



Data Trends to Caribbean Tourism Industry Update

January 29, 2019



AGENDA

- Digital Trends and Demos
- Caribbean / Resort Travel
- Buying Behavior



ADARA Is The World's Travel Data Co-op

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- The phrase “BIG DATA” has been trending now since 2011 – but began in the form as we know it with the on-set of Web 2.0 in 2005
- ADARA COLLECTS, ORGANIZES, ANALYZES AND MONETIZES TRAVEL AND TOURISM DATA
- ADARA SAFELY & SECURELY WAREHOUSES THE ON-LINE BEHAVIOR OF OVER 750MM MONTHLY TRAVEL SHOPPERS AND BOOKERS

ADARA Is The World's Travel Data Co-op

With 200+ trusted travel brands, we have a simple vision of growing the travel industry together

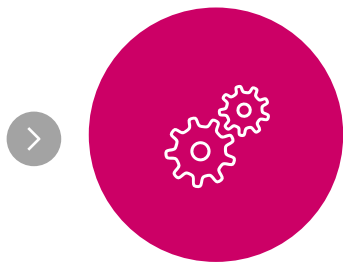


Why Travel Data Matters



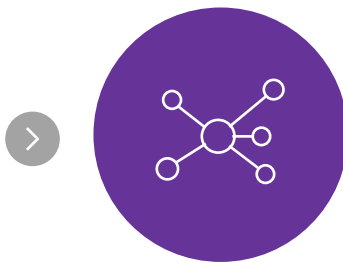
Consumer

COLLECTABLE



Booked a flight
to ST. MAARTEN
on
American.com,
1K Frequent
Flier, tickets for 4

CONNECTABLE



Needs a hotel
in St. Maarten,
with
accommodation
for 4 people

PREDICTABLE



Has traveled to
Caribbean **every**
year for the last 3
years, likely to visit
again

GLOBAL & SCALABLE



1.2B+ rich profiles
14B searches
annually
750M monthly
unique users

ADARA Has The Most Complete Traveler Profile

SEARCH

- Trip dates
- Origin and destination
- Avg. Daily Rate
- Avg. Airfare
- N. of Travelers
- Hotel Brand & Property
- Provider
- Alternate destinations
- Class of service

BOOKING

- Trip dates
- Origin and destination
- Avg. Daily Rate
- Avg. Airfare
- N. of Travelers
- N. of Adults & Children
- Hotel Brand & Property
- Booking Provider
- Booked Class
- Purchase Timeline

LOYALTY

- Loyalty membership
- Membership level
- Points balance
- Co-brand credit card holder

IDENTITY

- Demographics
- Cookies
- Device IDs
- Email address

OTHER

- Car Rental
- Railway
- Cruise
- Ground Transportation
- Events and activities
- Payment type
- Ancillary purchase
- Language
- Currency

2019 DIGITAL TRENDS

Artificial Intelligence (ADI - Adobe Digital Insights) reports 60% of all leisure travel is booked on-line – machine learnings to save cost, accelerate growth and increase efficiencies

NETFLIX uses this to anticipate Movies and Shows you MIGHT ALSO LIKE

DISNEY uses AI with Magic Bracelets
collecting data for
business intelligence



US Crime TV Shows



Because you watched Christmas Wedding Planner



How is this relevant to me?

BIG DATA AND AI is c

ADARA is working with
Dominica – where the
how to find more of


We need your partico
profile.

No fees involved.



Data at Scale – Top 10



-  Facebook 1.59 billion
-  WhatsApp 1 billion
-  QQ (China) 853 million
-  WeChat (China) 697 million
-  Qzone (China) 640 million
-  Tumblr 550 million
-  Instagram 400 million
-  Twitter 320 million
-  Google+ 300 million
-  Baidu (China) 300 million

2019 DIGITAL TRENDS

Artificial Intelligence (ADI - Adobe Digital Insights) reports 60% of all leisure travel is booked on-line – machine learnings to save cost, accelerate growth and increase efficiencies

ChatBots – gaining an edge on your competitor



Booking.com has grown from a small Dutch start-up to one of the largest travel e-commerce companies in the world. **With the goal of empowering people to experience the world, Booking highly invests in digital technology that helps take the friction out of travel and that's why they decided to build a chatbot.**

The World of Travel Technology

Robot Concierge Services

Voice Recognition Services

Keyless room check in and entry

Digital Tour Guides

Tracking flights, luggage, traffic, transportation – the smart phone has become our travel agent, tour guide, best restaurant locator - we don't chat, we TWEET. We don't note, we PIN. We don't report, we POST. We don't cab, we UBER. We don't read articles, we read BLOGS. We don't watch movies we watch NETFLIX. FRIEND is a noun AND a verb. GOOGLE was added to the Oxford dictionary in 2006 – and just celebrated its 20th birthday.

What does this mean to you?

- DATA and TECHNOLOGY can seamlessly help you sift through the clutter
- Eliminate the guess work
- GONE are the days of SPRAY and PRAY

2019 DIGITAL TRENDS

Artificial Intelligence (ADI - Adobe Digital Insights) reports 60% of all leisure travel is booked on-line – machine learnings to save cost, accelerate growth and increase efficiencies

ChatBots – gaining an edge on your competitor

Personalization – content, products and communication – getting the right message to the right person at the right time

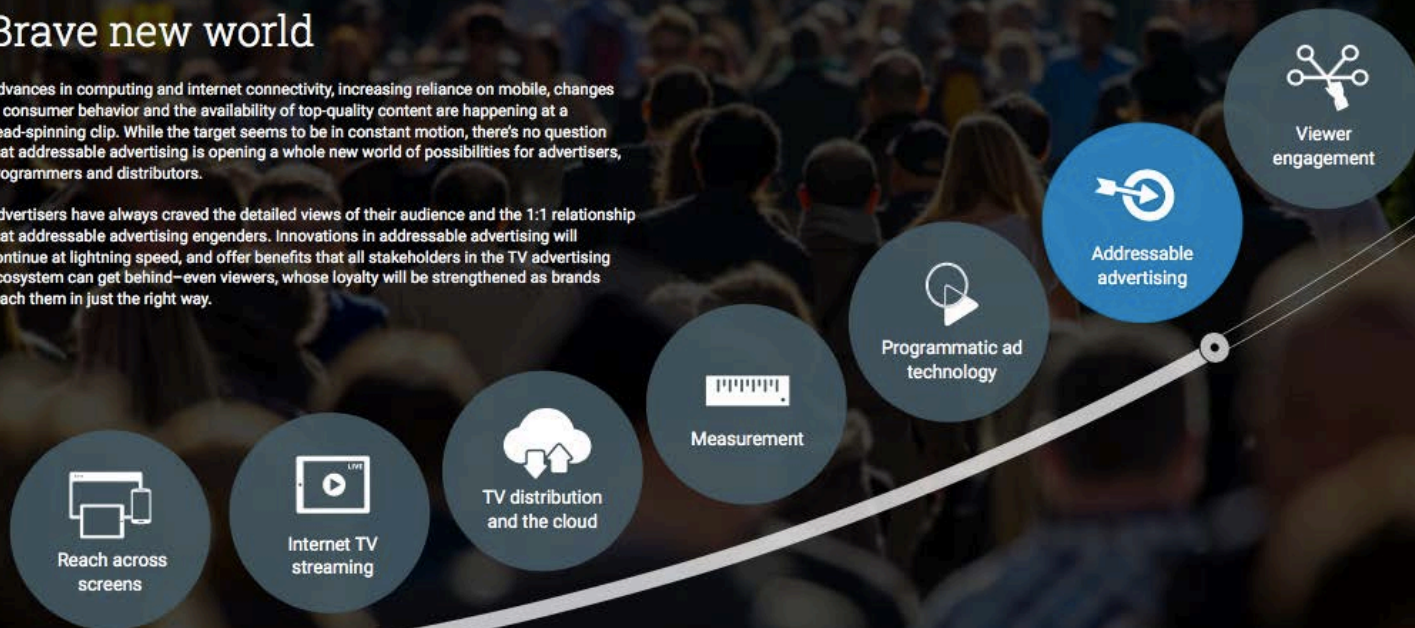
AMAZON has been a pioneer of this

Addressable TV*

Brave new world

Advances in computing and internet connectivity, increasing reliance on mobile, changes in consumer behavior and the availability of top-quality content are happening at a head-spinning clip. While the target seems to be in constant motion, there's no question that addressable advertising is opening a whole new world of possibilities for advertisers, programmers and distributors.

Advertisers have always craved the detailed views of their audience and the 1:1 relationship that addressable advertising engenders. Innovations in addressable advertising will continue at lightning speed, and offer benefits that all stakeholders in the TV advertising ecosystem can get behind—even viewers, whose loyalty will be strengthened as brands reach them in just the right way.



How Do Internet Users Worldwide Feel About Companies Using Data/Personalization? April 2018

% of respondents, by age

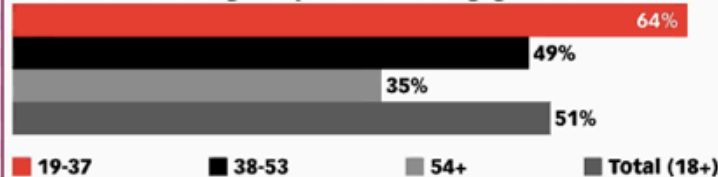
I understand how companies use my data



I expect offers from companies to always be personalized



I'm comfortable with companies applying relevant information about me in exchange for personalized engagement



Source: Salesforce, "Trends in Customer Trust," Sep 6, 2018

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www.eMarketer.com

Not only are consumers comfortable with personalization, they are increasingly expecting it.



2019 DIGITAL TRENDS

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ChatBots – gaining an edge on your competitor

Personalization – content, products and communication

Video Marketing – viral appeal, builds confidence, drives higher conversions

<https://trendyminds.com/blog/5-killer-tourism-marketing-campaigns-that-make-us-want-to-travel>

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ChatBots – gaining an edge on your competitor

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Video Marketing – viral appeal, builds confidence, drives higher conversions

Influencer Marketing - indications are that there is a shift from celebrity to “real people” social campaigns – more relatable – and what is NEW is the ability to **measure** the affects of Influencers

Why is Social, Review and Influencer Coverage Important?

Key Statistics *

- ✿ 86% of consumers read reviews for local businesses (including 95% of people aged 18-34)
- ✿ Consumers read an average of 10 online reviews before feeling able to trust a local business
- ✿ 40% of consumers only take into account reviews written within the past 2 weeks – up from 18% last year
- ✿ 57% of consumers will only use a business if it has 4 or more stars
- ✿ 80% of 18-34 year olds have written online reviews – compared to just 41% of consumers over 55
- ✿ 91% of 18-34 year old consumers trust online reviews as much as personal recommendations
- ✿ 89% of consumers read businesses' responses to reviews

* Source BRIGHTLOCAL DECEMBER 2018

1. The Bucket List Family

Influencers come in many shapes and sizes. The **bucketlistfamily** is a prime example of this. The **family of 5** sold everything they owned and traded everything they knew for a travel packed life. What started out as a 6-month family adventure soon turned into a lifestyle.

dusty. It's crazy sensation.

n-girlfriend pulling inspired the

: NYC, currently in: Curaçao
nt • inquiries:

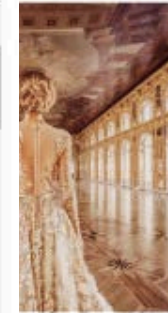
6. Kiers

Like some c
world. To dc
2011. In jus
showstoppi



Damon a

Damon an
subscriber



g. Now one of the top
photography while still
France and the Four

Today The Bucket List Family now has more than 1 million followers on Instagram and more than **300,000 subscribers on YouTube**. Their content is not only highly visual but very personal, which makes them a great family-friendly option for travel brands on the lookout for influencers.

que backdrops

What Are Your Driving Metrics For Success?

WE NOW HAVE TOOLS TO MEASURE



Less

Flights
Air Tickets



Branding

Top-of-mind recognition



Caribbean Travel Trends

ADARA's Range of Scale to the Caribbean – Sample island: ARUBA

94,050

Total Number of Bookings

7,950,666

Total Number of Searches

Overview - Hotel

	Total Bookings	Total Searches	Avg. LOS	Avg. # of Travelers	Avg. Search to Booking Window	Avg. AP	Avg. ADR	Total Estimated Travelers	Total Estimated Nights	
1		94,050	7,950,666	4.7	2.0	17.9	90.3	\$501.42	192,729	437,973

Top 15 Origins - Hotel

Origin	Bookings	Searches	Avg. LOS	Avg. # of Travelers	Avg. Search to Booking Window	Avg. AP	Avg. ADR	Total Estimated Travelers	Total Estimated Nights
1 Mountain View, CA, US	11,740	53,884	3.5	2.0		22.9	\$596.16	23,484	41,102
2 Oranjestad, AW	3,956	245,926	4.4	1.9	20.3	60.7	\$503.52	7,622	17,574
3 New York, NY, US	3,525	221,036	4.7	2.0	15.8	99.9	\$523.32	6,971	16,392
4 Greenville, SC, US	1,606	9,897	3.3	2.0		23.8	\$465.67	3,209	5,225
5 Brooklyn, NY, US	1,253	124,017	4.8	2.0	3.1	103.7	\$522.38	2,563	6,015
6 Atlanta, GA, US	1,108	92,900	4.1	1.8	1.7	86.6	\$376.51	1,986	4,542
7 Chicago, IL, US	1,029	94,603	4.4	1.9	3.6	122.5	\$414.62	1,909	4,537
8 Miami, FL, US	798	56,418	3.9	1.9	16.8	71.5	\$448.83	1,495	3,122
9 Boston, MA, US	748	65,921	4.6	2.0	3.0	97.9	\$470.97	1,469	3,437
10 Washington, DC, US	716	64,836	4.6	2.0	27.0	105.0	\$433.53	1,404	3,286
11 Orlando, FL, US	610	40,166	4.4	1.9	43.0	111.2	\$335.67	1,185	2,701
12 Newark, NJ, US	519	62,529	5.0	2.2	1.0	89.3	\$471.27	1,125	2,606
13 Philadelphia, PA, US	502	53,685	4.7	1.9	16.5	98.2	\$484.35	975	2,377
14 Houston, TX, US	494	42,867	4.2	1.9	0.0	96.2	\$436.48	940	2,084
15 Charlotte, NC, US	491	40,867	4.6	2.0	0.8	100.7	\$499.41	984	2,247

New Technology and Generations*

BOOMERS

Baby Boomers

Years Born: 1944 - 1964

Current ages: 54 - 74

Size: 76 Million

Media Consumption: Highest consumers of traditional media like T.V., magazines and radio. 90% have Facebook

Banking Habits: Prefer going in branch to do transactions, but don't reject digital or mobile.

Shaping Events: Post WW2 optimism, Vietnam war, and the launch of the environmental movement.

What's on the financial horizon: Largest growing demographic for student loan debt. Balancing children's success with retirement goals

- > **Baby Boomers:** Baby boomers were born between 1944 and 1964. They're current between 54-74 years old (76 million in U.S.)
- > **Gen X:** Gen X was born between 1965 - 1979 and are currently between 39-53 years old (82 million people in U.S.)
- > **Gen Y:** Gen Y, or Millennials, were born between 1980 and 1994. They are currently between 24-38 years old.
 - > Gen Y.1 = 24-28 years old (31 million people in U.S.)
 - > Gen Y.2 = 28-38 (42 million peeps)
- > **Gen Z:** Gen Z is the newest generation to be named and were born between 1995 and 2015. They are currently between 3-23 years old (nearly 74 million in U.S.)

GEN X

Years Born: 1965 to 1979

Current Ages: 39 to 53

Other Nicknames: "Latchkey" generation, MTV generation

Generation Size: 82 Million

Media Consumption: Gen X still reads newspapers, magazines, listens to the radio, and watches TV – about 165 hours worth of TV a month. However, they are also digitally savvy and spend roughly 7 hours a week on Facebook.

Banking Habits: Since they are digitally savvy, Gen X will do some research and financial management online, but still prefer to do transactions in person. Believe banking is a person-to-person business and exhibit brand loyalty.

Shaping Events: End of the cold war, the rise of personal computing, and feeling lost between the two huge generations.

What's next on their financial horizon: Gen X is trying to raise a family, pay off student debt, and take care of aging parents. These demands put a high strain on their resources. The average Gen Xer carries \$142,000 in debt. They are looking to reduce their debt while building a stable saving plan for the future.

Gen X

Years Born: 1965 - 1979

Current ages: 39 - 53

Size: 82 Million

Media Consumption: Watch an average of 165 hours of television a month. Heavy Facebook users, 7 hours a week. Blogs are their favorite form of content.

Banking Habits: Looking for good rates to manage debt. Brand loyal and believe that banking is a person-to-person relationship.

Shaping Events: End of the Cold War, rise of the personal computing, feeling lost between two large generations.

What's on the financial horizon: Carry the highest load of debt - \$142k on average.

GEN Y - MILLENNIALS

Years Born: 1980 to 1994

Current Ages: 24 to 38

Other Nicknames: Gen Y, Gen Me, Gen We, Echo Boomers

Generation Size: 95 Million

Media Consumption: 95% still watch TV, but Netflix edges out traditional cable as the provider. Cord-cutting in favor of streaming services is the popular choice. This generation is extremely comfortable with mobile devices but 32% will still use a computer for purchases. They typically have multiple social media accounts.

Banking Habits: Millennials have less brand loyalty than previous generations. They prefer to shop product and features first and have little patience for inefficient or poor service. Because of this, Millennials place their trust in brands with superior product history such as Apple and Google. They seek digital tools to help manage their debt and see their banks as transactional as opposed to relational.

Shaping Events: The Great Recession, the technological explosion of the internet and social media, and 9/11

What's next on their financial horizon: Millennials are entering the workforce with high amounts of student debt. This is delaying major purchases like weddings and homes. Because of this financial instability, Millennials prefer access over ownership which can be seen through their preference for on-demand services. They want partners that will help guide them to their big purchases.

Millennials

Years Born: 1980 - 1994

Current ages: 24 - 38

Size: 95 Million

Media Consumption: 94% still watch TV, but increasingly cutting the cord for streaming options. Mobile is big, but 32% still use computers for purchases.

Banking Habits: Shop products first. Want digital tools to make managing debt frictionless. 41% have downloaded a mobile money management app.

Shaping Events: Great Recession, explosion of internet and social media, and 9/11

What's on the financial horizon: Conquering staggering student debt and beginning to save for weddings and homes.

GEN Y WILL EARN 46% OF INCOME IN THE US BY 2025

GEN Z

Years Born: 1995 to 2015

Current Ages: 3 to 23

Other Nicknames: iGeneration, Post-millennials, Homeland Generation

Generation Size: Roughly 25% of the population

Media Consumption: The average Gen Zer received their first mobile phone at age 10.3 years. Many of them grew up playing with their parents' mobile phones or tablets. They have grown up in a hyper-connected world, and the smartphone is their preferred method of communication. On average, they spend at least 3 hours a day on their mobile device.

Banking Habits: This generation has seen the struggle of Millennials and has adopted a more fiscally conservative approach. They want to avoid debt and appreciate accounts or services that aid in that endeavor. Debit cards top their priority list followed by mobile banking. Over 50% have not entered a bank branch in at least 3 months.

Shaping Events: Smartphones, social media, never knowing a country not at war, and seeing the financial struggles of their parents (Gen X).

What's next on their financial horizon: Learning about personal finance. They have a strong appetite for financial education and are opening savings accounts at younger ages than prior generations.

Gen Z

Years Born: 1995 - 2015

Current ages: 3 - 23

Size: 25% of the population. The largest generation ever

Media Consumption: 41% spend at least 3 hours a day online. Mostly via mobile

Banking Habits: Mobile first (or only).

Shaping Events: Having Gen X as parents, born to country never not at war, and Financial Crisis of 2008, Internet availability at a young age.

What's on the financial horizon: Learning about personal finances and avoidance of debt.

Questions?

Vivian Teddi Mur

vivian.mur@adara.com

1-305-495-6296

