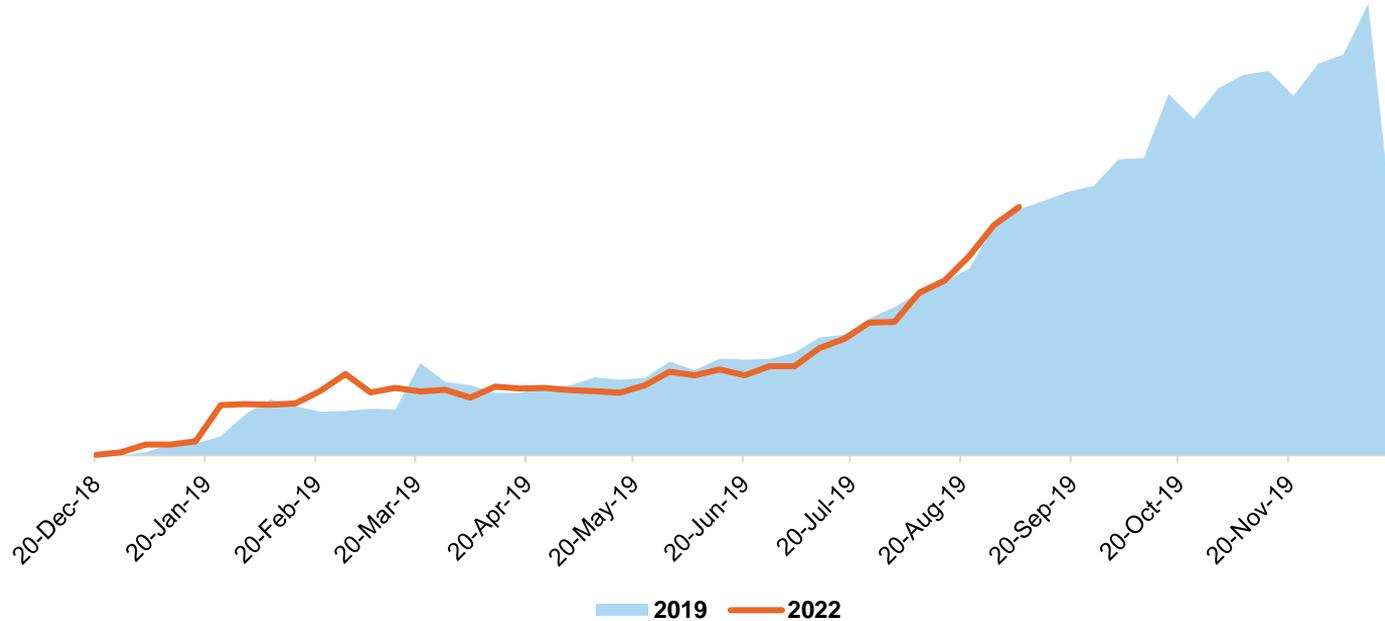
+27%



+1%

Tickets for Christmas follow the same pace as in prepandemic

Tickets issued for overseas arrivals to Caribbean between 19 and 25 December 2022; vs same period in 2019



Source: ForwardKeys Air Ticket Data.



Take-Aways

1

The Caribbean is in a strong position

2

It is time to diversify your source markets

3

Air connectivity remains a key success factor

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