



Return to the Skies: Emerging Airline Search and Booking Patterns for 2020 & 2021

Thursday, June 25, 2020 2:00-3:15pm et
#CHTALive



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ASSOCIATION

Participants

Olivier Ponti,

Vice President – Insights,
ForwardKeys



Hon. Dionisio D'Aguilar,
Minister of Tourism and Aviation,
Commonwealth of The Bahamas



Simon Suarez,

Vice President Institutional Relations
and Projects,
Grupo Puntacana



Vincent Vanderpool-Wallace,

Principal Partner,
BedfordBakerGroup



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CHTA COVID-19 Resource Center

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Caribbean Travel Advisories

US
PASS
PASS

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Jamaica
Bahamas
Haiti
Saint Lucia
Barbados
Saint Vincent and the Grenadines
Trinidad and Tobago
Curaçao
Belize
Cuba
Jamaica
Bahamas
Haiti
Saint Lucia
Barbados
Saint Vincent and the Grenadines
Trinidad and Tobago
Curaçao
Belize

www.caribbeanhotelandtourism.com/covid19/



Caribbean Hotel & Tourism Association

Published by Greta Andzenge [?] · 19 hrs ·

#InCaseYouMissedIt Our first session of #CaribbeanTourismFireworks featuring Puerto Rico, with representatives from Discover Puerto Rico and Puerto Rico Hotel & Tourism Association. Tune in on Monday, June 29 when we will hear from the U.S. Virgin Islands.



1,620 Views

Caribbean Hotel & Tourism Association was live.

Published by Vanessa Ledesma [?] · Yesterday at 9:01 AM ·



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Next Week:

Guest Assurance and Insurance:
Trip Mate Travel Protection Plan
Thursday, July 2, 2PM ET



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industry professionals!**

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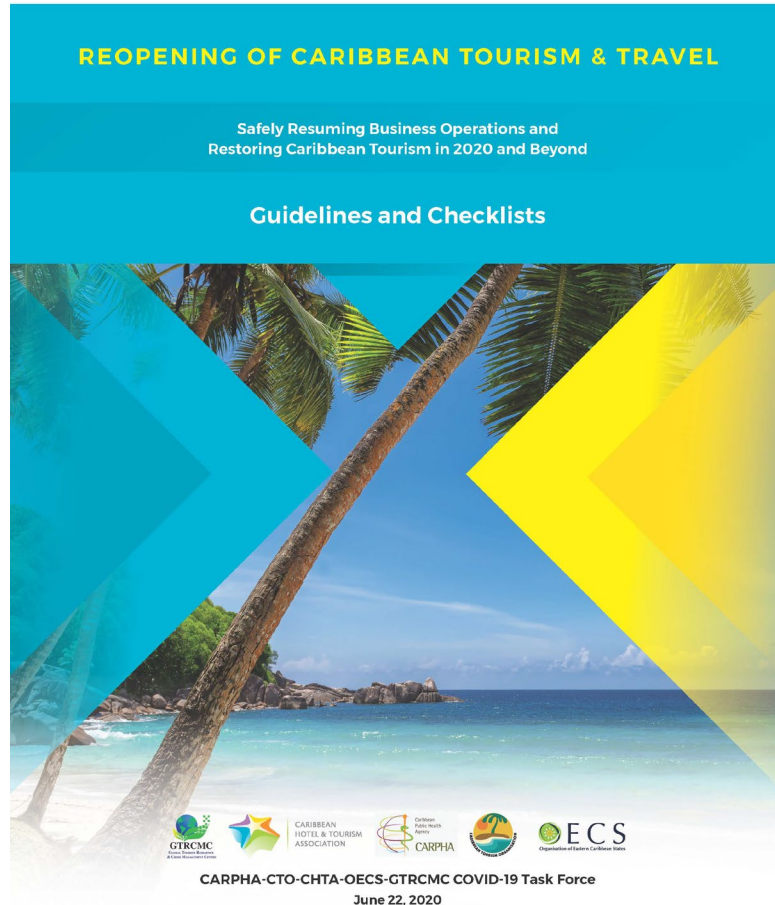
Twitter: @CHTAFeeds

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Tourism Association

Guidelines & Checklists for Reopening of Caribbean Tourism and Travel

Caribbean Tourism Health Safety Training Series



CARIBBEAN TOURISM HEALTH SAFETY TRAINING SERIES

June 23 - July 22, 2020
(Open to members and non-members)

Week of June 22

Tuesday, June 23
10AM ET
Topic: Tourism Health Safety 101 and THIS Overview
Who: Public Sector - Ministries of Tourism, Tourism Boards, DMOs, Directors and Support Teams
Facilitator: CARPHA & CTO

Wednesday, June 24
3PM ET
Topic: Tourism Health Safety 101 and THIS Overview
Who: All Private Sector Tourism-Related Businesses: Owners, Managers, Supervisors, Directors
Facilitator: CARPHA & CHTA

Week of June 29

Tuesday, June 30
10AM & 2PM ET
Topic: Ground Transportation
Who: Taxi, Tour Operators, Transport & Tourism Boards/DMOs
Facilitator: CTO & Global Ports

Wednesday, July 1
11AM ET (English)
3PM ET (Espanol)
Topic: Accommodations - Public Areas (Reception - Arrival & Departure Areas - Restrooms, Hard Surfaces, Food Service Public Area) and THIS
Who: Accommodation providers (Hotels, Villa): Owners, Managers, Supervisors, Directors
Facilitator: Ecolab & CHTA

Blue: Private Sector
Orange: Public Sector
Black: Applies to Both

CARIBBEAN TOURISM HEALTH SAFETY TRAINING SERIES

June 23 - July 22, 2020
(Open to members and non-members)

Week of July 6

Tuesday, July 7
10AM & 2PM ET
Topic: Recreation & Entertainment: Sites & Attractions
Who: Attractions & Tour Operators
Facilitator: CTO

Wednesday, July 8
11AM ET (English)
3PM ET (Espanol)
Topic: Food & Beverage Service (Excluding Food Prep)
Who: F&B Outlets, Restaurants, Accommodations with F&B Offerings: Owners, Managers, Supervisors, Directors
Facilitator: Ecolab & CHTA

Week of July 13

Monday, July 13
11AM ET (English)
3PM ET (Espanol)
Topic: Accommodations & Attractions - Pools, Beach & Spa
Who: Attractions & Accommodation Providers: Owners, Managers, Supervisors, Directors & Maintenance Department Representatives
Facilitator: Ecolab & CHTA

Wednesday, July 15
11AM ET (English)
3PM ET (Espanol)
Topic: Accommodations - Housekeeping
Who: Accommodation Providers: Owners, Managers, Supervisors, Directors & Housekeeping Department Representatives
Facilitator: Ecolab & CHTA

Week of July 20

Wednesday, July 22
11AM ET (English)
3PM ET (Espanol)
Topic: Accommodations - Laundry
Who: Accommodation Providers: Owners, Managers, Supervisors, Directors & Housekeeping Department Representatives
Facilitator: Ecolab & CHTA

Blue: Private Sector
Orange: Public Sector
Black: Applies to Both

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Principal Partner,
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Return to the Skies

Emerging Airline Search and Booking Patterns for 2020 & 2021

Olivier Ponti – VP Insights
ForwardKeys

25 June, 2020



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ForwardKeys has data that captures and reflects the entire traveller journey



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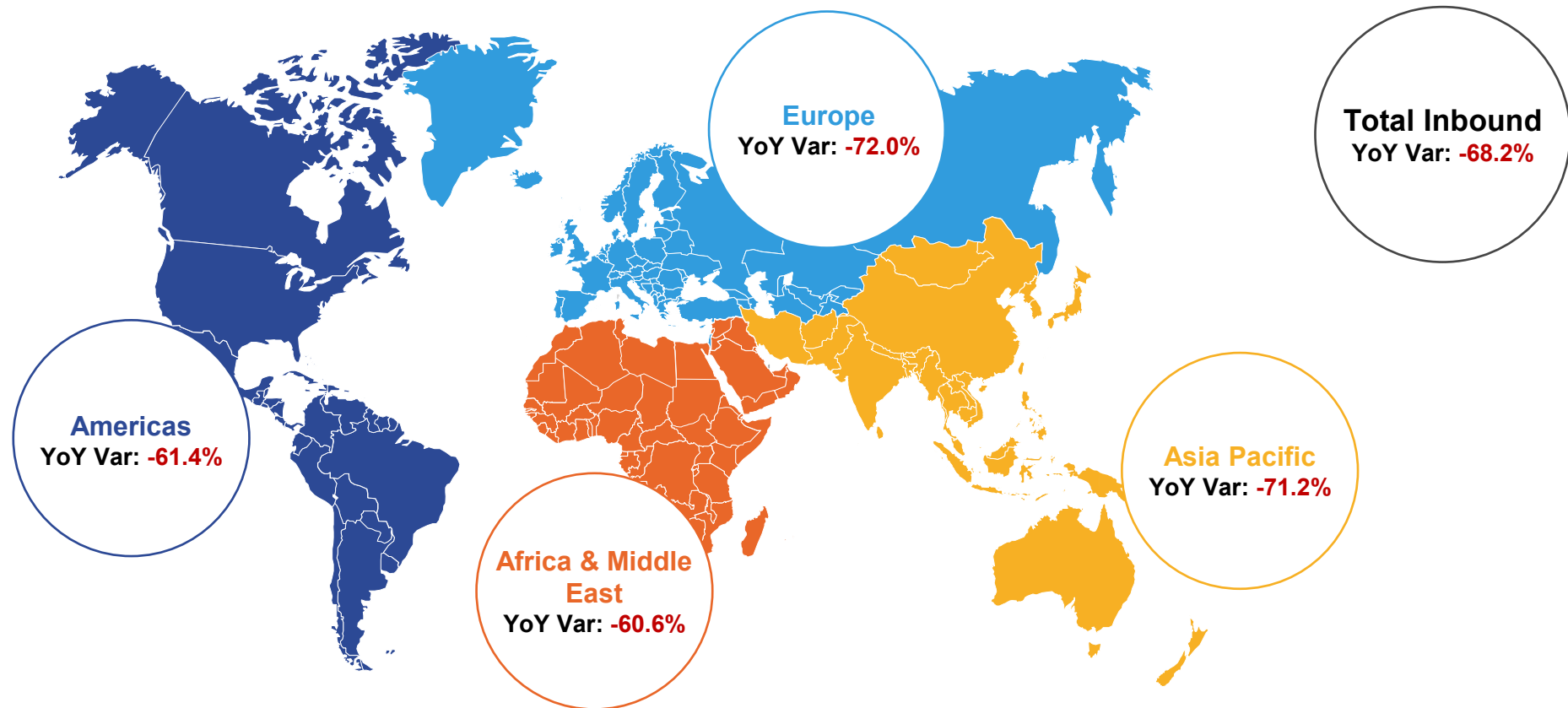
Delayed impact on The Americas



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Year to date arrivals to world regions *
1 January to 21 June 2020; Year-on-Year variations by region



* excluding domestic



Arrivals from 01 January to 21 June 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

Widespread declines across Caribbean destinations



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Year to date arrivals to Caribbean*
1 January to 21 June 2020; Year-on-Year variations by region



Arrivals from 01 January to 21 June 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.

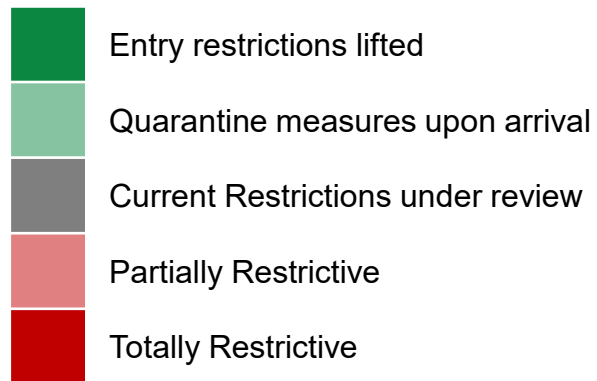


Source: ForwardKeys Air Reservation Data.

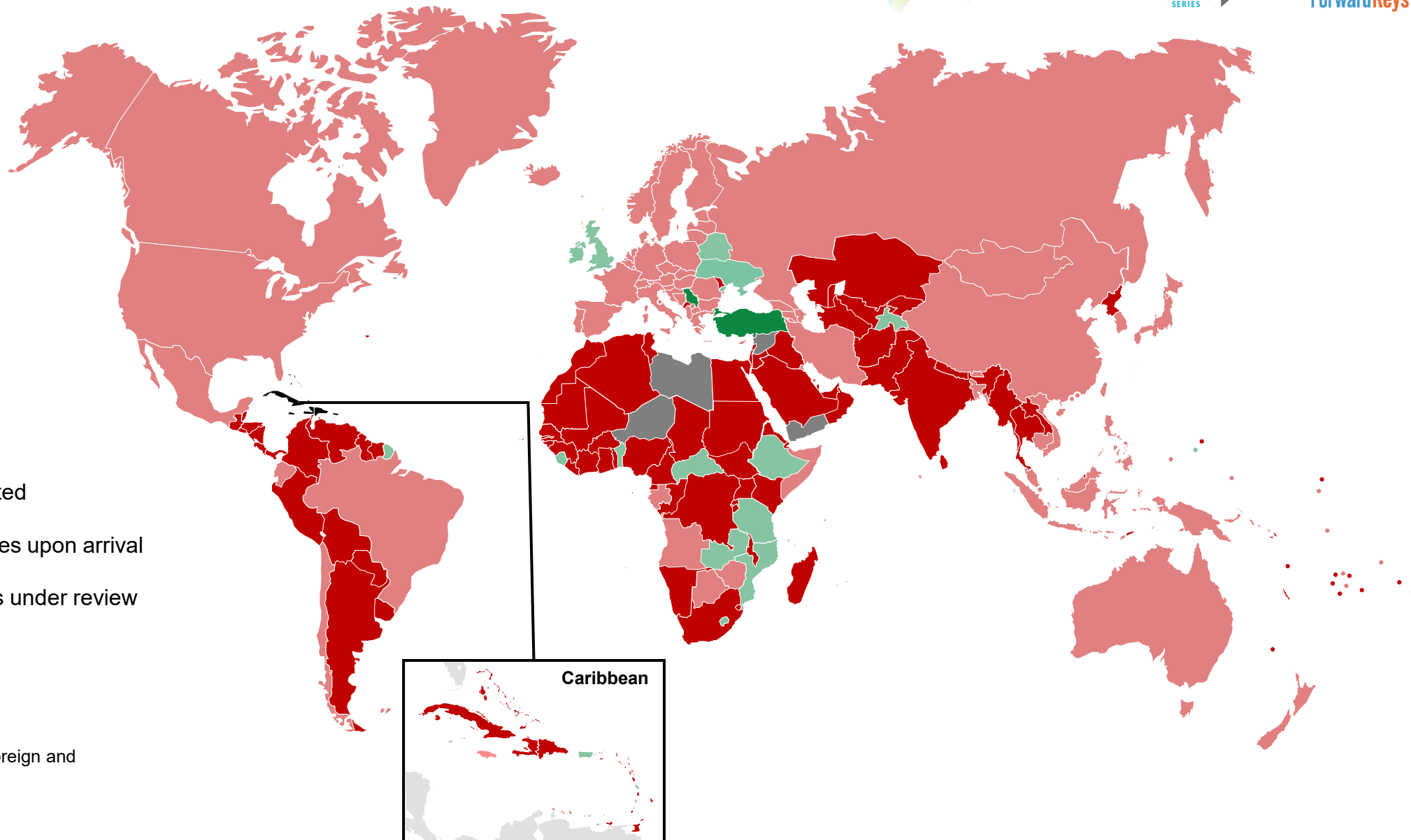
The current state of travel restrictions Worldwide



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Source: IATA Timatic & British Foreign and Commonwealth Office.
Data as per 23 June 2020.



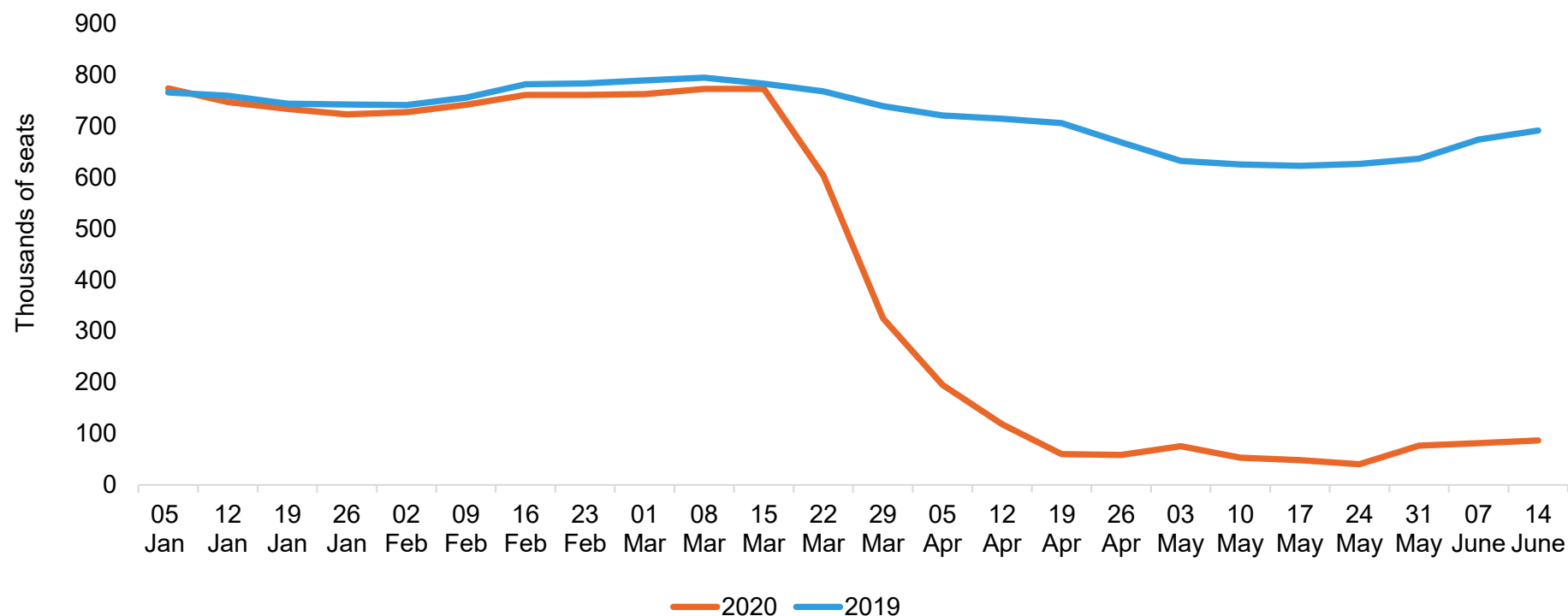
Dramatic decline in seat capacity to the Caribbean



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Seat Capacity evolution for Caribbean travel from January 2020 Year-to-Date vs the same period in 2019



The air capacity seats are reported as per the data parameters listed above. They may differ due to the quick changing developments within the aviation sector, including unreported or unfilled seat numbers by airline operators.



Air Capacity for flight dates between 01 Jan – 20 June 2020 vs same period in 2019, for Worldwide travel*, as of 16 June 2020. *(Excluding domestic)



Source: ForwardKeys &



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Early signs of recovery



The current issued tickets show an uptick since late May

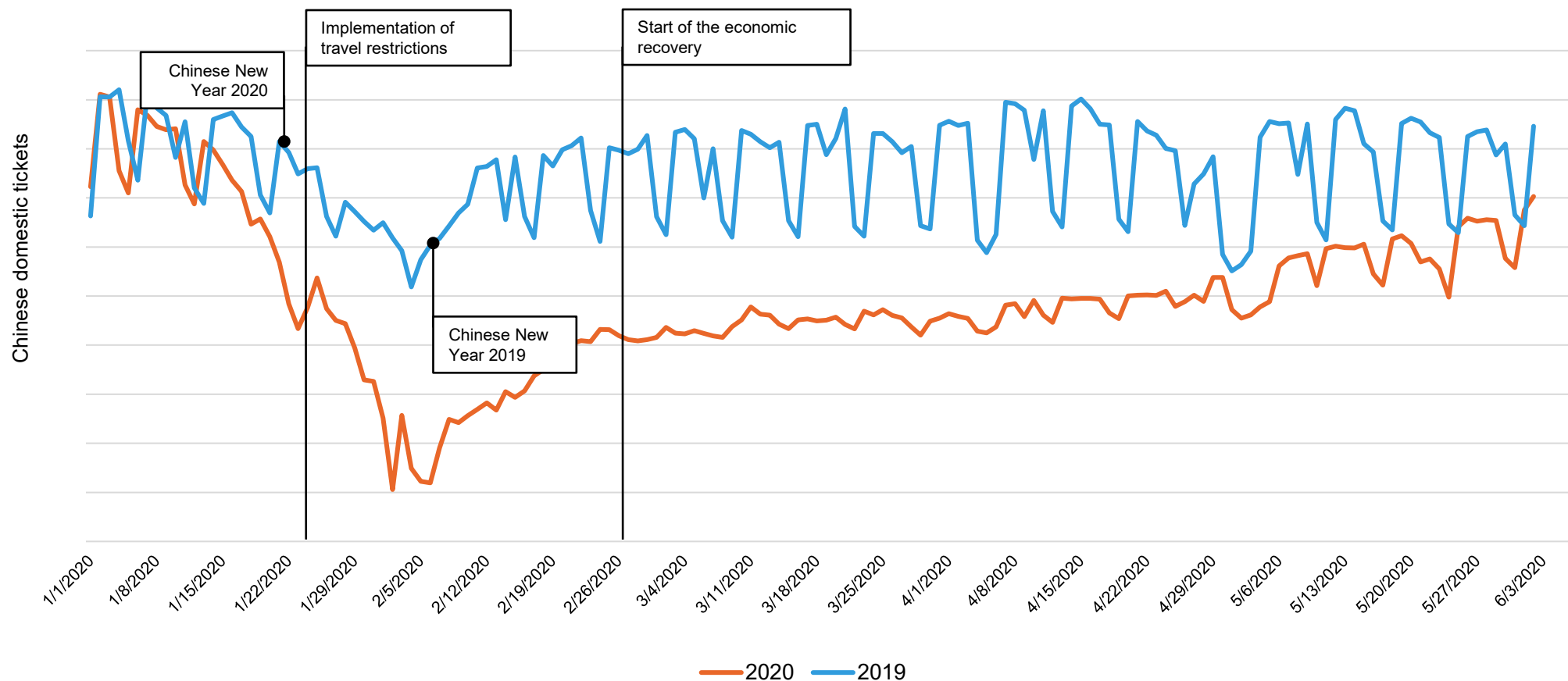


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China domestic air travel ticketing trend

1 January to 7 June 2020 vs 1 January to 8 June 2019



Ticketing dates from 1 January to 7 June 2020 vs. same period in 2019.



Only considered pax staying more than 1 night at destinations.



Source: ForwardKeys Air Ticket data.

Europe is starting to rebound

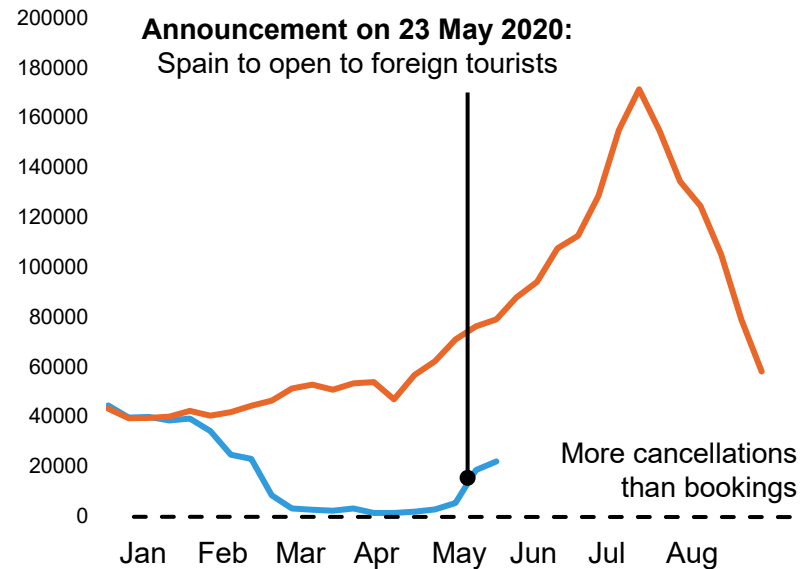


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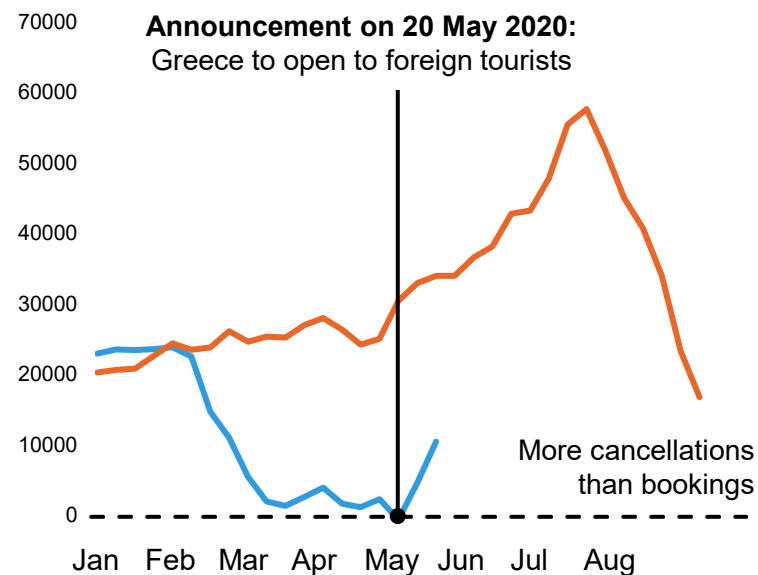


Tickets issued for international flights* to Spain, Greece and Portugal for travel in July and August 2020

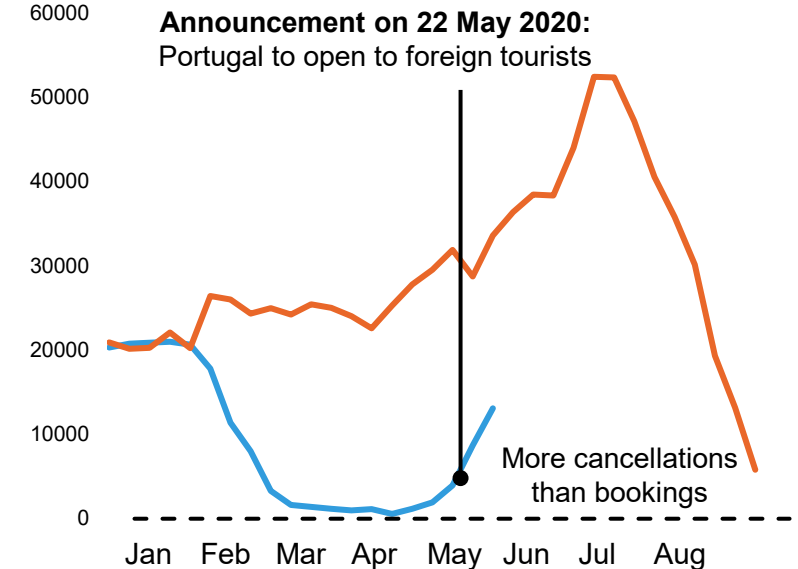
Spain



Greece



Portugal



— 2020 — 2019

***Excluding Domestic**

Tickets issued from 07 July 2019 to 03 Jun 2020 vs same period last year, for travel in July –August 2020 vs travel in July – August 2019.

Only considered pax staying at least 1 night at destination.

Source: ForwardKeys Air Ticket Data.

New bookings to the Caribbean overtake cancellations for the first time since March

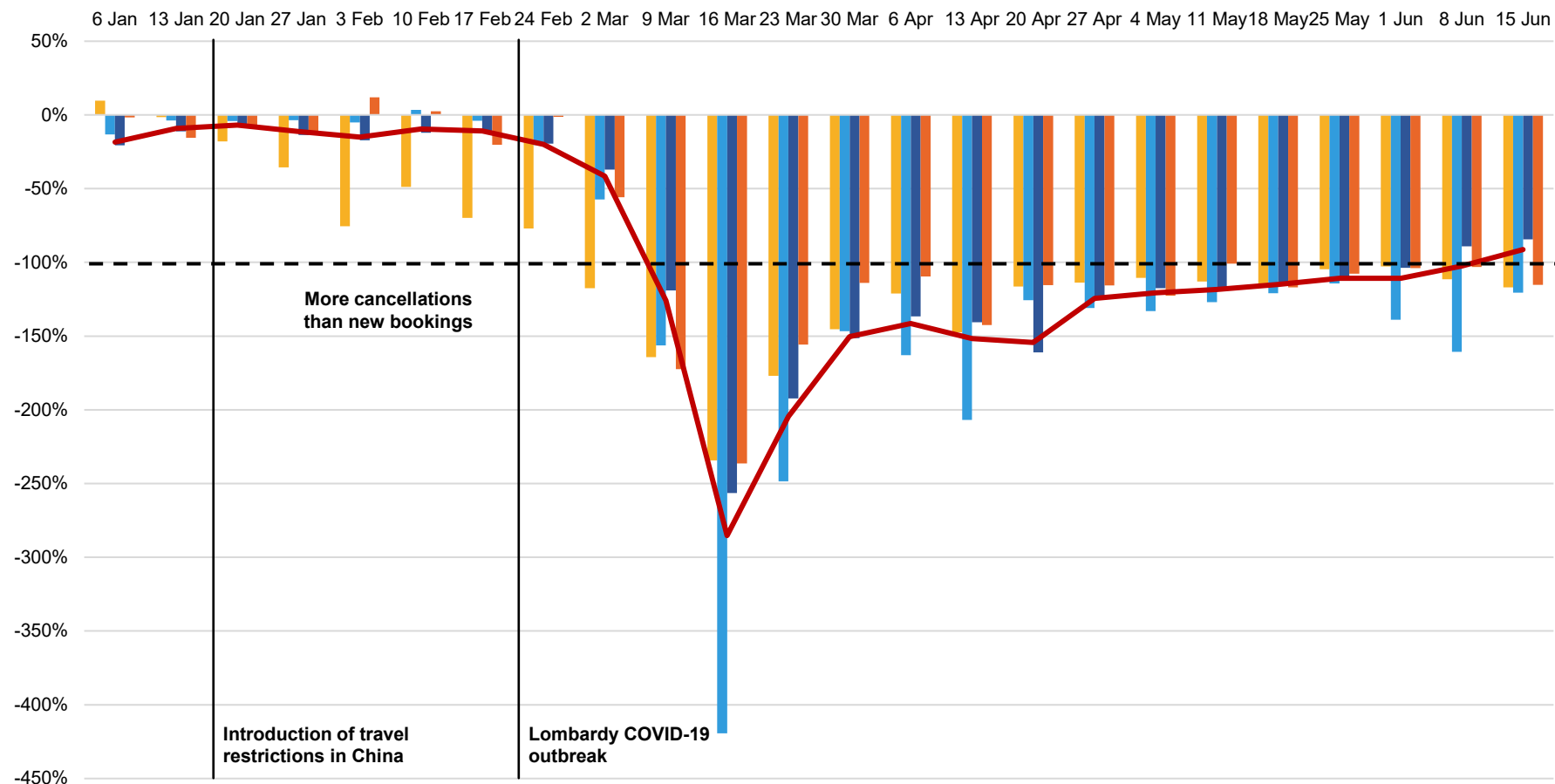


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Bookings made for International travel to Caribbean by departure region

06 January to 07 June, Year-on-Year variations



Bookings made Year to date*

YoY % change

Asia Pacific	-97.4%
Europe	-93.7%
Americas	-85.2%
Africa & Middle East	-84.5%
Total Global	-87.0%

*Bookings made from 6 January to 21 June



Bookings made from 6 January to 21 June 2020 vs same period in 2019 for future travel at any time.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

New weekly tickets to Caribbean key destinations start to recover

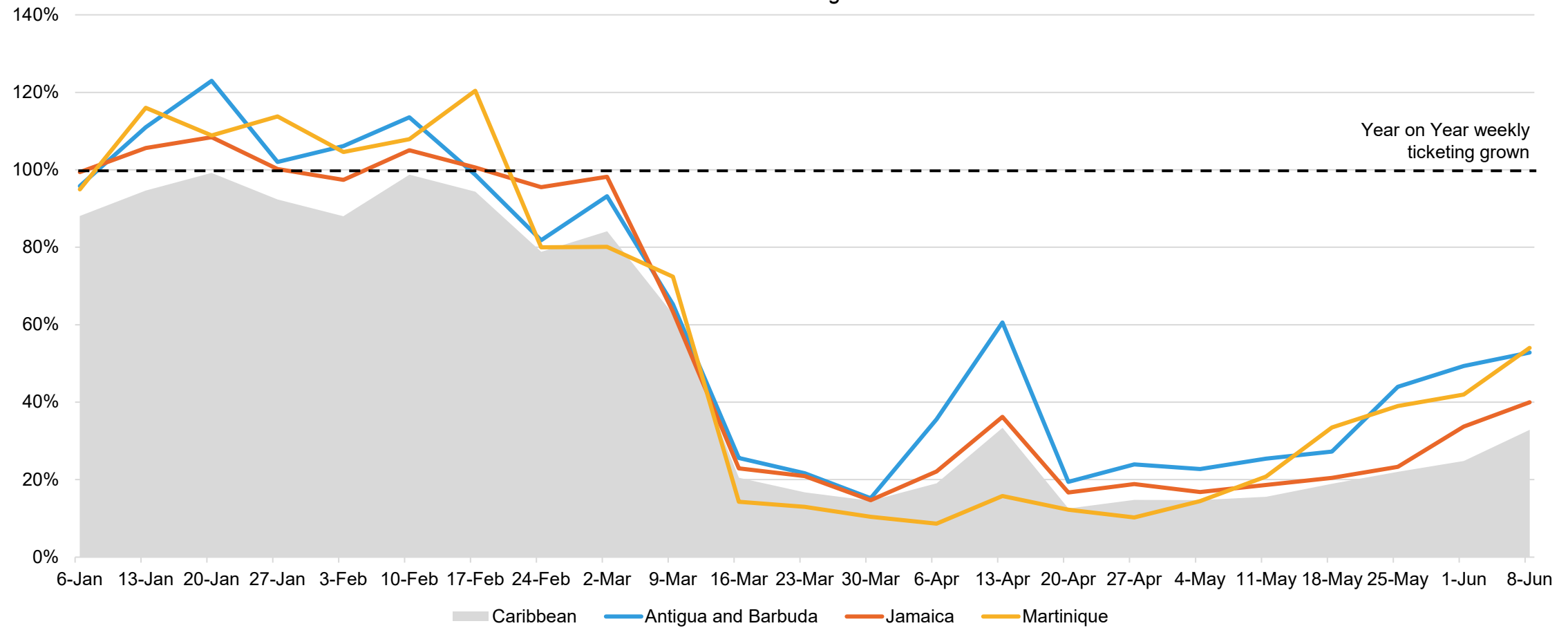


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Weekly tickets made for future travel to Antigua & Barbuda, Jamaica and Martinique

2020 vs 2019 booking volumes



Tickets issued from 6 Jan to 14 June 2020 for future travel dates for any future travel vs same period in 2019



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Ticket data.

Travel distribution for tickets issued in first 2 weeks of June

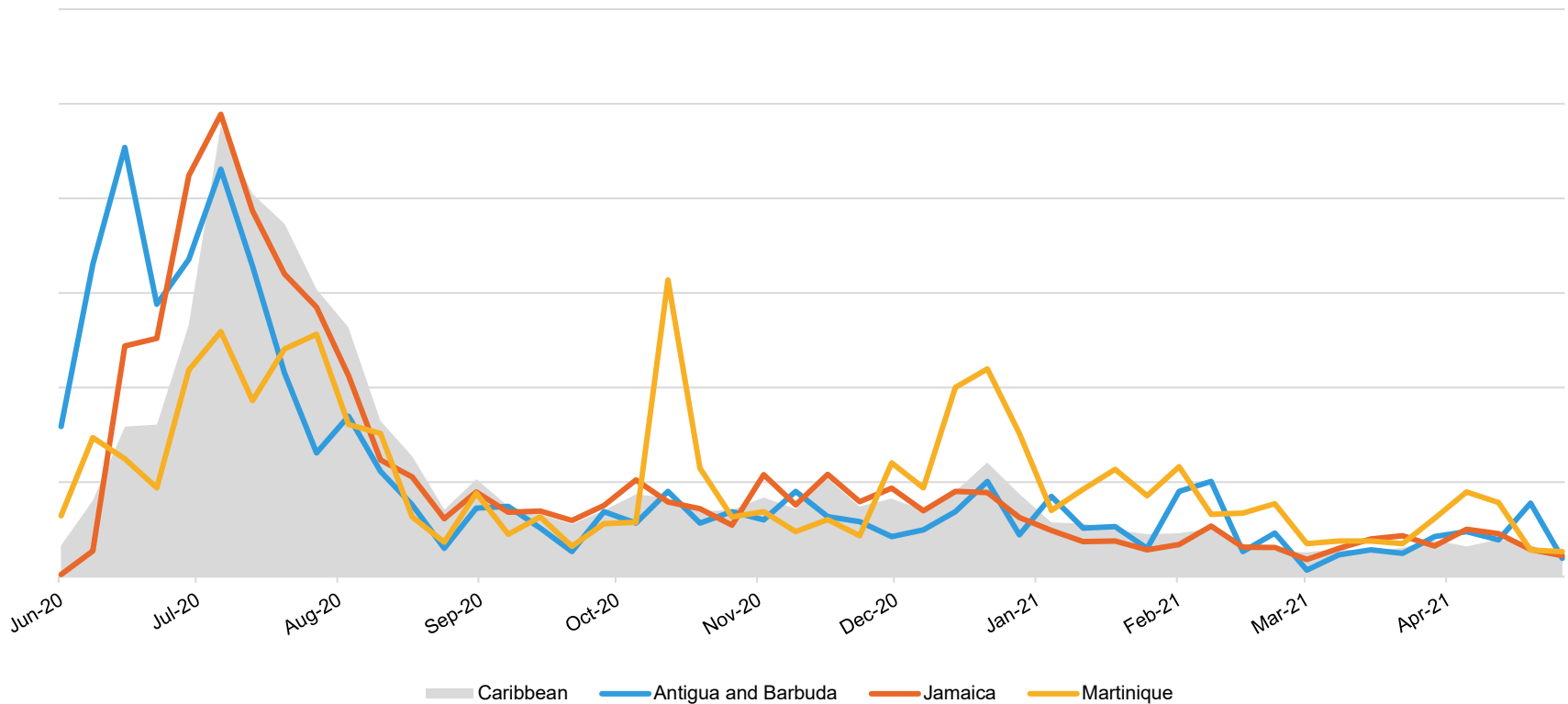


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Weekly ticket distribution made for future travel to Antigua & Barbuda, Jamaica and Martinique

2020 vs 2019 booking volumes



Tickets issued from 01 Jun to 14 June 2020 for future travel dates for any future travel vs same period in 2019



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Ticket data.

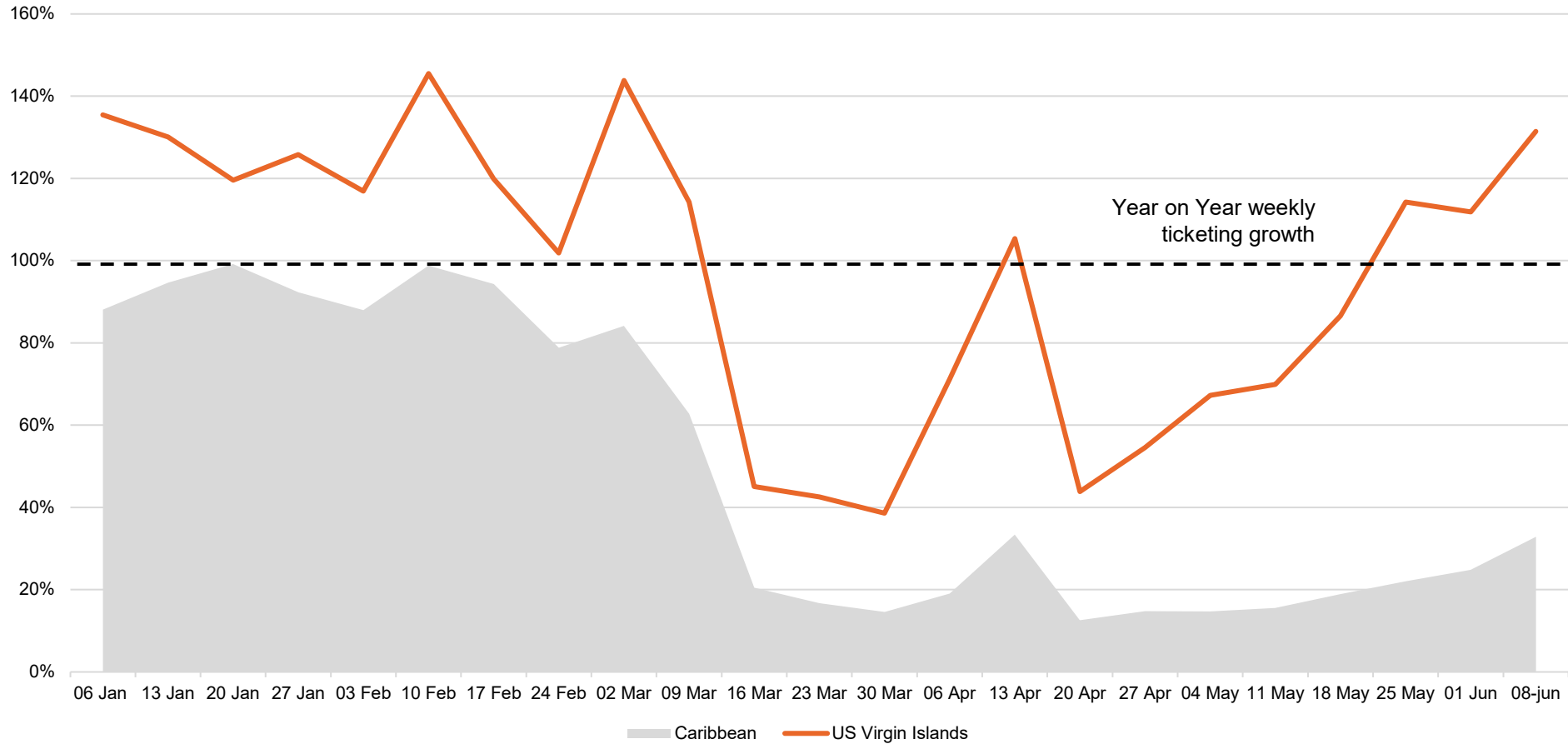
New weekly tickets to US Virgin Islands from U.S.A show strong YoY growth



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Weekly tickets made for future travel to Caribbean and US Virgin Islands from U.S.A
2020 vs 2019 booking volumes



Tickets issued from 6 Jan to 14 June 2020 for future travel dates for any future travel vs same period in 2019



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Ticket data.

New weekly tickets for Intra-Caribbean travel start to recover...

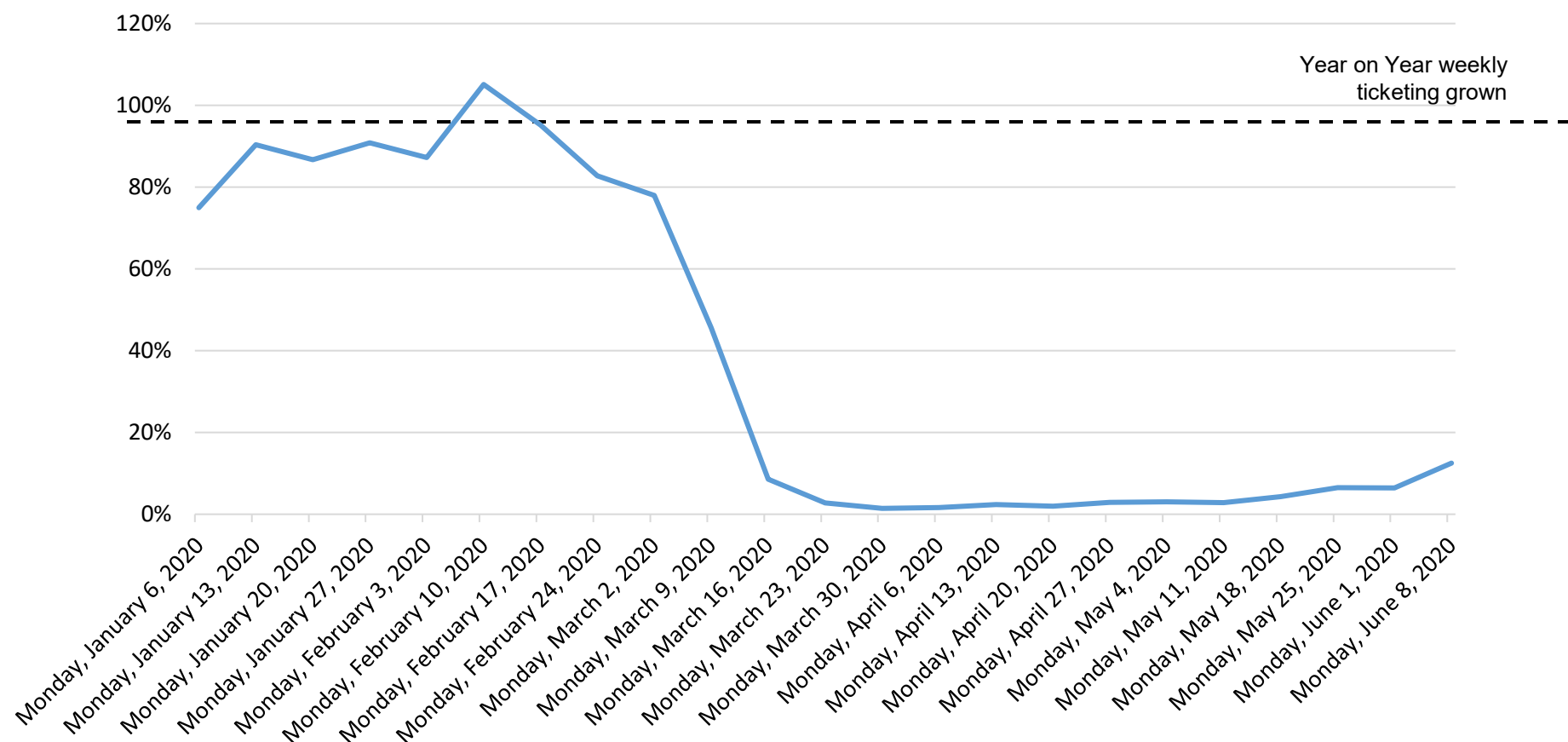


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Weekly tickets made for Intra-Caribbean travel

2020 vs 2019 booking volumes



Tickets issued from 6 Jan to 14 June 2020 for future travel dates for any future travel vs same period in 2019



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Ticket data.

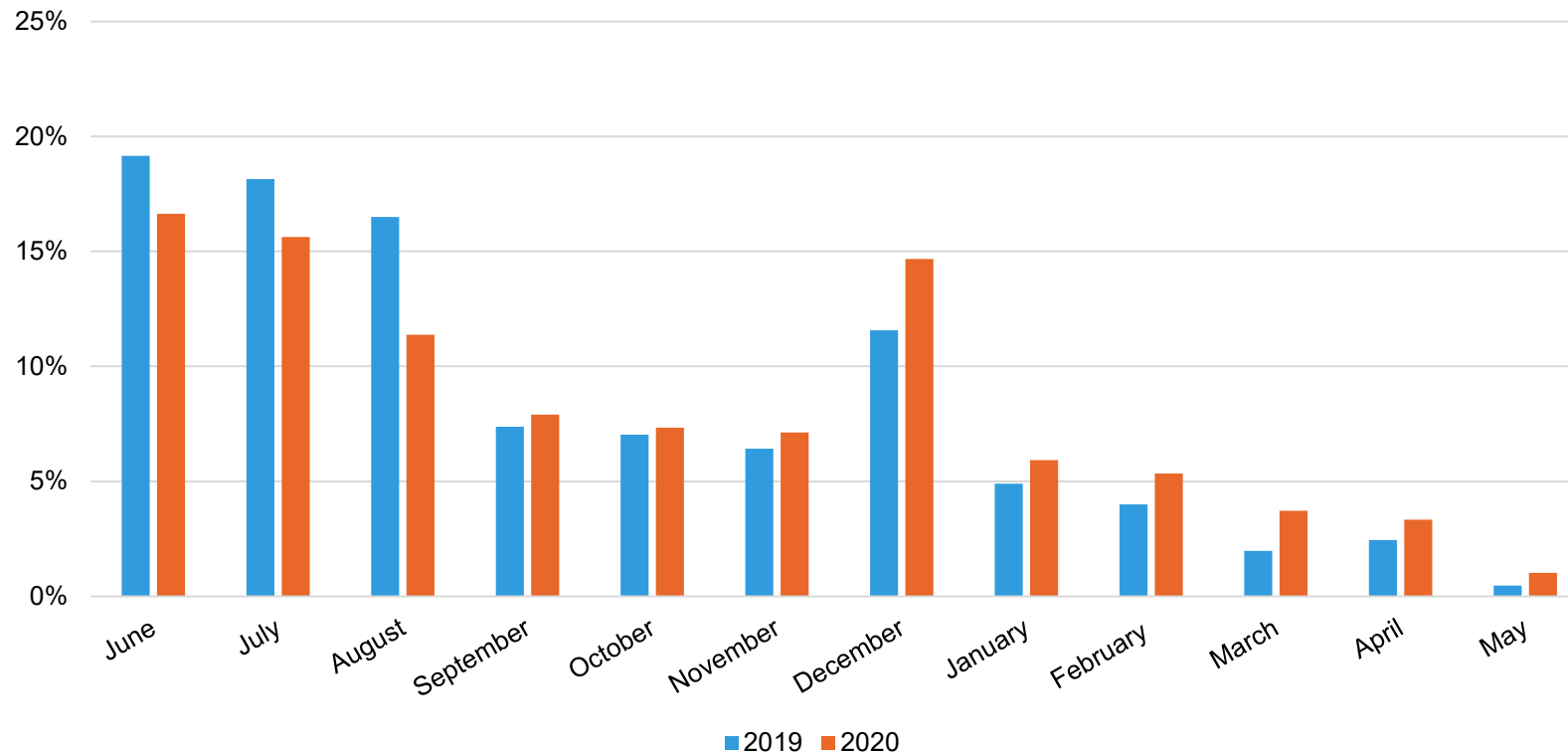
Travellers appetite for travel to the Caribbean shifts from Q3 to Q4



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Breakdown of international flight searches to the Caribbean performed in May for a departure in...



Flight searches from 1 to 31 May
2020 vs same period in 2019.



Only considered pax staying 1
to 21 nights at destinations.



Source: ForwardKeys Flight Search data.

Cuba and the Dominican Republic are the most searched destination from U.S.A, Canada and the UK for Q1 2021



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Top Searched Destinations in the Caribbean per Source Market

United Kingdom



1	Barbados
2	Cuba
3	Jamaica
4	Dominican Republic
5	Antigua and Barbuda

U.S.A



1	Puerto Rico
2	Dominican Republic
3	Bahamas
4	Cuba
5	Jamaica

Canada



1	Cuba
2	Dominican Republic
3	Guadeloupe
4	Puerto Rico
5	Bahamas



Flight searches from 1 to 30 May 2020.



Only considered pax staying at least 1 night at destination.



Source: ForwardKeys Flight Search data.



Skyscanner



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Outlook



Top 5 Caribbean inbound destination countries for International travellers Q4 outlook



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Top 5 Caribbean inbound destination countries for International travellers* – October, November & December 2020

**Total Inbound
for Caribbean**
YoY Var: **-36.3%**

	YoY % var	% Share
Dominican Republic	-49.5%	18.5%
Jamaica	-25.3%	15.2%
Aruba	-26.5%	10.8%
Puerto Rico	-26.3%	7.1%
Cuba	-60.9%	5.7%

*Excludes Domestic travel



Tickets confirmed as 19 June 2020 vs same period last year, for travel in October – December 2020 vs travel in October – December 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Ticket Data.

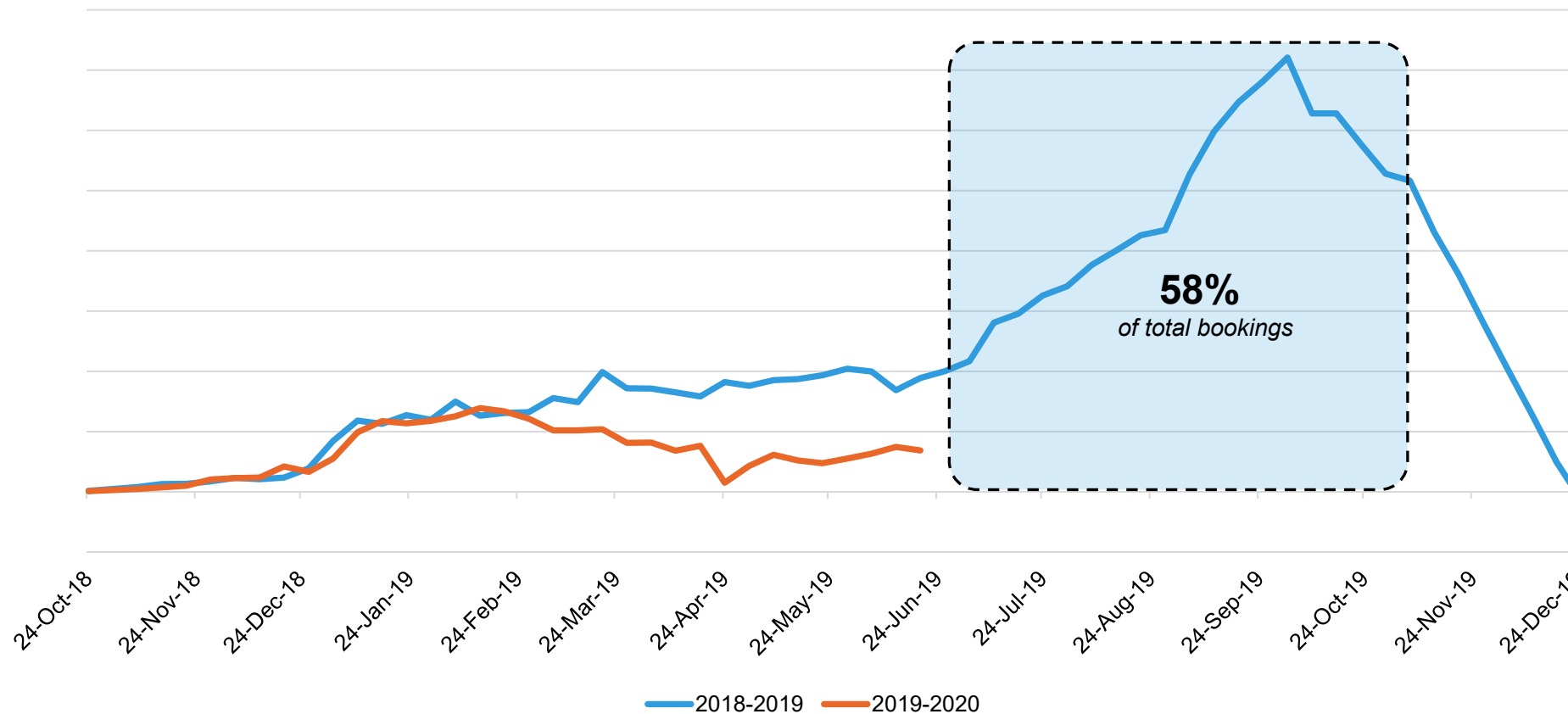
Long haul bookings for Q4 peak in September



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Long haul flight bookings to the LATAM for travel in October, November and December



Bookings made from 1 October 2019 to 13 June 2020 vs same period last year, for travel in October – December 2020 vs travel in October – December 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

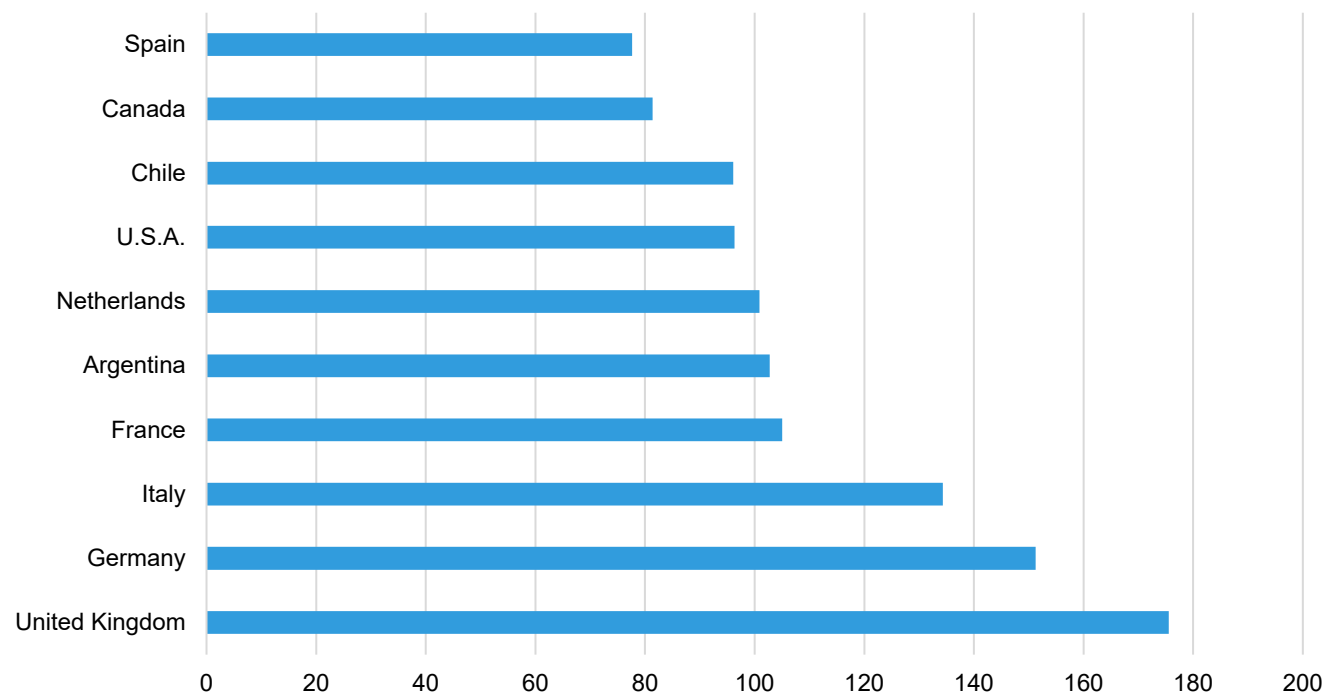
Lead times for top long-haul source markets to Caribbean



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Average Lead times* for Long Haul travel to Caribbean (average 110 days)



*Lead Time – the number of days between booking date and travel date. That is, how far in advance travellers book their trips



Average Lead Times for travel between 1 January and 31 December 2019



Only considered pax staying 1 night or more at destination.



Source: ForwardKeys Air Reservation data.

It is time to be data-driven






ForwardKeys
PREDICTING TRAVELLERS' IMPACT

GET IN CONTACT!



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Vice-President Insights

 +34 658 80 06 24

 olivier.ponti@forwardkeys.com



Check out the latest analysis at www.forwardkeys.com

RETURN TO THE SKIES

EMERGING AIRLINE SEARCH AND BOOKING PATTERNS FOR 2020/2021



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What we're facing...

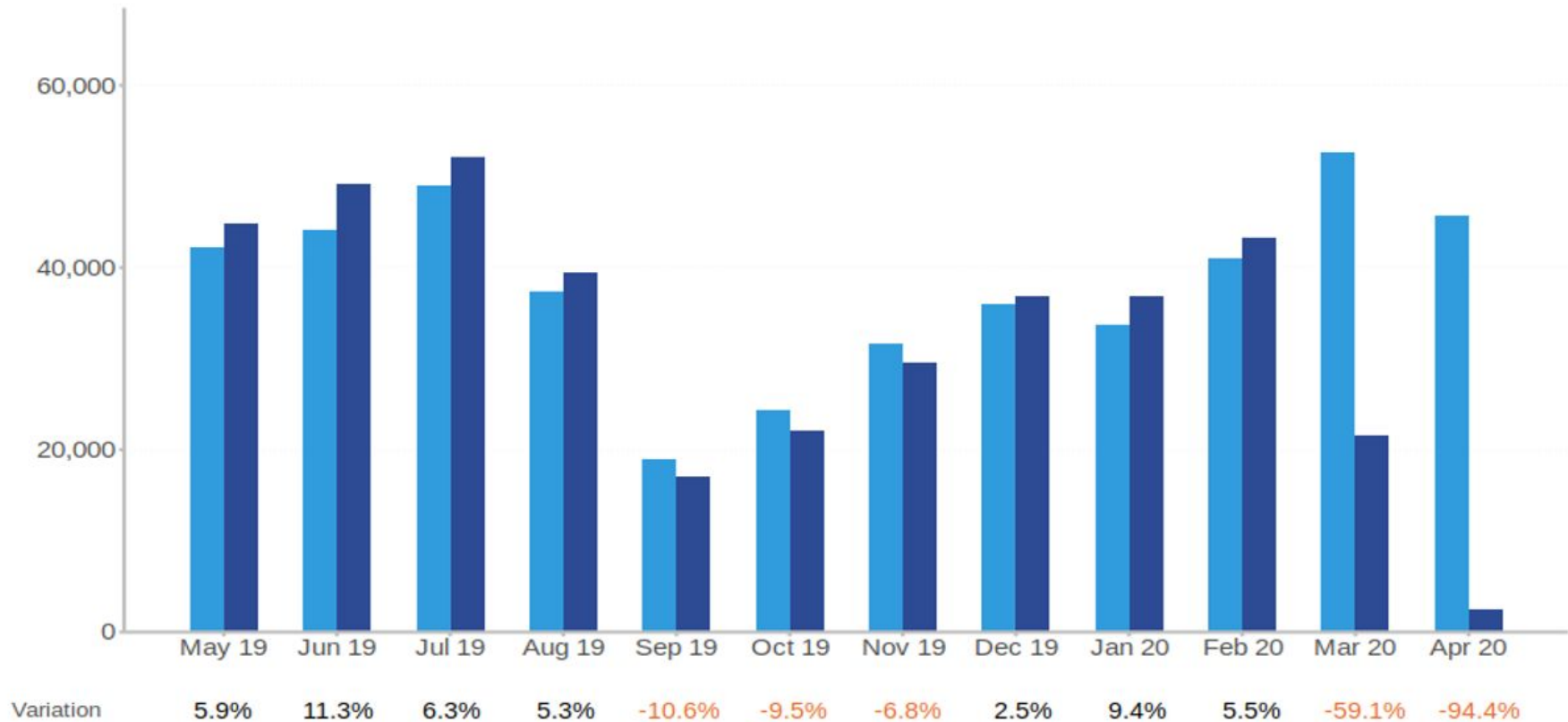
- 1 decline in key markets
- 2 'balancing act'
- 3 destination desire

What we're facing...

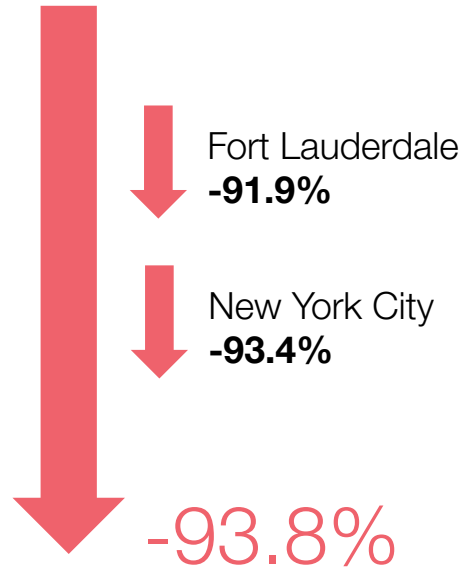
- 1 decline in key markets
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Arrivals in Bahamas from TOTAL INTERNATIONAL

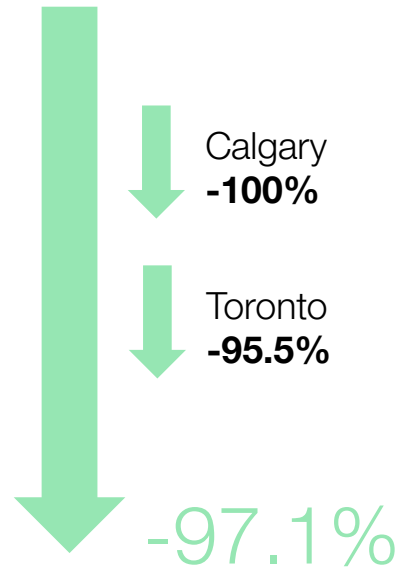
■ Arrivals: From May 18 to Apr 19 ■ Arrivals: From May 19 to Apr 20



US



Canada

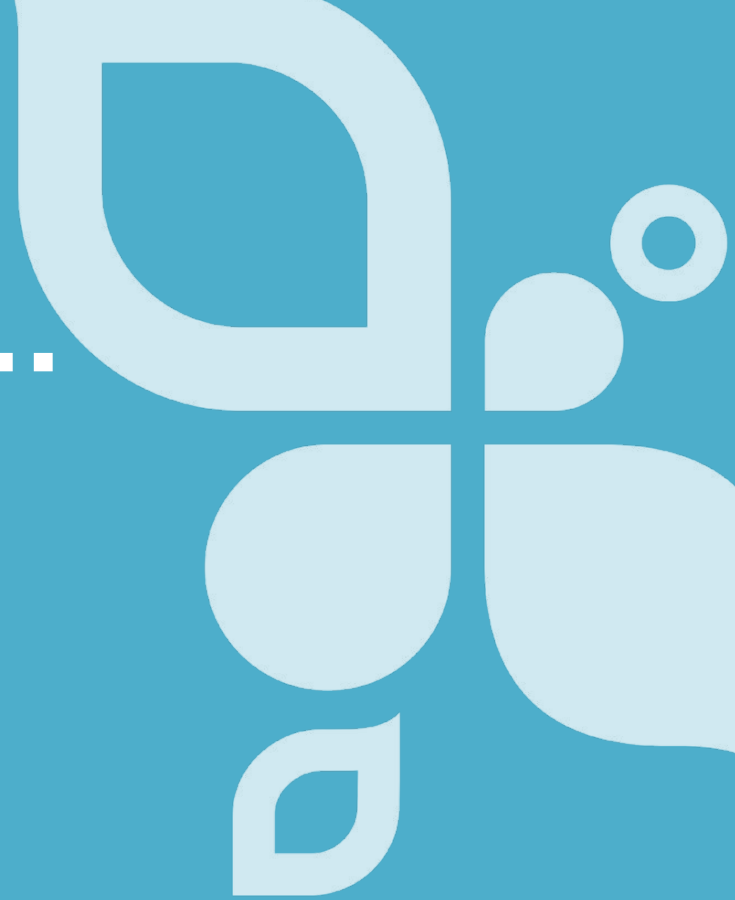


UK

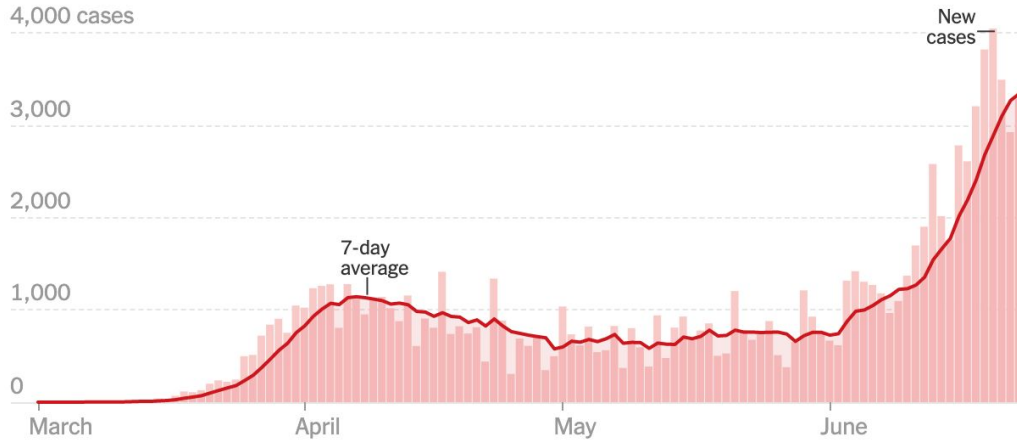


What we're facing...

- 1 decline in key markets
- 2 'balancing act'
- 3 destination desire



New reported cases by day in Florida

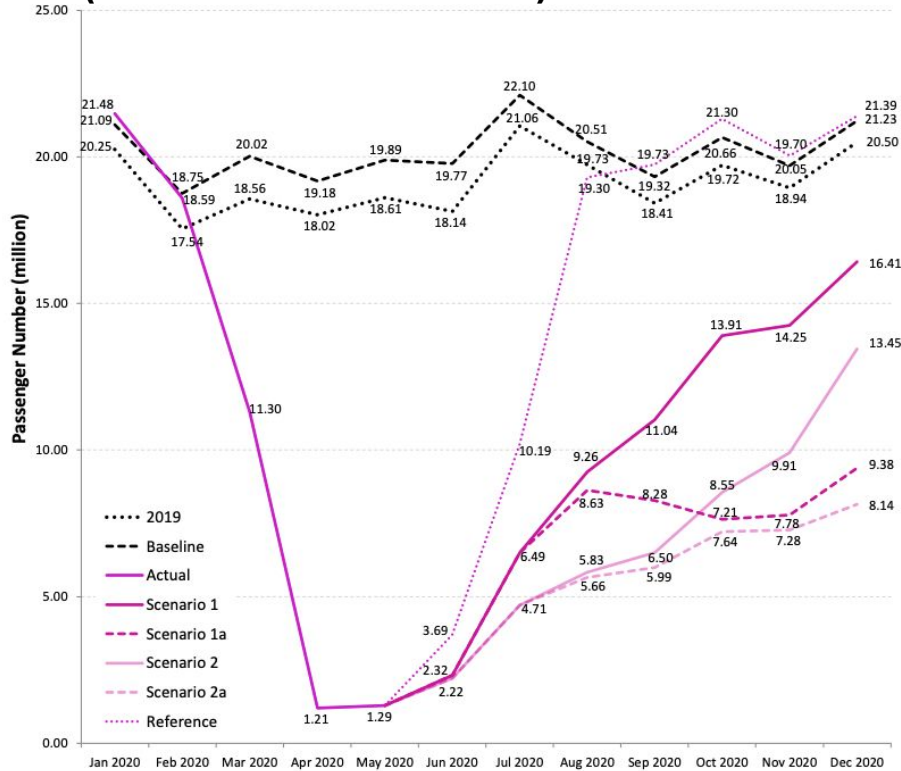


Rising cases in primary source markets create an immense challenge in reaching a **suitable equilibrium** to bring our tourism economy back online

Source: New York Times Coronavirus Database



Passenger numbers: 2019/2020 baselines versus COVID-19 adjusted projections (Latin America/Caribbean)



‘Balancing act’ needed
between anticipating increased
future arrivals and necessary
health and safety protocols to
protect both The Bahamas and
its visitors

Source: ICAO Coronavirus Economic Impact



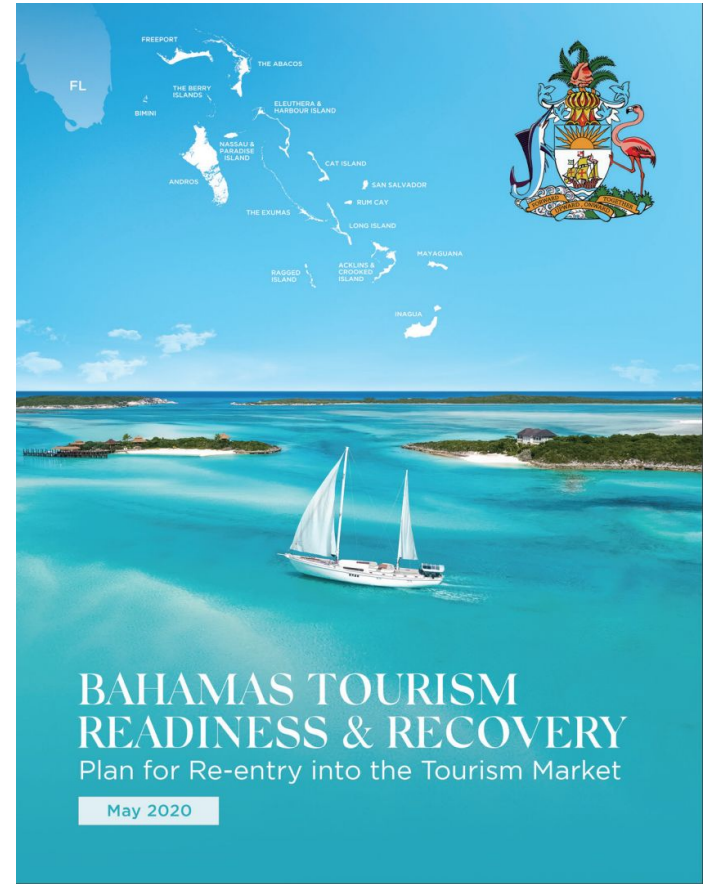
What we're facing...

- 1 decline in key markets
- 2 'balancing act'
- 3 destination desire

What will travelers look for in a post COVID-19 world?

1 Security/peace of mind

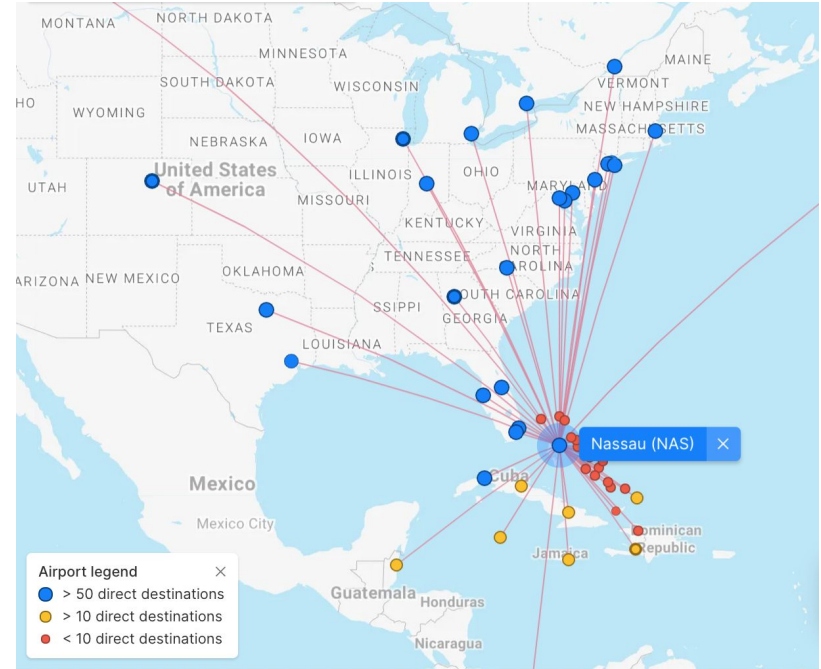
This comprehensive plan ensures that **every facet of the Bahamian tourism sector** is well-prepared for the re-opening of our economy.



What will travelers look for in a post COVID-19 world?

- 1 Security/peace of mind
- 2 Short-haul flights/non-stop service

Many U.S. cities — including **Miami, Atlanta, New York, Philadelphia, and Washington D.C.** fly directly into Nassau.



Source: FlightConnections.com



What will travelers look for in a post COVID-19 world?

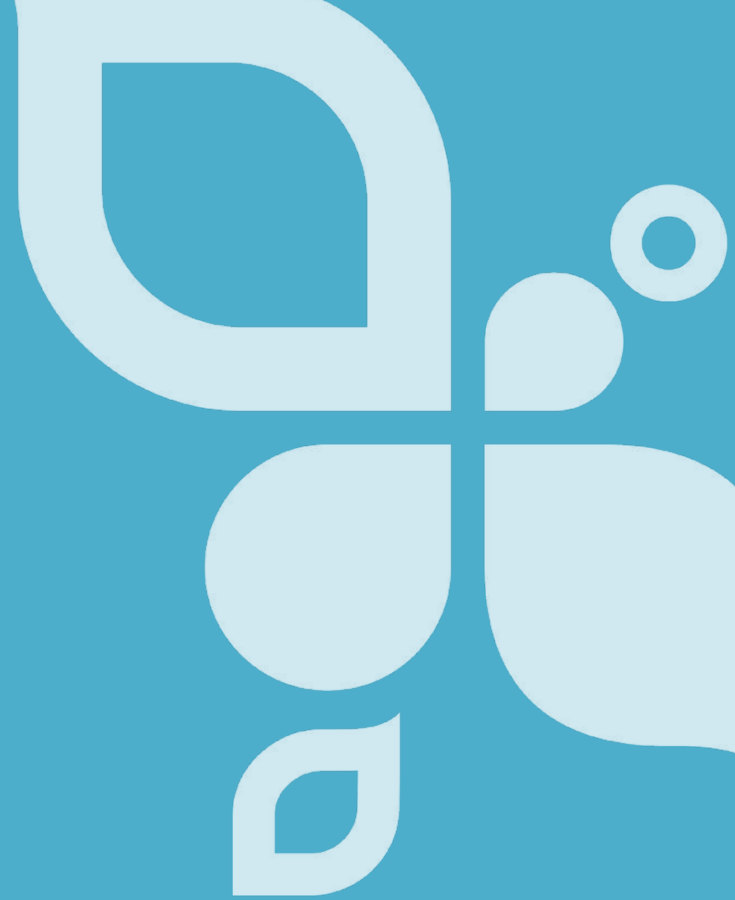
- 1 Security/peace of mind
- 2 Short-haul flights/non-stop service
- 3 Sun, sand, and... social distancing

With over 700 cays to explore...The Bahamas was **practically designed for social distancing.**



Health and safety

(by the numbers)



8200+

tourism
professionals
trained in
COVID-19 health
protocols

150+

tourism
stakeholders
actively monitoring
ongoing COVID-19
developments

6

tourism
compliance
workshops for
health and safety





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Thank You for Attending!
Happening Next Week



Guest Assurance and Insurance:
Trip Mate Travel Protection Plan
Thursday, July 2, 2PM ET

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CARIBBEAN TOURISM HEALTH SAFETY TRAINING SERIES

Wednesday, July 1, 2020

Accommodations - Public Areas

11:00 - 12:15PM ET (English)

Alojamiento - Areas Publicas

3:00 - 4:15PM ET (Espanol)



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