



# LUXURY TRAVEL 2015

*CARIBBEAN HOSPITALITY INDUSTRY EXCHANGE FORUM*

**NATHAN LUMP**  
OCTOBER 1, 2015



**TRAVEL+LEISURE**





# AGENDA

- + STATE OF THE MARKET
- + TODAY'S TRAVELER: THE T+L AUDIENCE
- + HOW T+L ENGAGES THEM
- + MACRO TRENDS
- + FOCUS ON THE CARIBBEAN



# STATE OF THE MARKET

# GROWTH IN PERSONAL WEALTH



**8.4% ANNUAL  
GROWTH RATE  
2000-2014**

**\$263** TRILLION IN 2014  
**\$281** TRILLION IN 2015

**TOP 5 GAINERS**

CHANGE IN PERSONAL WEALTH

|         | <i>\$BILLIONS</i> |
|---------|-------------------|
| US      | <b>\$8,886</b>    |
| UK      | <b>\$2,268</b>    |
| FRANCE  | <b>\$1,335</b>    |
| GERMANY | <b>\$1,188</b>    |
| ITALY   | <b>\$1,099</b>    |



# THE AFFLUENT ARE SPENDING MORE... AND TRAVEL LEADS THE WAY



**6.6%** INCREASE IN LUXURY  
SPENDING IN THE U.S.  
(COMPARED TO 2.9% GDP GROWTH)

| 2015 U.S. FORECAST     | \$ BILLIONS | % CHANGE |
|------------------------|-------------|----------|
| NEW AUTOMOBILE         | \$130.0     | 7.2%     |
| LEISURE TRAVEL         | \$115.2     | 15.9%    |
| DINING OUT             | \$53.9      | 4.8%     |
| ITEMS FOR HOME         | \$53.6      | -0.4%    |
| APPAREL + ACCESSORIES  | \$37.5      | 7.5%     |
| FINE WATCHES + JEWELRY | \$16.6      | -13.8%   |



# TRAVEL IS HOT

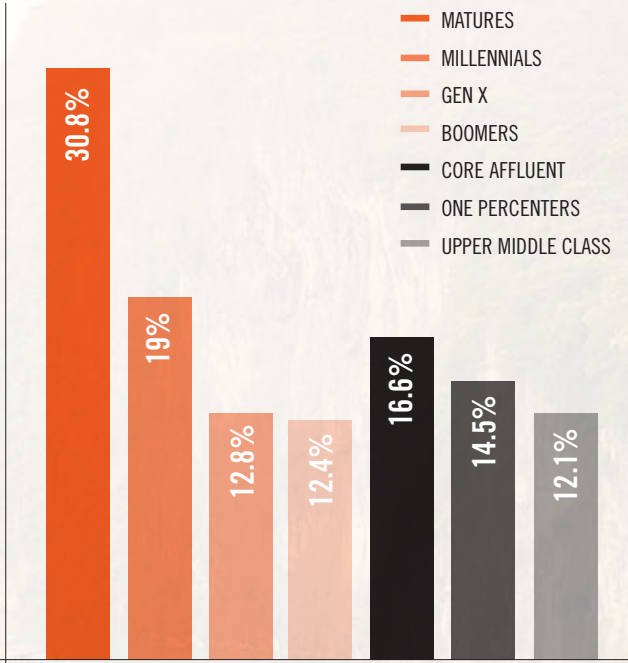
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TRAVEL IS THE TOP DISCRETIONARY SPENDING CATEGORY AMONG U.S. AFFLUENT CONSUMERS

28%

OF HOUSEHOLD DISCRETIONARY SPEND

## INCREASE IN TRAVEL SPENDING BY INCOME + AGE





TODAY'S TRAVELER:  
THE T+L  
AUDIENCE



# OUR LARGEST AUDIENCE IN HISTORY



**6.7 MM** PRINT AUDIENCE  
+18% SINCE 2011

**3.3 MM** DIGITAL UNIQUES  
+44% YOY GROWTH

**5.6 MM** SOCIAL MEDIA FOLLOWERS  
+121% YOY GROWTH

**1.2 MM** NEWSLETTER SUBSCRIBERS  
+8% YOY GROWTH

SOURCE: MRI FALL 2014; OMNITURE 6 MONTH AVERAGE 2015; FB, TWT, INSTAGRAM, LINKEDIN, PINTEREST, GOOGLE+ AS OF DECEMBER 2014



# WHO THEY ARE



## MEDIAN AGE

**50**  
YEARS OLD

**MALE**  
49%

**FEMALE**  
51%

## THE MEANS

**\$158K** MEDIAN HHI

## THE MINDSET

**23**  
AVERAGE TRIPS PER YEAR

**96%**  
HAVE A VALID PASSPORT

SOURCE: 2015 IPSOS AFFULENT SURVEY USA; TRAVEL+LEISURE TRAVEL TRENDS SURVEY, DECEMBER 2013



# INTERNATIONAL TRAVEL

71%

TOOK AN INTERNATIONAL  
TRIP IN THE PAST  
12 MONTHS

10

AVERAGE NUMBER OF  
INTERNATIONAL TRIPS  
IN THE PAST 12 MONTHS

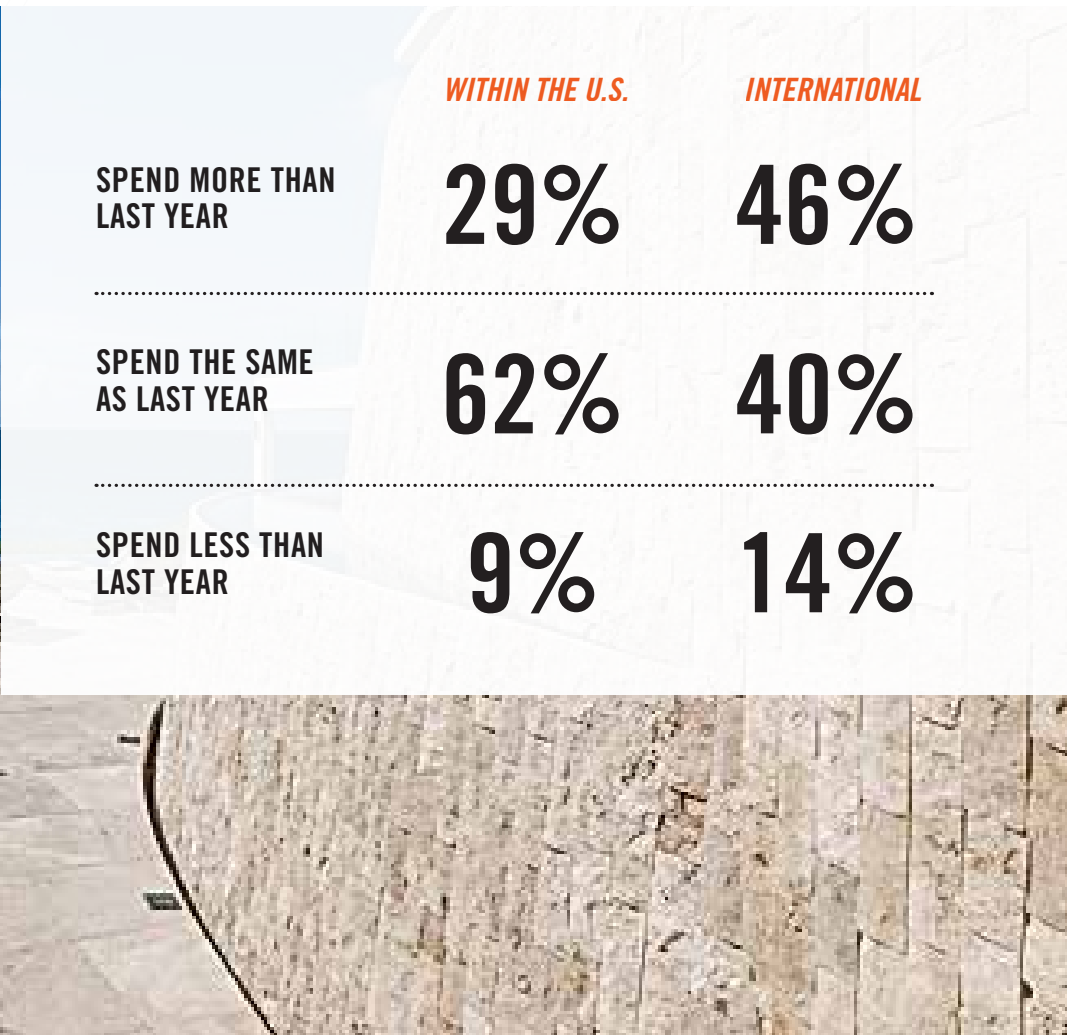
87%

PLAN TO TAKE AN  
INTERNATIONAL TRIP IN  
THE NEXT 12 MONTHS

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, JANUARY 2015; 2015 IPSOS AFFLUENT SURVEY



# SPENDING MORE ON INTERNATIONAL TRAVEL



SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, JANUARY 2015



# VISITING ALL TYPES OF DESTINATIONS

## TYPES OF TRIPS PLANNED IN THE NEXT 12 MONTHS

CITY  
**62%**

BEACH  
**56%**

MOUNTAIN  
**35%**

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY, DECEMBER 2013; CONDUCTED BY ROI RESEARCH INC.



HOW T+L

ENGAGES

THEM



# UNDERSTANDING THE CONSUMER JOURNEY

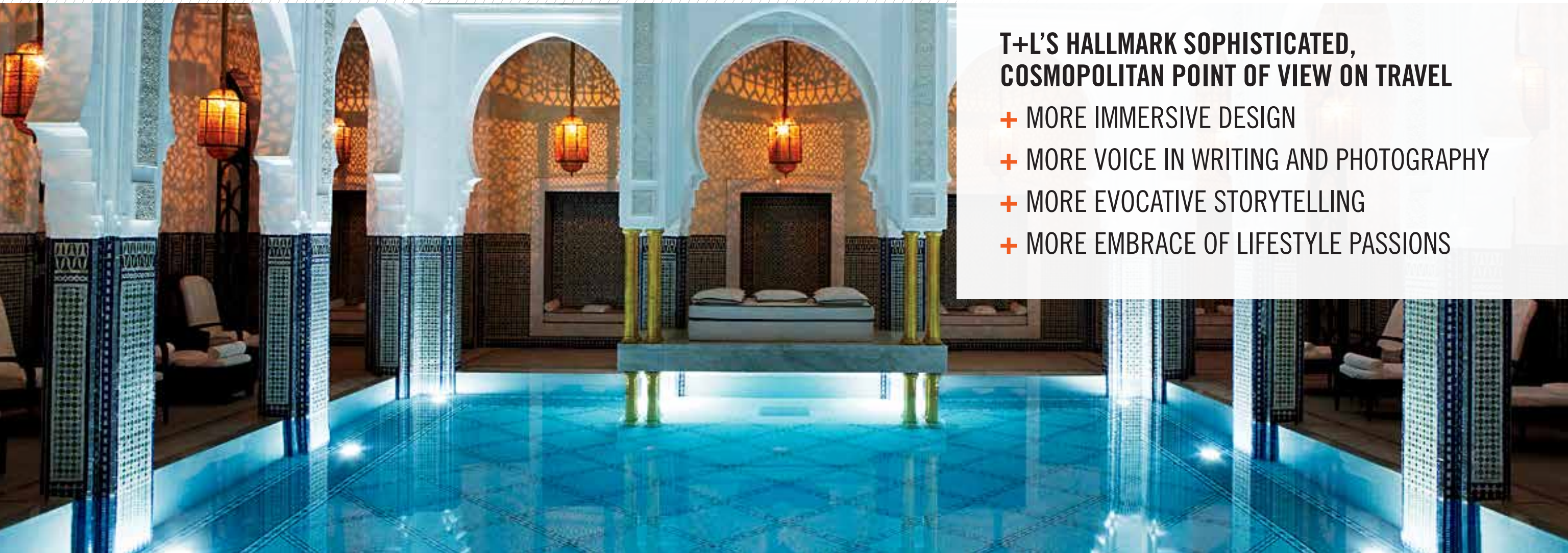
INSPIRATION + ENTERTAINMENT // RESEARCH // PLANNING // BOOKING // TRAVELING // SHARING

PRINT

DIGITAL



# THE NEW TRAVEL+LEISURE

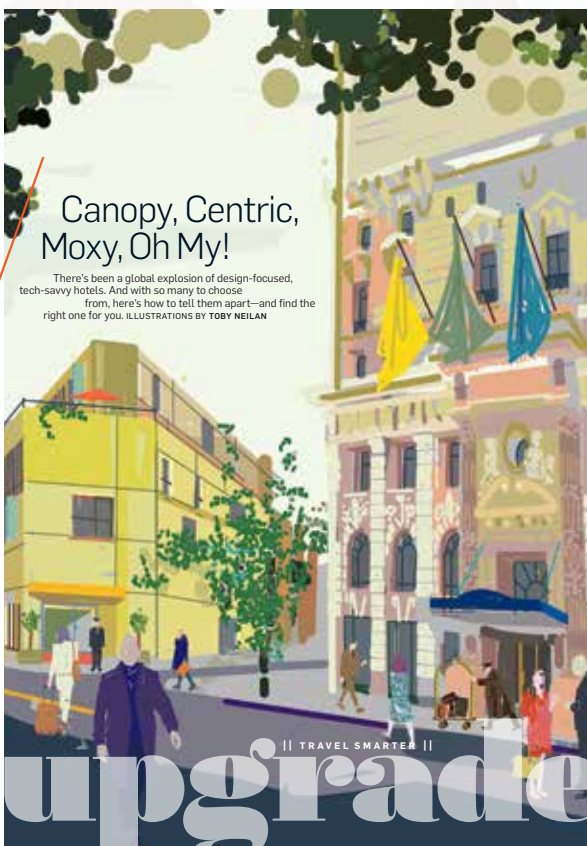


**T+L'S HALLMARK SOPHISTICATED,  
COSMOPOLITAN POINT OF VIEW ON TRAVEL**

- + MORE IMMERSIVE DESIGN
- + MORE VOICE IN WRITING AND PHOTOGRAPHY
- + MORE EVOCATIVE STORYTELLING
- + MORE EMBRACE OF LIFESTYLE PASSIONS



# THE NEW TRAVEL+LEISURE



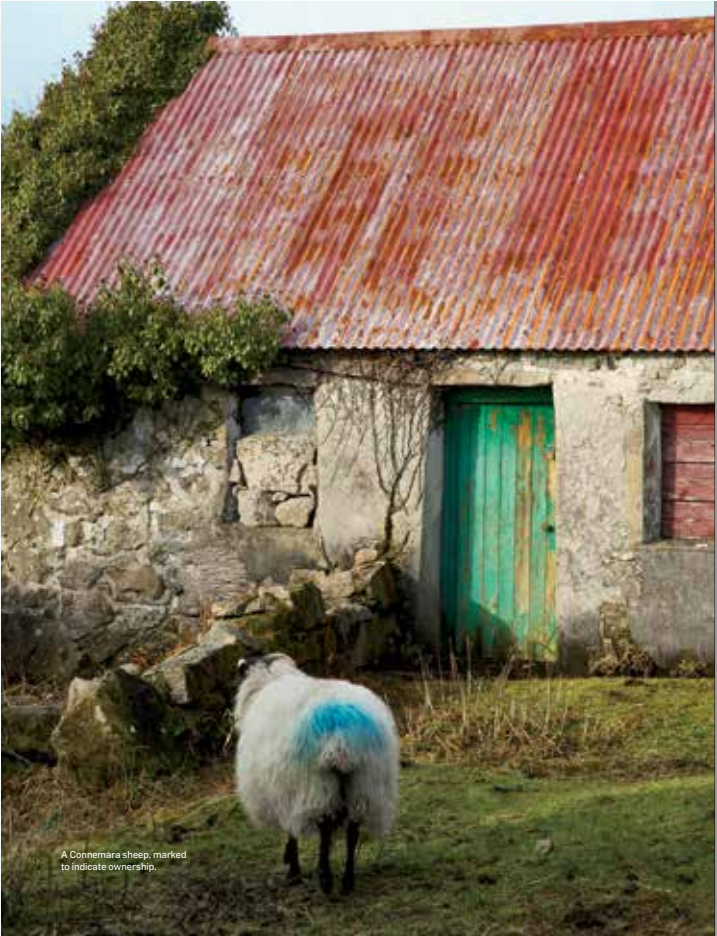


THE  
LONG  
ROAD  
HOME

Nearly three decades after emigrating to America, the novelist Colum McCann finds on every return to Ireland a place that never really lets you go. | Photographs by Jackie Nickerson



Connemara, western Ireland.



A Connemara sheep, marked to indicate ownership.

There are many places in Ireland that haunt me.

There are the rippling waters of Strangford Lough. There's the curl in the river Barrow where the agile water sweeps beneath the stone bridge. There are the tree boughs in Glendalough, beautifully bent by the rigors of weather. There's the swallow darting over the cliff face at Bloody Foreland, turning and returning, time and again.

But there are other places too, much grayer, much darker, and more ordinary. One is the short-term parking lot in Dublin Airport. Most of the time, it is a place of hustle and hum: designed for the quick pickup or the harried goodbye. People zoom in and out. The fluorescent lights flicker. Nobody stays much more than an hour or two. It is, after all, the most expensive parking lot in the airport. But every now and then it becomes the saddest, most poignant place in the country. A car pulls in. The barrier rises. A family piles out. They struggle with their suitcases. They walk toward the terminal. You can recognize them by the tears streaming down their faces. Eventually, the authorities realize that a car has been in short-term parking longer than it should be. On the front seat, they find mortgage papers. In the glove box, they find the terms of the car lease. In the backseat they find a child's toy or a school textbook. The family is not coming back. They are done with Ireland, or Ireland is done with them. They are on their way to London, or Dresden, or New York, or Sydney, to make a new life away from the country that will always, in some way or other, haul them home.

Everyone knows the story of leaving something adored behind. But nobody leaves quite like the Irish. We have been going for centuries. We left on coffin ships for America. We left on cattle boats for England. We left on jelliners for the seven continents. We have had myriad reasons for leaving—the hunger, the economy, the pettiness, the greed, the stranglehold of the church—but perhaps one other reason we leave is because we want to remember, and nobody remembers quite as powerfully as those who have left everything behind. Leaving is a form of memory-making. There is, in the emigrant, a desire to wound himself or herself. The emigrant carries the scar in order to remember the moment of loss. This act skirts close to nostalgia and sentimentality, but also to violence and love.

I have been gone from Ireland for almost 30 years, yet I can't shake the word "home" from my idea of her. I try to maintain a good degree of skepticism about where I came from because my country is, in so many ways, a spectacular ruin. Our sad love songs. Our happy wars. Our stunned submission to power. Our silent complicity with financial thugery. Our willingness, especially early in the 21st century, to let our heritage be demolished. Ugly ring roads were allowed to encircle one of Ireland's most mythical sites, the ancient Hill of Tara. Office buildings went up in Cork and Limerick

without regard to taste or landscape. Cranes swung like toys over the skyline of Dublin. "Model" villages were built in the middle of nowhere, only to become ghosts.

But it is the essence of human instinct to be able to hold two or more contradictory ideas at once. What you can love, you can hate. What you can miss, you can revisit. What you lie about, you can reimagine. The truth is that I love coming home to Ireland. I feel as if it pries my rib cage open. I feel a pour of cold water along the hollow of my spine when I pass that short-term parking lot in Dublin Airport, because I know that I am picking up a part of myself that I left behind.

I want, immediately, to drive out toward the valley of Glendalough, where the light is more agile than anywhere else in the world. I want to head north to the farmland around Derry, where I feel like a younger version of me inhabits my older, more tired body. I want to walk west to Connemara and spend some time in a small patch of bog-land where the soil leaves tea-colored stains on the cuffs of my jeans. I want to swim at Sandycove in what Joyce called "the scrotumtightening sea." I want to take a kayak around the Aran Islands and call out to the ghosts of J. M. Synge and all the playboys of the western world. I want to wander through Belfast along the murals of the peace walls. I want to watch a flock of long-billed snipe rise from the grass around Faha. I want to find myself marveling at a piece of colored sheep's wool making beautiful a strand of barbed wire on a fence near Roundwood. I want to scuff up my liver in the quiet snug of the Stag's Head in Dublin. I want to hear the music filtering out from Leo's Tavern in Gweedore. I want to spend time with that man on the corner in Stoneybatter who looks like he wears a storyteller's hat.

Walking is so often the cure for me. I have, over the years, walked from Dublin to Galway, and from Belfast to Kerry. I strap on a pair of boots and stuff a sleeping bag into a backpack, tuck away a naggin of whiskey in the side pocket, and off I go. Back roads. Walking trails. Rutted laneways. Puddled tracks. Sleeping under stars that appear like rifle holes in the night. Hunkering under sheets of corrugated tin in old cowsheds to wait out the inevitable rain. These trips return me to what I want to be. And they also return me to what I want my own Ireland to be.

Landscape is character. Character is fate. Fate is belief. There is nothing more wonderful than topping a hill in the middle of an ordinary afternoon and looking down on the quarrel of green fields, and the wander of stone walls, and the squabble of river, and believing, once again, in your country—that place you left behind in order to rediscover the feeling that trills in your heart at that very moment, a sort of short-term parking of the soul.

Gone, in order to come back. ☪



# THE NEW TRAVEL+LEISURE



At the steps of Pont Alexandre III. ON WALK: 1.477. Nina Ricci dress and shoes. ON JEANNE: Dior dress and shoes. See Buyer's Guide, page 189.

Two of the city's "It" girls—model of the moment **Jeanne Damas** and her friend, the artist **Marieke Gruyaert**—take spring's latest looks for a twirl. Plus: T+L picks the top new restaurants in town.

PHOTOGRAPHS BY ALISTAIR TAYLOR-YOUNG | STYLED BY ETHEL PARK

# Paris March



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A cocktail at Caffè Stern. Pedro del Hierro Madrid dress. Charvet scarf. OPPOSITE: AT Les Chouettes. ABOVE: ON MARIEKE: 3.1 Phillip Lim jacket. Damià Doma jacket. ON JEANNE: Anthony Vaccarello jacket. T by Alexander Wang shirt. BELOW: ON MARIEKE: Gucci dress. ON JEANNE: Gucci dress. Calvin Klein Collection shoes. See Buyer's Guide, page 189.





ntine

In-the-know travelers have been buzzing about Puglia's arrival as the next big Mediterranean hot spot, but that's news to Puglia. Devin Friedman goes to the sun-swept region in southern Italy and discovers an enduringly unbuttoned and decidedly local summer refuge.

PHOTOGRAPHS BY MASSIMO VITALI

bluevalentine

SOMEONE TOLD ME THAT IF I WENT TO PUGLIA I should go to Ennio Capasa's beach club. This was a person who knows figures like Ennio Capasa, the creative director and proprietor of the fashion label Costume National. I said sure, if you can set that up I would be happy to go to the beach club of the Costume National guy; it would surely be better than whatever else I'd be doing. Which is how I ended up sitting at Ennio Capasa's beach club, La Castellana, discussing his passionate theory about why Puglia is the last great unspoiled summer place in Italy. By that point, afternoon had begun to take hold. Out on the water it was still bright as midday, but on the beach shadow was now overtaking us. There was a small restaurant with a tiny outdoor kitchen at the far end of La Castellana, and tables set up on a small lawn. The cook, a woman in a striped apron, was throwing small fish called triglie onto the grill. When they came out on plates they had browned and curled like burned paper. For the children there was meatball lasagna, and parents were trying to coax a group of boys who were playing beach soccer into having something to eat. Ennio ordered for us and began to lay out his aesthetic philosophy of Puglia. That it turned out to be ardent and intense should surprise no one: both fashion designers and Italians tend to be deadly serious about their aesthetic philosophies. He began with a Socratic question: So what do you think of this place? My wife and two kids and I had come to Puglia to stay with our friends David and

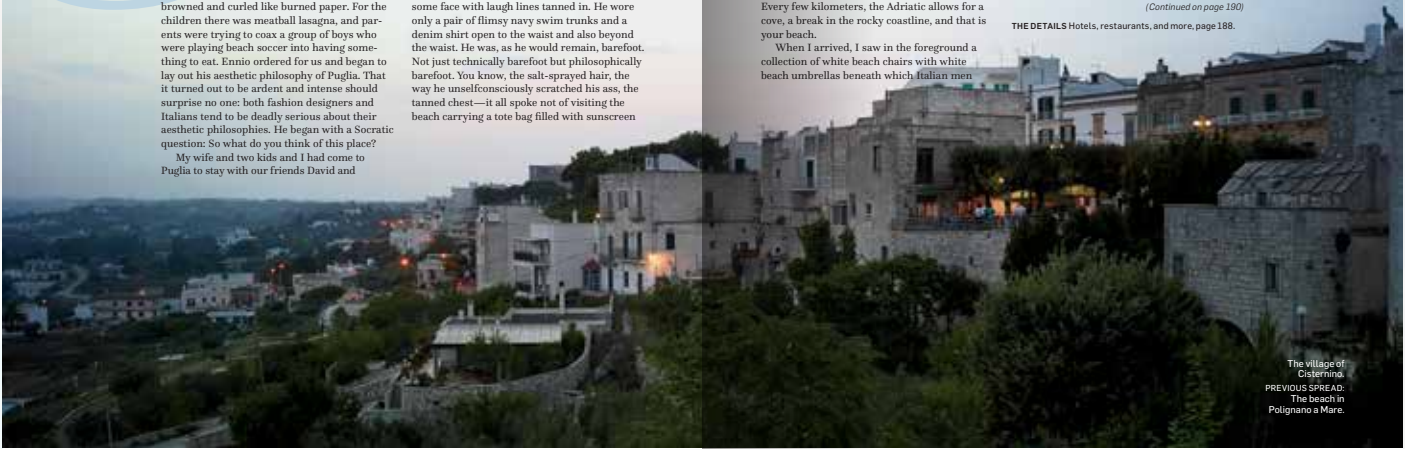
Francesco, up the coast, and we'd driven down that morning to meet Ennio. Where should we meet you, I'd asked when I called him to make plans. Oh just meet me in town, Ennio said, meaning Otranto. Otranto was teeming. It's on the heel of the boot, the Italian extremity, the easternmost town in Italy, a fortified village built onto promontory rocks, and beneath it is the gorgeous Korean Airlines blue of the Adriatic. You can theoretically see Albania across the sea from here. Its beauty is not precious and painfully reconstructed like the beautiful Renaissance towns of Tuscany. There are low-slung slabs of concrete near the famous, centuries-old historic cathedral. (I don't normally go in for centuries-old historic cathedrals, but this one features some insane Romanesque mosaic tile work possessed of a distinctly pre-Christian flavor and features what look like donkey mermaids in flagrante delicto.) Ennio had found us pulled over on a road in town and leaped from his car with an irrepressible energy. "Welcome, welcome!" he said. Ennio: thick black hair, a virile beard, a handsome face with laugh lines tanned in. He wore only a pair of flimsy navy swim trunks and a denim shirt open to the waist and also beyond the waist. He was, as he would remain, barefoot. Not just technically barefoot but philosophically barefoot. You know, the salt-sprayed hair, the way he unconsciously scratched his ass, the tanned chest—it all spoke not of visiting the beach carrying a tote bag filled with sunscreen

and sweaty cheese sandwiches, but of rolling out of bed and down to the beach and then back up to a table for some bracing white wine and olives and cheese and fresh fruit every day for the whole summer. I felt instantly jealous of his life and worried I would never belong to a place the way he does. He had us follow him in his car. More about La Castellana. It's like one minute you're cramming your little Opel or Renault into a bathtub-size parking space right in the middle of Otranto's hectic center where people are beeping horns and haggling over the cost of fish heads for their soup, and the next minute you've emerged from a little rocky track onto this wedge of beach that's hidden in plain sight. A 100-yard-wide spit of sand that spills into the sea not far from the little fishing port. Puglia isn't this endless spread of verdant green with wide sandy beaches. It's economical with all indulgence save for sunlight and olive trees. Every few kilometers, the Adriatic allows for a cove, a break in the rocky coastline, and that is your beach. When I arrived, I saw in the foreground a collection of white beach chairs with white beach umbrellas beneath which Italian men

read salmon-colored newspapers through scrimps of their own fragrant cigarillo smoke. Beyond were tranquil aquamarine shallows where beautiful Italian moms stood in sarongs smoking cigarettes and talking to each other while at their knees swam beautiful children. Everywhere was the soft sheen of lives lived mostly sheltered from hardship. Do you ever feel like people are having amazing vacations in little places you can never find? Well, in Otranto they're at La Castellana. Italians who've been coming here for generations. Kids who grew up here and now take their kids here. The shadows were now drawing longer and Ennio fastened a button on his shirt as he waited for my answer. "Yes," I said to him. "Of course I like it here. It's the best place in the world." Ennio agreed. He was expansive when it came to why Puglia was the best place on earth. It was the quality of the red, Martian-y soil, he said. The low humidity. The dry rocky terrain and the dry crusty bread. The waters between here and Albania, he said, were so narrow that all manner of aquatic life was forced through a

(Continued on page 180)

THE DETAILS Hotels, restaurants, and more, page 188.



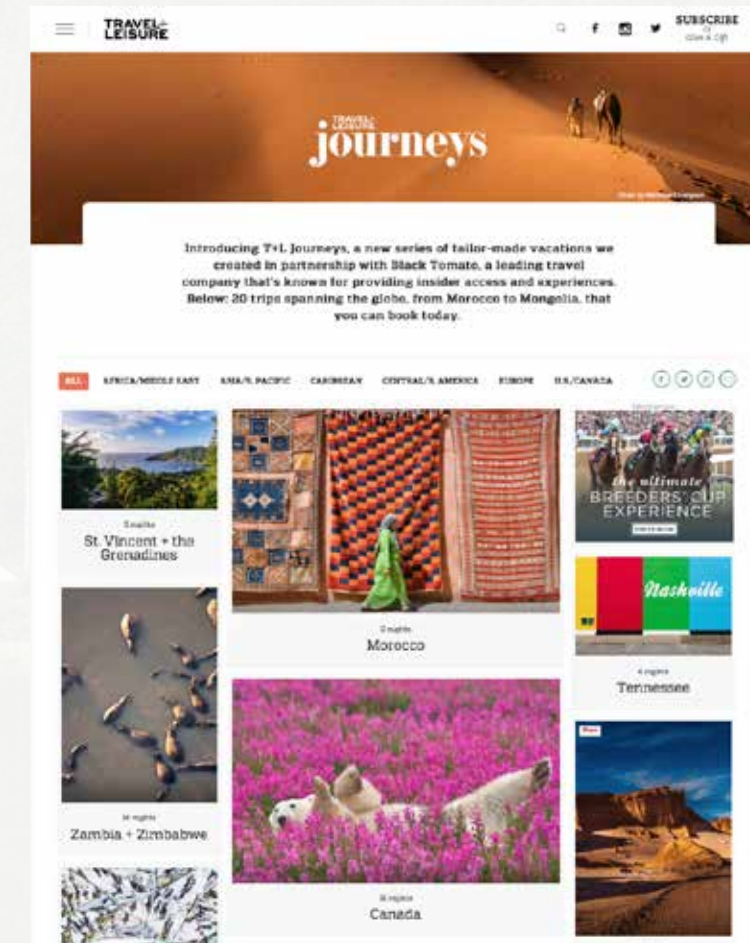
The village of Otranto. PREVIOUS SPREAD: The beach in Polignano a Mare.



# THE NEW TRAVELANDLEISURE.COM

## T+L'S HALLMARK SOPHISTICATED, COSMOPOLITAN POINT OF VIEW ON TRAVEL

- + HIGH-VELOCITY PUBLISHING VOLUME
- + HEIGHTENED FOCUS ON VISUALS
- + RANGE OF CONTENT TYPES
- + NEW UTILITIES
  - > TRAVEL + LEISURE JOURNEYS
  - > DESTINATION GUIDES





# MULTIPLE TOUCHPOINTS





# 5 MACRO TRENDS



# EXPERIENCE COLLECTORS



## THE RISE OF THE EXPERIENCE-FIRST, DESTINATION-SECOND TRAVELER

AUTHENTICITY / UNIQUENESS / DISCOVERY

“PEOPLE ARE FEELING COMFORTABLE ABOUT SPENDING AGAIN, BUT THEY SEEM MOST LIKELY TO WANT TO SHELL OUT FOR **MEMORABLE EXPERIENCES.**”

*WASHINGTON POST, REPORTING ON MASTERCARD DATA (2015)*

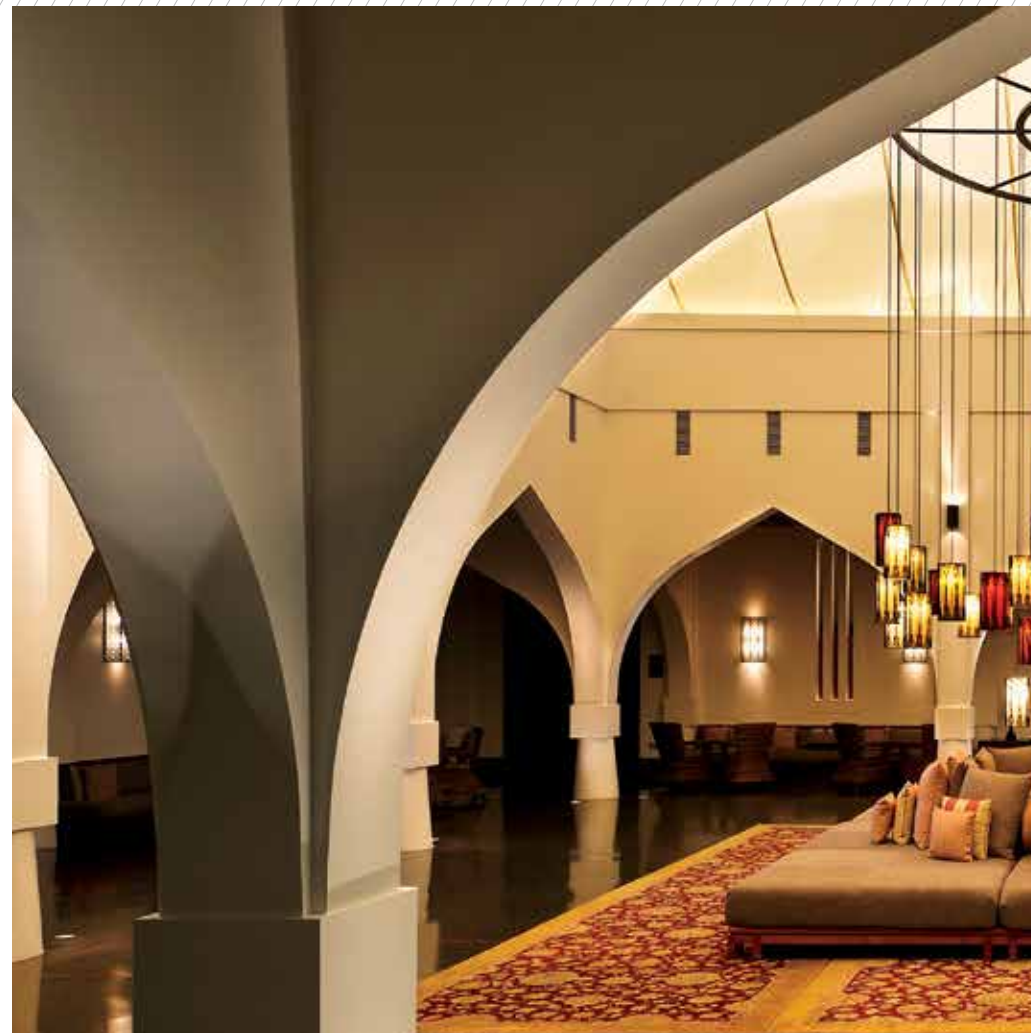
**78%** OF MILLENNIALS CHOOSE TO SPEND MONEY ON A **DESIRABLE EXPERIENCE** OR EVENT OVER BUYING SOMETHING DESIRABLE.

*EVENTBRITE MILLENNIAL SURVEY (2014)*

**THE EASTERLIN PARADOX:** SATISFACTION WITH THINGS PEOPLE BUY GOES DOWN OVER TIME; SATISFACTION WITH EXPERIENCES THEY SPEND MONEY ON GOES UP.



# TRAVEL BY PASSION



## FOOD + WINE

**86%** TRAVEL TO TRY REGIONAL RESTAURANTS AND LOCAL FOOD

**41%** TRAVEL TO WINE REGIONS

## SHOPPING

**71%** SPEND AS MUCH OR MORE TIME SHOPPING WHILE TRAVELING THAN THEY DO AT HOME THANKS TO “UNIQUE ITEMS AND STORES”

## ART, ARCHITECTURE, DESIGN

**84%** TRAVEL FOR CULTURAL ENRICHMENT

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY 2015



# VALUE FOR TIME



## THE ULTIMATE DETERMINANT OF WORTH

**94%** WORK AT LEAST 50 HOURS A WEEK;  
NEARLY HALF WORK MORE THAN 65 HOURS.  
*HARVARD BUSINESS SCHOOL STUDY OF PROFESSIONALS*

U.S. EMPLOYEES USE ONLY **51%** OF THEIR PAID VACATION TIME.  
*GLASSDOOR SURVEY 2015*

**42%** OF AMERICANS TOOK ZERO DAYS OFF LAST YEAR.  
*GOOGLE CONSUMER NEWS SURVEY*





# FAMILY + GROUP TRAVEL



**BEACH  
VACATIONS  
#1**  
.....  
60%

## MULTI-GENERATIONAL FAMILIES

**66%** WILL TAKE A MULTI-GEN TRIP IN THE NEXT 12 MONTHS

## ... BUT IT'S ALSO

MULTIPLE  
**FAMILIES**

MULTIPLE  
**COUPLES**

GROUPS OF  
**FRIENDS**

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY 2015



# THE SHARING ECONOMY



UBER



SURFAIR



BEACON.

BlackJet



**65%**

OF TRAVEL + LEISURE READERS  
KNOW AIRBNB

**94%**

OF THOSE WHO'VE USED AIRBNB  
HAVE HAD A POSITIVE EXPERIENCE

**25%**

HAVE PLANS TO USE IT

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY 2014



FOCUS ON THE  
CARIBBEAN



# YOU'RE POPULAR

EUROPE AND THE CARIBBEAN LEAD THE WAY  
AMONG INTERNATIONAL DESTINATIONS



SOURCE: TRAVEL + LEISURE TRAVEL ADVISORY BOARD (TAB )TRAVEL TRENDS SURVEY, APRIL 2015



# WHERE THEY TYPICALLY GO



|   |                              |    |                          |
|---|------------------------------|----|--------------------------|
| 1 | UNITED STATES VIRGIN ISLANDS | 6  | BRITISH VIRGIN ISLANDS   |
| 2 | BAHAMAS                      | 7  | CAYMAN ISLANDS           |
| 3 | JAMAICA                      | ↓  | ST. MARTIN / ST. MAARTEN |
| 4 | PUERTO RICO                  | ↓  | BERMUDA                  |
| 5 | ARUBA                        | 10 | DOMINICAN REPUBLIC       |

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, SEPTEMBER 2014



# WHERE THEY ARE GOING THIS YEAR



|   |                               |     |    |                          |     |
|---|-------------------------------|-----|----|--------------------------|-----|
| 1 | BAHAMAS                       | 23% | 6  | ST. MARTIN / ST. MAARTEN | 14% |
| 2 | UNITED STATES VIRGIN ISLANDS  | 22% | 7  | BRITISH VIRGIN ISLANDS   | 14% |
| 3 | PUERTO RICO                   | 21% | 8  | DOMINICAN REPUBLIC       | 13% |
| 4 | <b>TURKS + CAICOS ISLANDS</b> | 17% | 9  | <b>SAINT LUCIA</b>       | 12% |
| 5 | JAMAICA                       | 16% | 10 | CAYMAN ISLANDS           | 12% |

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, JANUARY 2015  
BASE: TRAVELERS TO THE CARIBBEAN AND BERMUDA IN THE COMING YEAR



# HOW MUCH THEY SPEND



IN 2014,  
T+L AMERICAN EXPRESS  
CARD MEMBERS SPENT  
**\$111 MILLION+**  
IN THE CARIBBEAN

**39%** MORE THAN THE AVERAGE AMERICAN  
EXPRESS CARD MEMBER AND **+2%** VS. 2013

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, JANUARY 2015



# WHAT LURES THEM



- 1 SCENERY/LANDSCAPE
- 2 CLIMATE/WEATHER
- 3 HOTEL/RESORT OPTIONS
- 4 VALUE FOR PRICE PAID
- 5 EASE OF TRAVEL (E.G., DIRECT FLIGHTS, MINIMAL GROUND CONNECTIONS, ETC.)
- 6 RECREATIONAL SPORTS
- ↓ CULTURAL EXPERIENCES + ATTRACTIONS (E.G., MUSEUMS, HISTORICAL SITES, ETC.)
- 8 DINING/CULINARY EXPERIENCES
- 9 IT'S ON MY LIFE LIST
- 10 VISITING FAMILY/FRIENDS

BASE: VISITED CARIBBEAN IN THE PAST 3 YEARS OR PLAN TO VISIT IN THE NEXT 12 MONTHS  
SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, SEPTEMBER 2014



# THE DESTINATION LANDSCAPE: CUBA IS THE NEW KID ON THE BLOCK



82%

PLAN TO TRAVEL TO CUBA  
IN THE FUTURE

5%

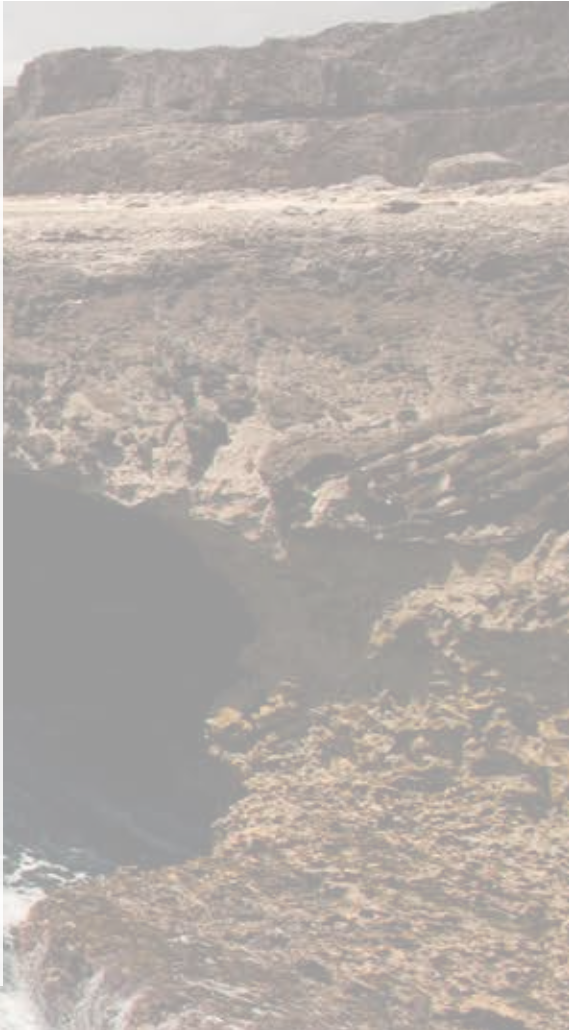
PLAN TO VISIT WITHIN  
THE NEXT YEAR

18%

PLAN TO VISIT WITHIN  
THE NEXT 2-3 YEARS

59%

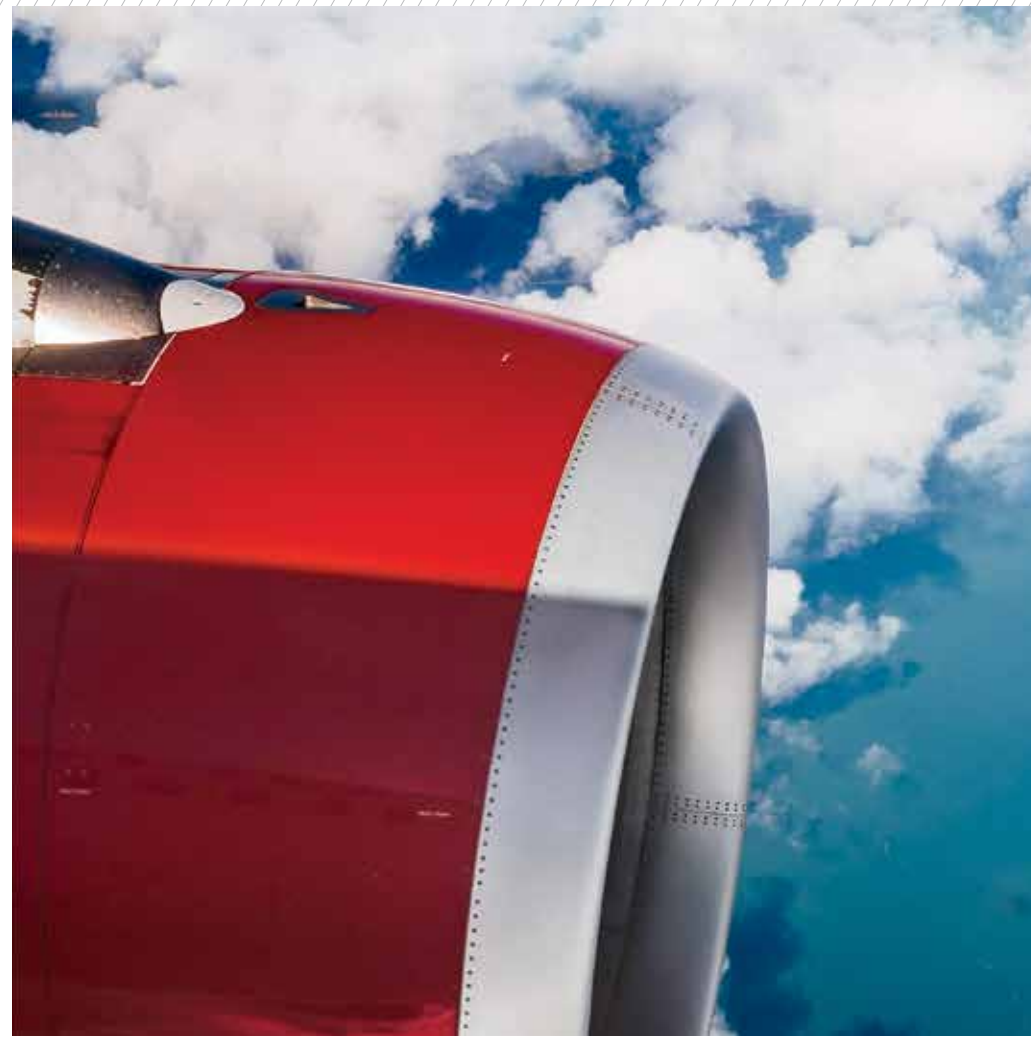
DO NOT CURRENTLY HAVE PLANS  
TO VISIT BUT ARE CONSIDERING  
IT FOR THE FUTURE



SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, JUNE 2015



# THE DESTINATION LANDSCAPE: DIRECT FLIGHTS REMAIN A HUGE WIN



NON-STOP ROUTES/MINIMAL CONNECTIONS ARE THE  
**#1 FACTOR**



SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY 2015



# THE DESTINATION LANDSCAPE: CRUISES CAN SELL A DESTINATION



**35%**

OF T+L READERS REVISIT A  
DESTINATION FIRST EXPERIENCED  
AS A PORT OF CALL

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY 2015



# THE DESTINATION LANDSCAPE: HOTEL LOYALTY WANES



SINCE 2007, AFFLUENT TRAVELERS WHO FAVOR A LUXURY HOTEL BRAND HAS DECLINED BY

**-81%**

TODAY, ONLY **15%** ARE BRAND LOYAL

SOURCE: TIME INC. & YOUNG & RUBICAM AFFLUENCE & WEALTH SURVEY 2015



# THE DESTINATION LANDSCAPE: TOP FACTORS THAT DRIVE HOTEL BRAND LOYALTY



- 1 QUALITY OF ACCOMMODATIONS
- 2 MEMBERSHIP IN LOYALTY REWARDS PROGRAM
- 3 UPGRADES/AMENITIES
- 4 QUALITY OF CUSTOMER SERVICE
- 5 VALUE FOR PRICE PAID
- 6 ATMOSPHERE
- 7 QUALITY OF DINING OPTIONS
- 8 SPA/FITNESS CENTER FACILITIES AVAILABLE

BASE: HOTEL BRAND LOYALISTS: REMAIN LOYAL TO THE SAME HOTEL BRAND  
SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, SEPTEMBER 2014



# THE DESTINATION LANDSCAPE: WHAT GUESTS EXPECT FROM TOP HOTELS



- 1 COMPLIMENTARY WIFI/INTERNET
- 2 COMPLIMENTARY BEVERAGES
- 3 PREMIUM SPA OFFERINGS
- 4 ENHANCED FITNESS FACILITIES/PROGRAMS
- 5 TRANSPORTATION (I.E. TO/FROM AIRPORT, AROUND TOWN, ETC.)

SOURCE: TRAVEL + LEISURE TRAVEL TRENDS SURVEY CONDUCTED BY WYLEI, JUNE 2014



An aerial photograph of a tropical atoll, likely in the Maldives, showing vibrant turquoise water with varying depths and sandy islands. The sky is a clear, bright blue with scattered white clouds. The word 'EXPECTATION' is written in large, bold, black capital letters in the upper left quadrant.

# EXPECTATION

SUPERIOR PRODUCT = UTILITY + EMOTION

# DESIRE

EXPERIENCE > PRODUCT