



2020 CARIBBEAN TRAVEL OUTLOOK

PRESENTED BY CARIBBEAN JOURNAL

JUNE 2, 2020



WELCOME AND INTRODUCTIONS

Alexander Britell, Editor-in-Chief
Caribbean Journal

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GENERAL OUTLOOK FOR THE CARIBBEAN

Frank Comito, Chief Executive Officer, CHTA



CARIBBEAN UPDATE

Diana Plazas, Chief Sales & Mktg Officer,
Caribbean/LATAM, Marriott International

Mariela Sánchez, General Manager, Specialty Sales
Development, Delta Air Lines



GENERATING DESTINATION DEMAND POST-COVID 19

Leah Chandler, CDME, Chief Marketing Officer,
Discover Puerto Rico

Ronella Tjin Asjoe-Croes, Chief Executive Officer,
Aruba Tourism Authority



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GENERAL OUTLOOK FOR THE CARIBBEAN

Frank Comito, Chief Executive Officer,
CHTA



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Caribbean Journal
“2020 Caribbean Travel Outlook”

Presentation by Frank Comito, CHTA
June 2, 2020

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- **Tourism's Global-Regional Economic Performance and Covid-19 Impact**
- **Industry's Mitigation Efforts – CHTA Areas of Focus**
- **Industry's Outlook**

Global Performance

Travel & Tourism Economic Impact 2020 (2019 Figures)

2.5%

Global GDP growth

3.5%

Travel & Tourism GDP growth

10.3%

Travel & Tourism total contribution to global GDP

330 mn

Jobs supported by Travel & Tourism

1/10

Jobs supported by Travel & Tourism

1/4

of all new jobs created came from Travel & Tourism

28.7%

International Spend

VS

71.3%

Domestic Spend

21.4%

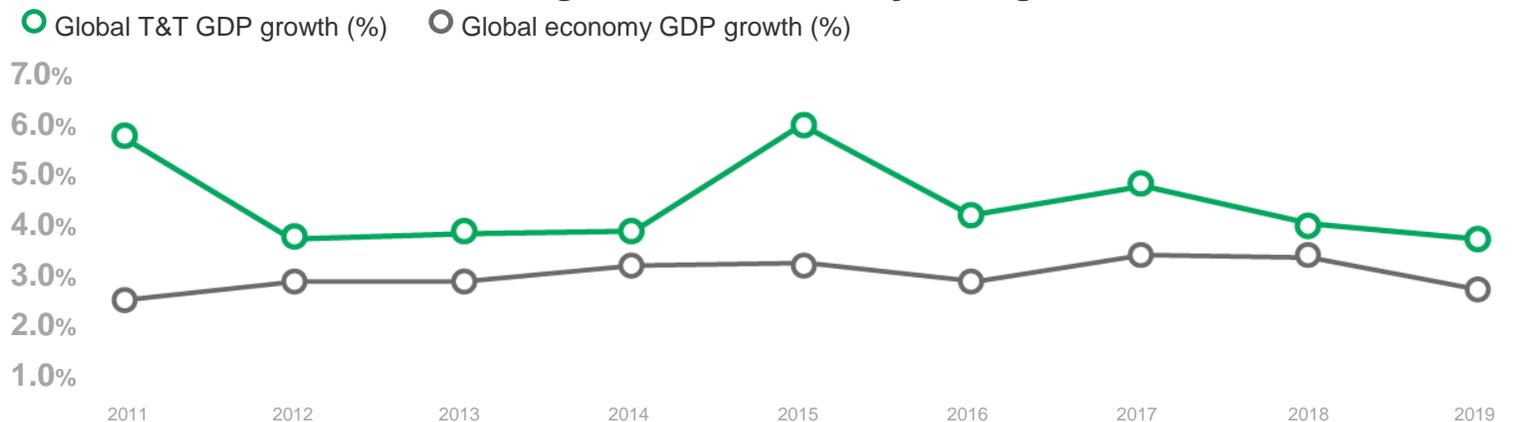
Business Spend

VS

78.6%

Leisure Spend

World's Travel & Tourism GDP growth vs. economy GDP growth, 2011-19





Caribbean

Travel & Tourism Economic Impact 2020
(2019 Figures)

13.9%

Travel & Tourism
contribution to GDP
(\$58.9 bn)

15.2 %

Jobs supported by
Travel & Tourism
(2.8 million)

3.4 %

Travel & Tourism
GDP growth

1.9%

Economy GDP
growth



Travel & Tourism jobs 2019:

330 MILLION
= **1 in 10** jobs

1 in 4 of all net new jobs were created by Travel & Tourism over the last five years



Travel & Tourism GDP 2019:

10.3% of global economy
= **\$8.9 trillion**

3.5% Travel & Tourism GDP growth vs. 2.5% real economy GDP growth

UNPRECEDENTED PROJECTED LOSSES FOR 2020

Travel & Tourism jobs:



**100.8
MILLION**
job losses

↓31%

Travel & Tourism GDP:



**2.7
TRILLION**
USD

↓30%



Travel & Tourism global economic impact of COVID-19:

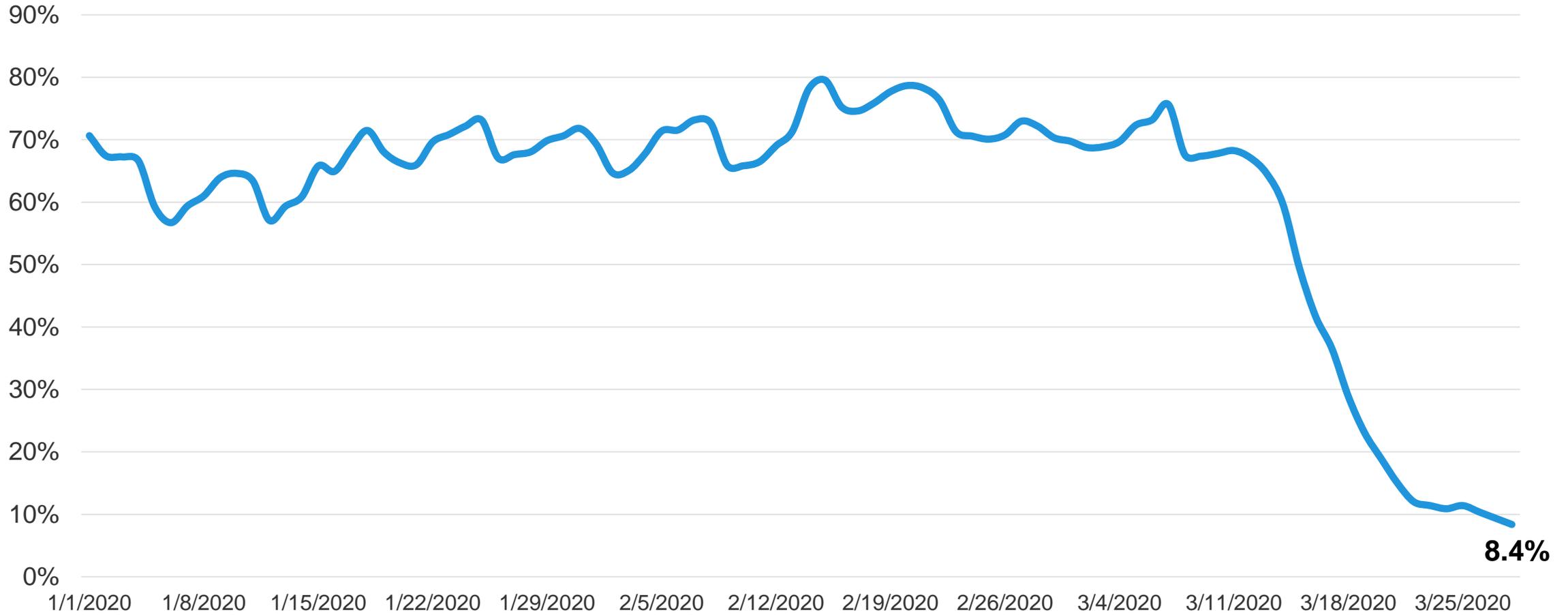
5x
the impact of the
**2008 Global
Financial Crisis**

↑2.9 percentage point

Global unemployment rate directly from Travel & Tourism job losses.

Caribbean Hotel Occupancy Rate Moves to Single Digits

Total Caribbean, Absolute Occupancy, Daily Data, January 1st – March 28th 2020



Impact of COVID-19 in the Caribbean

ON AVIATION INDUSTRY



-\$5.3 billion

Impact on Revenues.
Change 2020 vs. 2019



-\$740 million

Change in GDP – Impact on Aviation



-23,000

Change in Jobs

Airline	Flight Number	Time	Status
Silver	74	1:25P	Cancelled
Southwest	820	12:06P	Cancelled
Southwest	3921	10:40A	Cancelled
jetBlue	800	11:15A	Cancelled
Southwest	3925	1:15P	Cancelled
jetBlue	2032	10:48A	Cancelled
Southwest	3346	9:35A	Cancelled
UNITED	2083	11:05A	Cancelled
UNITED	2040	1:39P	Cancelled
jetBlue	2328	12:05P	Cancelled
Southwest	5618	9:10A	Cancelled
Southwest	766	8:40A	Cancelled

September 2, 2019 5:46A

Destination
San Francisco
St. Louis
St. Louis
Tallahassee
Tampa
Tampa
Tampa
Toronto
Washington-Dulles
Washington-Reagan

Monday





2020 Estimated Impact to Date Direct, Indirect, Induced

\$6B

Estimated Loss in
Earnings from Tourism
Between March and May

\$2B

Estimated Loss in
Tax Revenue Attributed to
Tourism-Related Activities

**One
Million+**

Estimated Temporary Job
Losses Related to Tourism

Note: Preliminary estimation by CHTA based upon information available as of May 15, 2020



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CHTA Covid-19 Caribbean Tourism Impact and Outlook Survey

April 2020





- **69% of Caribbean Hotels Hope to Reopen by end of July**
- **Intra-Caribbean Business and Leisure Travel expected to return first, followed by stopover travel from the U.S. and Canada, then from Europe.**
- **Gradual recovery expected, with 28% expressing confidence in a tourism turnaround beginning by the end of 2020 but most anticipating the turnaround to take longer, into the first half of 2021 and beyond.**
- **Other industry data indicates hotel occupancy thru end of year expected to be 10-40% between June and end of year; next winter/spring will still likely be running under 50 percent during the traditional peak season.**
- **Hotels peg break-even occupancy level at 52% with austerity measures.**
- **43% of Covid-19 induced cancellations expected to rebook. Most hotels honored a no-penalty rebooking window of 12 months.**



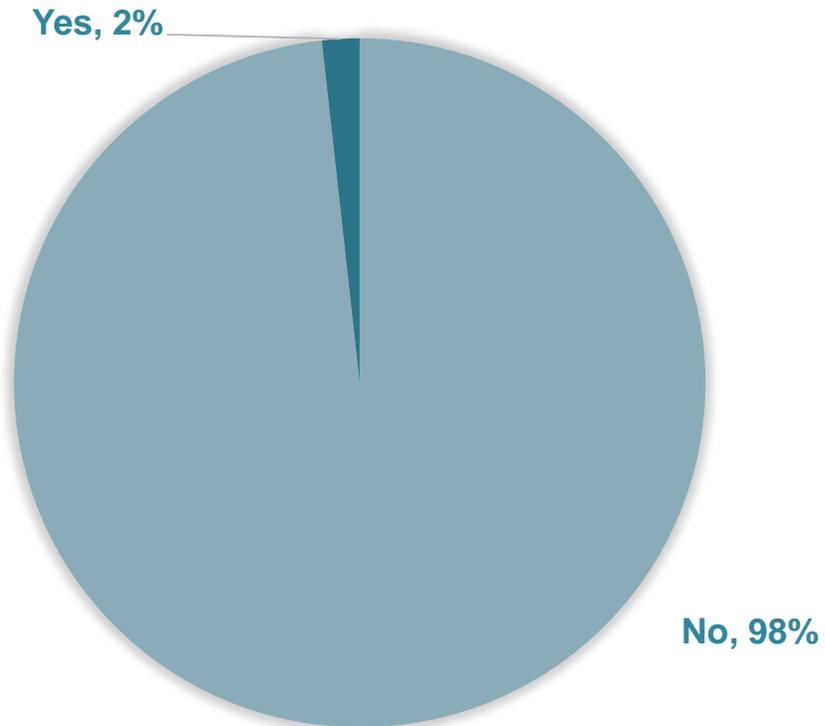
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HEALTH SAFETY TRAINING & Mitigation





To your knowledge have you had a guest or employee test positive for Covid-19?





What changes do you plan to put in place to address health safety concerns by guests and employees? (Check all that apply).



Other Changes Include:

- Contingency Planning and Risk Analysis
- Daily Temperature Checks for All Employees
- Advocate through NHTA for Government Implementation of Restrictions
- Room Purification
- Closed Property



CHTA and Industry Current Areas of Focus

- **Information Sharing** – *First Webinar Alert February 4th; Covid-19 Resource Online Resource Center; Ongoing Webinar Series*
- **Research** – *Impact and Outlook Surveys; Collating and Sharing*
- **Coordination/Collaboration**–*Global-Regional-Local; Caribbean C-19 Task Force*
- **Health Safety Protocols Focus** – *Collating and Sharing; Developing Core Protocols/Standards, Caribbean Traveler Assurance Initiative*
- **Advocacy** – *Within Industry; With Governments; Possible Regional Health Safety Protocols*
- **Airlift** – *Engaging Airlines*
- **Communications/PR** – *Members, Trade, Media, Resource Center, Consumer*
- **Training** – *Resilience Series; Operational, Health Safety Focus; CHTAEF Offerings*
- **Capacity Shortfalls** – *CHTA, NHTAs and Roundtables on Solutions*

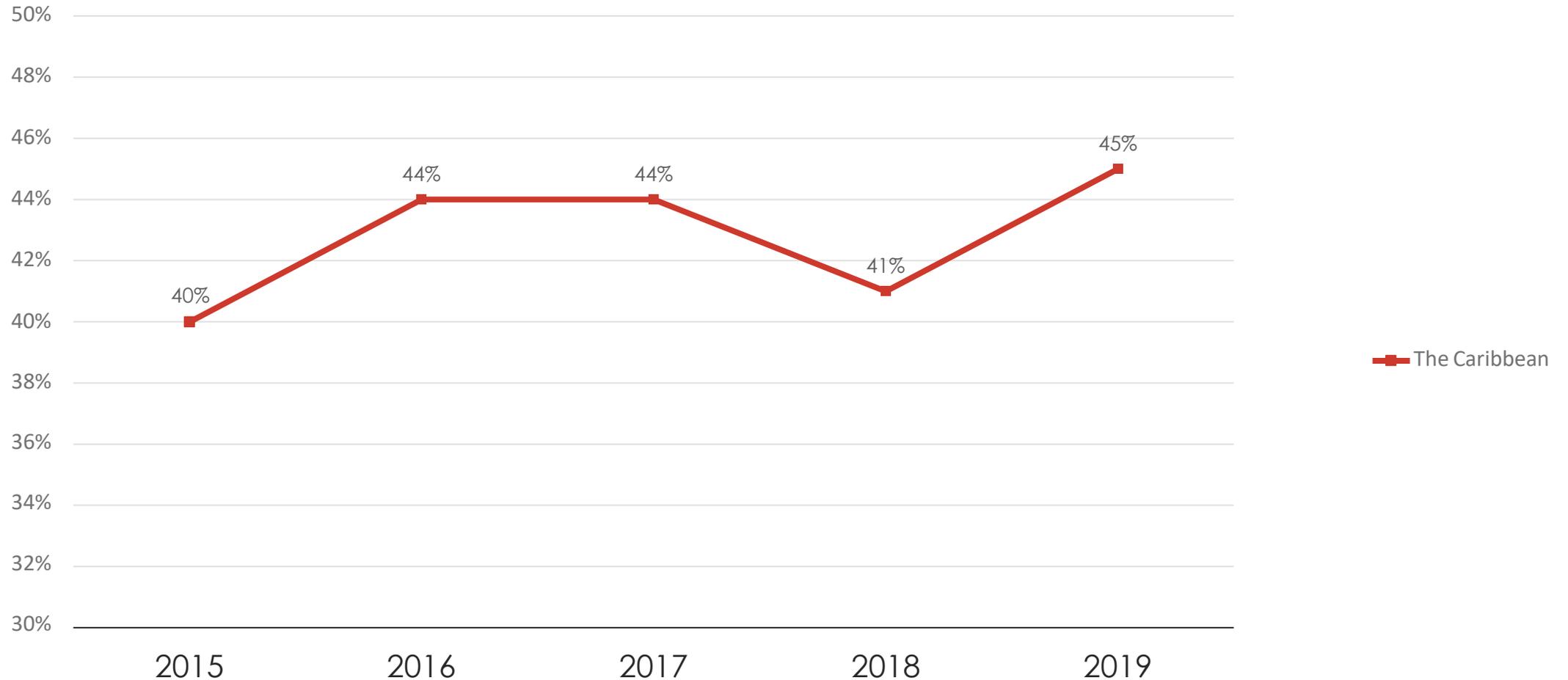


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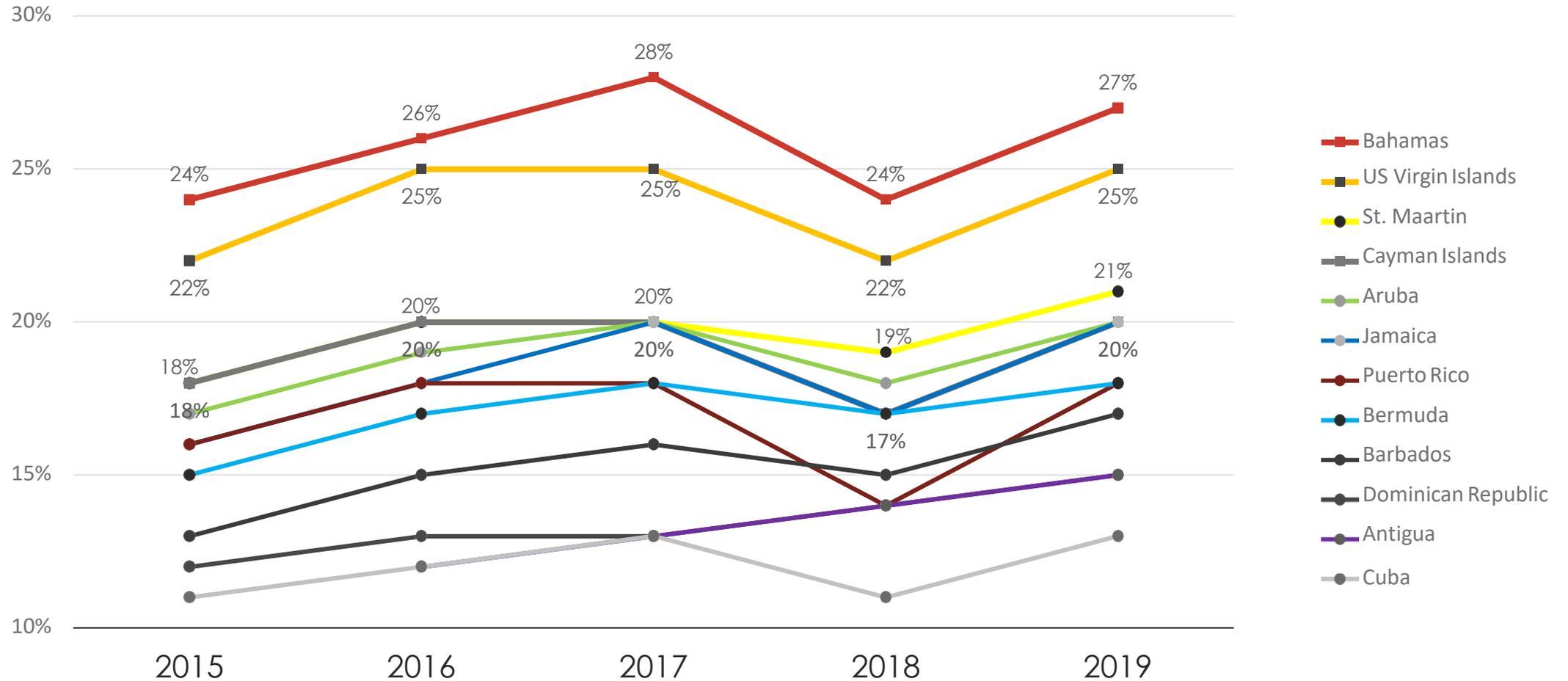


INDUSTRY OUTLOOK

INTEREST IN VISITING CARIBBEAN DESTINATIONS



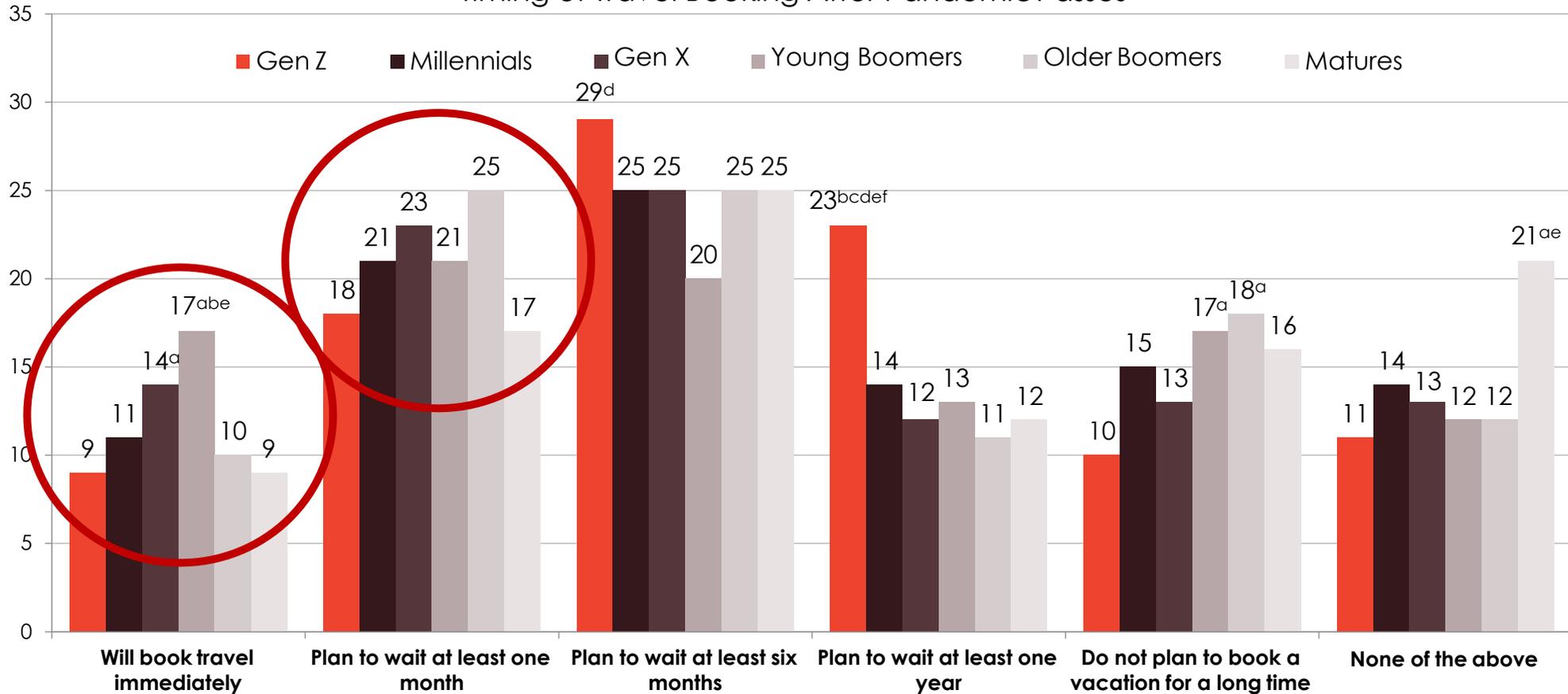
INTEREST IN VISITING CARIBBEAN DESTINATIONS



CORONAVIRUS

TRAVEL INTENTIONS AFTER PANDEMIC PASSES

Timing of Travel Booking After Pandemic Passes



MM6. Once the COVID-19 pandemic passes and travel restrictions are lifted, how quickly do you plan to book a vacation or leisure trip?
 Base: Total Respondents
 Source: MMGY Global, travelhorizons, Wave II 2020

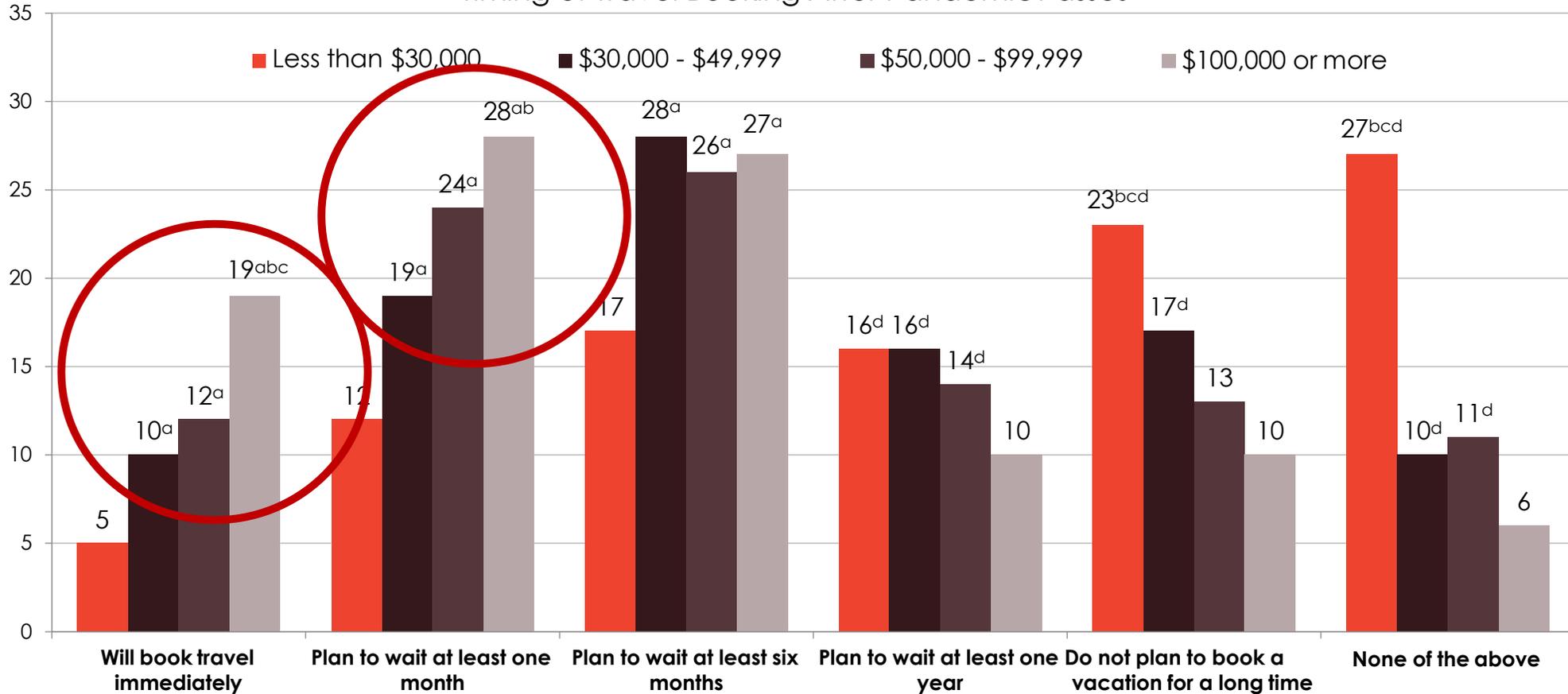


a Denotes a statistically significant difference from Gen Z
 b Denotes a statistically significant difference from Millennials
 c Denotes a statistically significant difference from Gen X
 d Denotes a statistically significant difference from Young Boomers
 e Denotes a statistically significant difference from Older Boomers
 f Denotes a statistically significant difference from Matures

CORONAVIRUS

TRAVEL INTENTIONS AFTER PANDEMIC PASSES

Timing of Travel Booking After Pandemic Passes



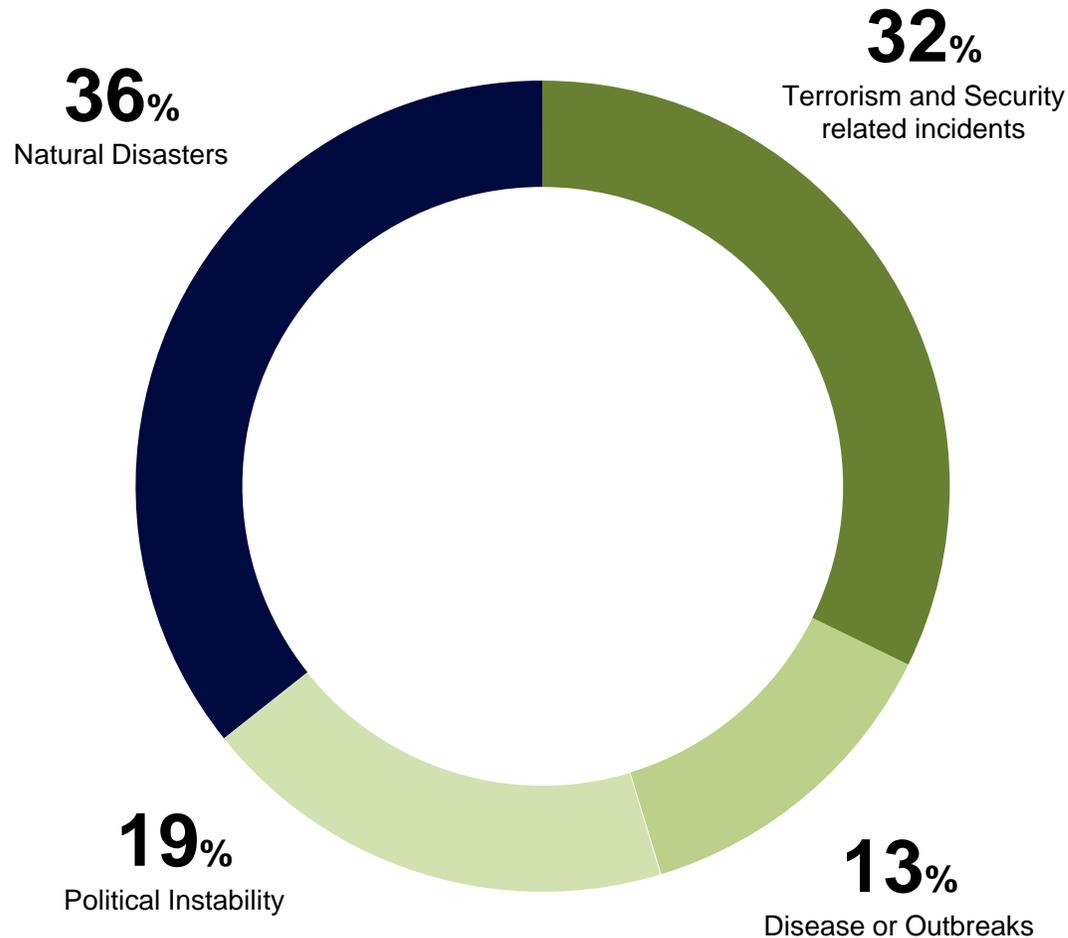
MM6. Once the COVID-19 pandemic passes and travel restrictions are lifted, how quickly do you plan to book a vacation or leisure trip?
 Base: Total Respondents
 Source: MMGY Global, travelhorizons, Wave II 2020



a Denotes a statistically significant difference from less than \$30,000
 b Denotes a statistically significant difference from \$30,000 - \$49,999
 c Denotes a statistically significant difference from \$50,000 - \$99,999
 d Denotes a statistically significant difference from \$100,000 or more

90 Crises

(2001-2018)



Key Findings

- Crises are more frequent but diminishingly disruptive
- Recovery duration has decreased significantly from 26 months in 2001 to 10 months in 2018

Average Recovery Times

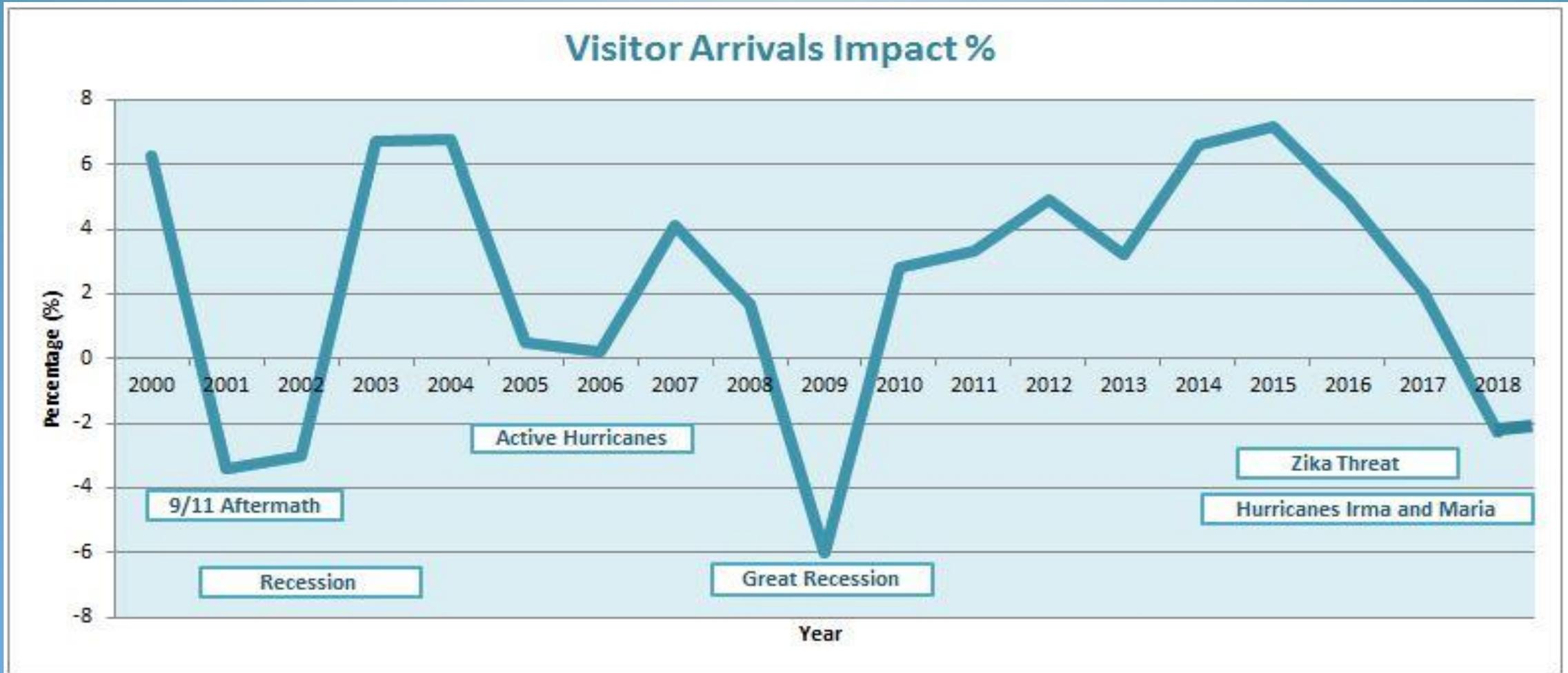


Minimum Recovery Times

Tourism is Resilient: Caribbean Tourism Performance During Recessions, Major Hurricanes, Zika



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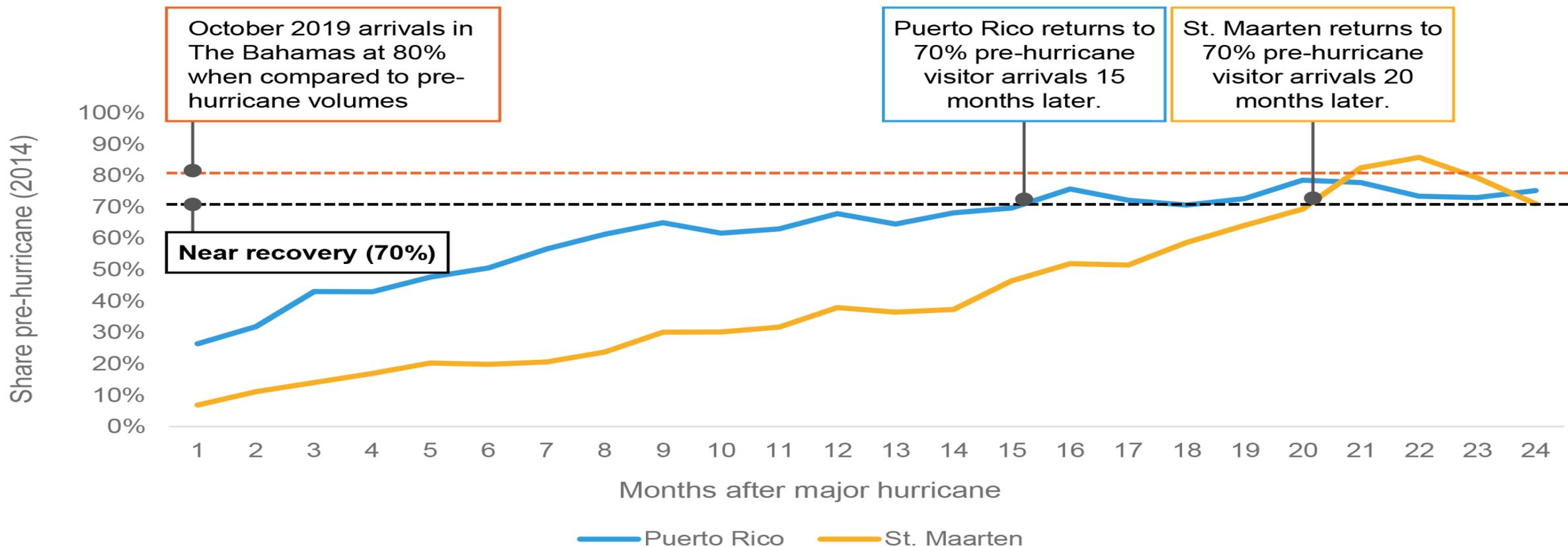


Caribbean Tourism Performance During Recessions, Major Hurricanes, Zika



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Recovery period after major hurricanes for Bahamas, St. Maarten and Puerto Rico, 2017 and 2019 vs 2014

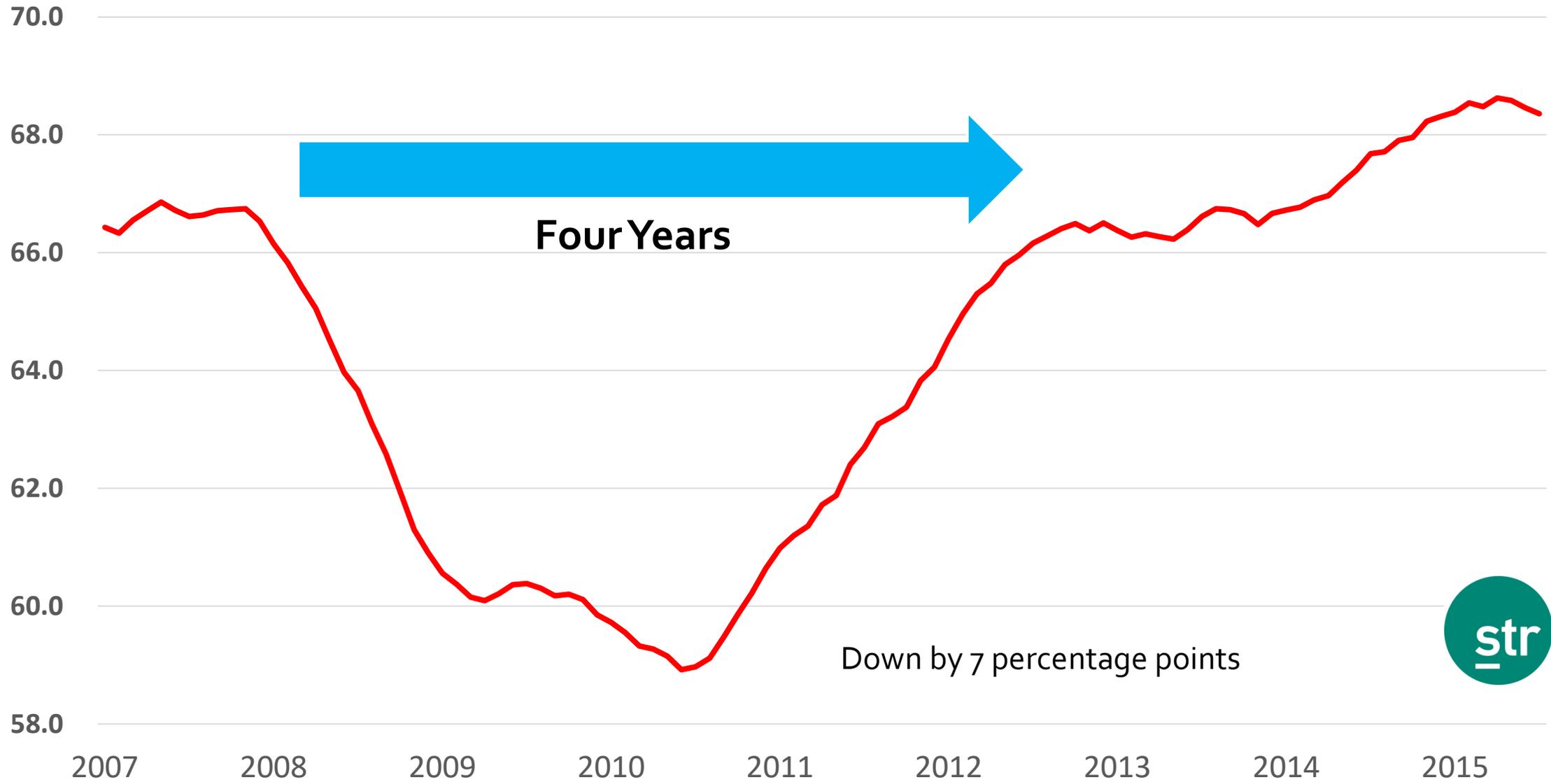


International arrivals from 1 Oct 2017 to 30 September 2019 vs. same month in 2014.
Forward bookings for arrivals in The Bahamas from 1 November to 31 December vs same month 2014.



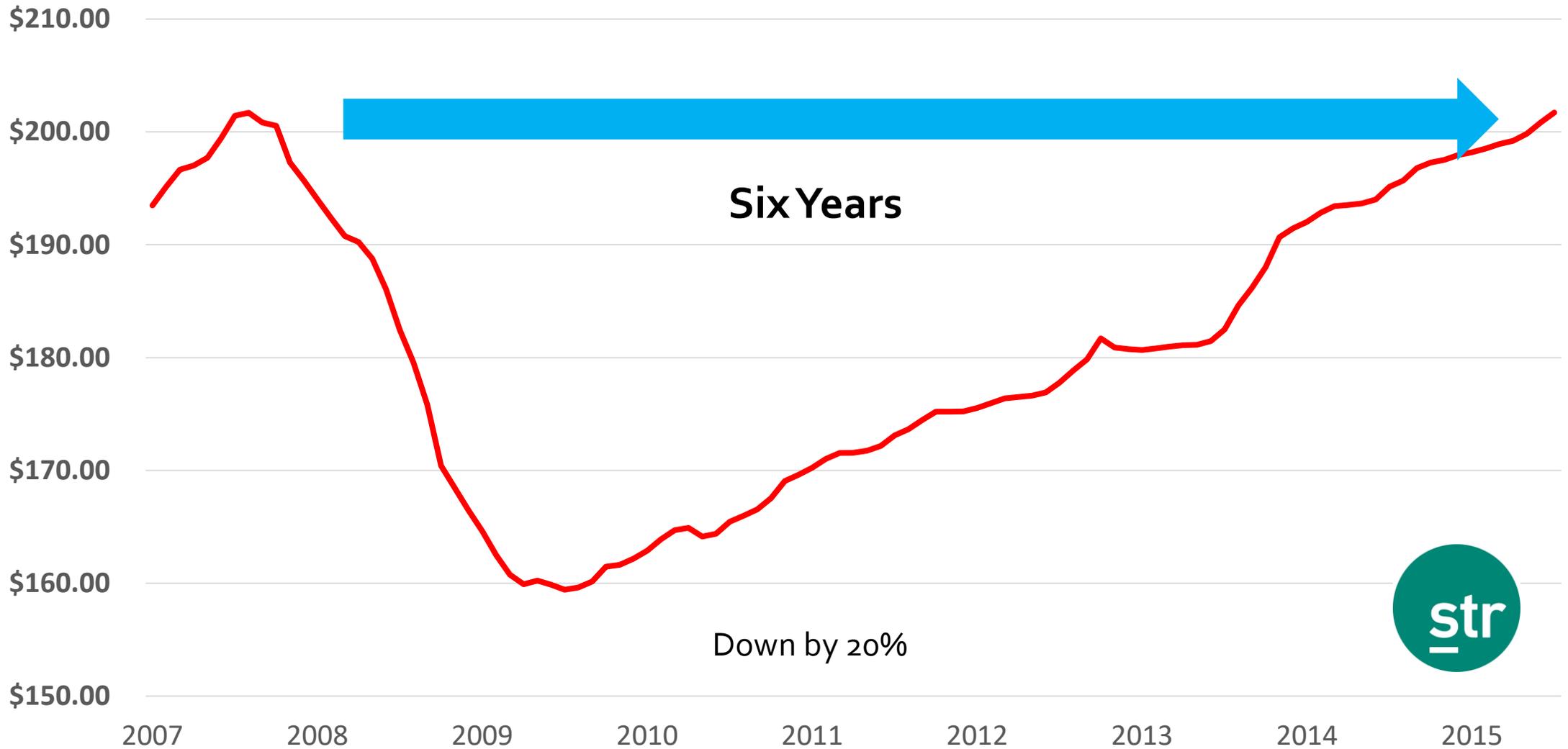
Only considered stays between 1 to 21 nights at the destinations. Excluded transfers, day trips and one-way trips.

Caribbean Hotel Room Occupancy



Caribbean Hotel ADR

Rolling 12 month average



Expediting Tourism's Path to Recovery: Crisis is an Opportunity

Recovery Focus

Business Friendly Policies to support recovery, prevent closures, encourage rehiring, provide clarity, reduce cost of health safety measures...

Improve the Traveller Experience – Work on *'Clean, Healthy, Safe, 'No Touch' Protocols...*

Public Relations and Marketing– Push Facts...Ease consumers worries about travelling.... Educate and Inform Employees, Trade, Consumer



Plan for the long term –

- Sustainable Rebuild
- Don't Loose Sense of Place.
- Capitalize on market differentiation

Collaboration by All

Stakeholders ...Focus on Common Good and Not What Divides Us.

Train – Health Safety and

Professional Development - Use Industry Down Time to Improve Skills - Increase investments in training and education



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Thank You

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CARIBBEAN UPDATE

**Diana Plazas, Chief Sales & Mktg Officer, Caribbean/LATAM,
Marriott International**



DEMAND IN THE CARIBBEAN



INSPIRING THE FUTURE

“THE WORLD IS A BOOK AND THOSE
WHO DO NOT TRAVEL ONLY READ
ONE PAGE”

~SANTI AUGUSTINE



GUEST JOURNEY: OUR COMMITMENT TO CLEAN

COMMON SPACES

MARRIOTT COMMITMENT TO CLEAN

ARRIVAL SPACES

- 1 PARKING**
Modified lots to promote walkway, adjusted protocols for guest parking for guest and associate safety.
- 2 SKITTLES + TRANSFORMATION**
Reduced seating capacity, modified or removal of foodcourt (if applicable), all temporary bar activities and event pop-ups.
- 3 BELL CARS**
Luggage service offered outside the hotel, bell cars sanitized after each use.
- 4 DOOR HANDLES + KNOBS**
Modified entry systems including door propped open, no-touch foot opening, touchless, or automatic entryways.
- 5 CLEANING + DISINFECTING**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 6 HAND SANITIZER DISPENSERS**
Dispensers installed throughout hotel, with focus in high-traffic areas.
- 7 LOUNGE FURNITURE + QUEUES**
Modified floor plans, reduced seating capacity, passing through floor airlocks and machines.
- 8 PUBLIC RESTROOMS**
Deep clean, frequent cleaning of public restrooms frequently and after high guest use.
- 9 BUSINESS CENTERS**
Equipment sanitized for business use, wireless printing options.

GUEST CHECK-IN

MARRIOTT COMMITMENT TO CLEAN

FRONT DESK

- 1 MOBILE CHECK-IN & MOBILE KEY**
Selection of the mobile keychain app: check-in, go over your room, or create a mobile keychain to your mobile device.
- 2 SELF-SERVICE KIOSKS**
Adjustable screens in elevators for contactless check-in, check-out, mobile keychain, mobile check-in.
- 3 QUEUES + STANCHIONS**
Stanchions through lobby areas and stanchions to separate the queue of self-service kiosk registration.
- 4 ASSOCIATE CARE**
Personalization of front desk, associate focus on hygiene and infection.
- 5 HAND SANITIZER DISPENSERS**
Dispensers placed throughout hotel, with focus in high-traffic areas.
- 6 DISINFECTING KEY CARDS**
Disinfectant for remote entry, high-use hand sanitizer in lobby area.
- 7 BELL CARS**
Luggage service offered outside the hotel, bell cars sanitized after each use.
- 8 CONTACTLESS**
Contactless services like mobile keychain, mobile check-in, mobile check-out.
- 9 RETAIL + MARKET**
Personalized service, mobile keychain, mobile check-in, mobile check-out, mobile check-out, mobile check-out, mobile check-out.

MARRIOTT COMMITMENT TO CLEAN

GUEST ROOMS

- 1 ENHANCED CLEANING**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 2 FURNITURE**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 3 AMINITY KIT**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 4 HIGH TOUCH ITEMS**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 5 REMOVAL OF NON-ESSENTIAL ITEMS**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 6 EQUIPMENT**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 7 REMOVAL OF SHARED USE**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 8 ASSOCIATE ENTRY + PPE**
Deep clean, frequent cleaning of high-traffic and high-touch areas.
- 9 DISTANCE**
Deep clean, frequent cleaning of high-traffic and high-touch areas.

GUEST ROOMS

GUEST JOURNEY: OUR COMMITMENT TO CLEAN

RESTAURANTS + BAR

MARRIOTT COMMITMENT TO CLEAN

RESTAURANTS + BARS

- ENHANCED CLEANING**
Modified floor plans and reduced seating to ensure ample distancing surfaces needed before guest use.
- RESERVATIONS**
Online booking and seating times to help reservations to better flow around daily.
- FOOD SAFETY**
Apparatuses we use for food handling comply with all state and health food safety practices.
- BAR SERVICE**
Critical equipment sanitized between use; modified procedures for garnishes and glassware.
- ALTERNATE MENU OPTIONS**
Alternate menu options including paper napkins, paper or plasticware, contactless food options.
- FOOD DISPLAYS**
Utilization of anti-modification of self-serve food stations; modified service in place for food display.
- SELF-SERVICE APPLIANCES**
No location of self-serve appliances; contactless use; elimination of shared items or shared items.
- GRAB AND GO**
Modified food delivery including grab-and-go or delivery, and ready-to-go options.
- PAY AT TABLE OPTIONS**
Reduced handling of guest personal property; alternate payment options including contactless and self-serve.

SPA + FITNESS

MARRIOTT COMMITMENT TO CLEAN

SPA + FITNESS

- ENHANCED CLEANING**
Sanitization of equipment, treatment rooms, spa tubs, saunas, showers, and high-touch surfaces as cleaned routes.
- SANITATION STATIONS**
Hand sanitization stations located in treatment rooms.
- PHYSICAL DISTANCING**
Modified floor plans to increase space between equipment, saunas, etc.
- SHARED USE ITEMS**
No location of shared gear, robes, towels, linens, etc. or shared items; self-serve or grab-and-go items; physical alternatives.
- LOCKER ROOMS**
Locker and bag use; hand sanitizer in locker rooms; contactless lockers; physical alternatives.
- FINNISH ALTERNATIVES**
Alternative of in-room and outdoor fitness alternatives.
- MENU OF SERVICES**
Inclusive service alternatives on all levels; alternative treatments; self-serve or grab-and-go items.
- APPOINTMENT SCHEDULING**
Reservations; contactless booking; appointment and length; to allow for reduced waiting between appointments.
- PAYMENT**
Elimination of credit card payments; contactless payment; handling of guest personal property.

MARRIOTT COMMITMENT TO CLEAN

POOL + RESORT

- ENHANCED CLEANING**
Increased frequency of high-touch surfaces in every room; enhanced cleaning of shared surfaces and furniture between use.
- FOOD + BEVERAGE**
Clear signage for food delivery, pickup, and consumption; no high-touch surfaces; contactless service.
- PHYSICAL DISTANCING**
Provision of 12-foot outdoor tables, chairs, and equipment in pool, beach, golf and resort areas.
- SELF-SERVICE STATIONS**
Self-serve stations for pool towels, umbrellas, and equipment; no shared items.
- CABANAS**
Step back, outdoor cabana use; no shared items; contactless service.
- TOWEL STATIONS**
Towel racks, hangers, or storage bins; no shared items.
- BEACH EQUIPMENT**
Self-serve poolside, beach, and resort areas; no shared items; contactless service.
- KIDS CAMP + PLAYGROUND**
Modified equipment; no shared items; contactless service.
- TENTS**
Modified equipment; no shared items; contactless service.

POOL + RESORT

PARTNERSHIPS

KEY TO RECOVERY

Working as **ONE** united travel industry with shared responsibility



CUSTOMER TRENDS

WHAT ARE WE HEARING?

PIPELINE

PROJECTS

COMMITTED TO DOING GOOD AND GROWING OUR
BUSINESS IN THE CARIBBEAN

FOLLOWING MARKET NEEDS

INNOVATION

Blended meetings with
virtual and in person
attendees



A woman with long dark hair, wearing a yellow bikini, is sitting on a sandy beach with her back to the camera, looking out at the turquoise ocean. The water is clear and vibrant, with gentle waves washing onto the shore. The sky is a deep, clear blue.

ALL-
INCLUSIVE
BY MARRIOTT INTERNATIONAL



Marriott
INTERNATIONAL

THANK YOU!



CARIBBEAN UPDATE

**Mariela Sánchez, General Manager, Specialty Sales
Development, Delta Air Lines**



SAFER TRAVEL IS HERE

SETTING THE STANDARD FOR SAFER TRAVEL



At every step of your travel journey, you can be sure that we've raised the standard by putting measures in place that are in accordance with the CDC and WHO to help keep you safe and give you more peace of mind. So when you're ready to fly, know that we're ready to take care of you.

Check-in & Bag Drop

Providing a safer experience starts when you step in the airport. Explore the ways we're providing a safer flight experience starting at check-in.



Plexiglass safety barriers

- 1** All customers must wear a mask or face covering, and extra masks and wellness kits will be available at check-in if you need one.
- 2** Kiosks are being wiped down and sanitized frequently throughout the day. For a touchless check-in experience, download the Fly Delta app.
- 3** Hand sanitizer dispensers have been added near high-traffic and high-touch locations throughout the airport.
- 4** For everyone's safety, all of our customer-facing employees will have their temperature checked before reporting to work. They will also be on hand to help guide you through new safety procedures and answer any questions you have.
- 5** All of our employees wear masks or face coverings.
- 6** Check-in counters are being wiped down and sanitized frequently throughout the day.
- 7** Plexiglass shields are being added at all Delta counters that are staffed with an agent throughout the airport and will be in place systemwide by the end of May.
- 8** Baggage stations, where checked bags are located before they are loaded on the aircraft, are being wiped down and sanitized throughout the day.
- 9** Floor decals are being added to provide guidance for maintaining a safe distance while in line.

Security Checkpoint

To continue to provide a safe experience through security, multiple efforts have been implemented at TSA checkpoints.



- 1 Bins are being wiped down and sanitized frequently throughout the day.
- 2 Customers and TSA employees are required to wear masks or face coverings at TSA checkpoints.
- 3 To promote a safe distance, alternating lanes are being used when available.
- 4 Hand sanitizer stations have been placed near exits.

At the Gate & Boarding

Clean surfaces and safe distancing are our key priorities at the gate and during boarding. To give you more space, clean surfaces and reduce contact with other customers, we've updated our procedures to deliver on that commitment.



- 1 **Electrostatic spraying** with high-grade disinfectant is used to **sanitize our gate areas and jet bridges** overnight; the sprayers disperse the disinfectant in a fine mist which clings to surfaces throughout the entire area.
- 2 **All customers must wear a mask** or face covering, and extra masks and **wellness kits will be available** at the gate if you need one.
- 3 Cleaning supplies have been added at the counter for **agents to spot clean** as they see fit.
- 4 **Plexiglass shields** are being added at all Delta counters throughout the airport and will be in place systemwide by the end of May.
- 5 **Gate counters are being wiped down** frequently throughout the day.
- 6 **All of our employees wear masks** or face coverings.

- 7 **The Fly Delta app** can be used to scan your boarding pass for touchless boarding. App users will also be sent a notification that their aircraft has been sanitized and inspected before boarding.
- 8 To **minimize your contact with other customers**, boarding will occur **from back to front**, with those customers seated at the back of the aircraft boarding first, and **boarding has been limited to 10 customers at a time**.
- 9 **Jet bridges are being wiped down** and sanitized frequently throughout the day.
- 10 **Decals are being added** in jet bridges at all Delta-owned gates by June to promote safe distancing.
- 11 **Hand sanitizer dispensers** have been added near high-traffic and high-touch locations.

On the Plane

For your protection, we've raised the standard for cleanliness, created more space for you on board, and modified our service to reduce physical touchpoints.



- 1** An **extensive checklist** is followed to ensure everything meets our elevated standards. If an aircraft doesn't pass our spot check before you board, our teams can hold the flight and call back the cleaning crew.
- 2** **Electrostatic spraying** with high-grade disinfectant is used to **sanitize all of our aircraft** before every flight; the sprayers disperse the disinfectant in a fine mist throughout the entire cabin.
- 3** **Lavatories are cleaned** during flight and extensively cleaned and sanitized after every flight.
- 4** All **overhead bin handles are sanitized** before every flight.
- 5** All of our aircraft are **ventilated with fresh, outside air**, or air that is recirculated through high-grade **HEPA filters**, which extract more than 99.99% of particles, including viruses.
- 6** To give you more space, **select seats have been temporarily blocked across all cabins on all aircraft**, and the total number of customers per flight has been reduced.
- 7** All **blankets and bedding are laundered** after every flight and all Main Cabin pillows are disposed of after every use.
- 8** **Customers must wear masks or face coverings** throughout the entire duration of the flight, except during meal service.
- 9** All **armrests are thoroughly wiped down and sanitized** before every flight.
- 10** **All of our employees wear masks** or face coverings.
- 11** To allow for **greater space when deplaning**, flight attendants will cue you when to exit.

Details in Your Space

Your seat and space are most important, so we've implemented policies to keep it clean and safe, so you can fly with peace of mind knowing we've got you covered.



Wellness kit

- 1** Complimentary **wellness kits** with a face mask and sanitizing wipe will be available upon request. Amenity kits will also be available on all long-haul international flights.
- 2** All **tray tables** are **thoroughly wiped down and sanitized** before every flight.
- 3** **Sanitizing wipes and gel packs** are available on board for your use, and our crews are supplied with wipes to keep galleys, equipment, lavatories, and the flight deck clean.
- 4** **Seatback screens** and all surrounding surfaces are **thoroughly wiped down and sanitized** before every flight.
- 5** **All non-essential items**, such as Sky magazine and glassware, have been removed.
- 6** To **reduce service touchpoints**, food and beverage offerings have been pared down, but you are still welcome to bring TSA-compliant food on board.
- 7** **Snack bags**, including a beverage, snack and sanitizing wipe or gel, are being handed out on select flights at boarding to reduce onboard service touchpoints.

Baggage Claim

Our cleanliness measures don't stop when you exit the aircraft. We're focused on keeping surfaces clean and allowing for safer distancing at baggage claim, so you are protected all the way through your journey.



- 1** Counters at **Baggage Services Offices** are wiped down and sanitized throughout the day.
- 2** **Plexiglass shields** will be added to Baggage Service Offices systemwide by the end of May.
- 3** **Hand sanitizer stations** will be placed near baggage claim carousels at all domestic locations by June.
- 4** **Floor decals to promote safer distancing** will be added to **baggage claim carousels at all domestic locations** by June.
- 5** **Electrostatic spraying** with high-grade disinfectant will be used to **sanitize our baggage claim areas at all domestic locations** by June.



GENERATING DESTINATION DEMAND POST-COVID 19: PUERTO RICO

Leah Chandler, CDME, Chief Marketing Officer,
Discover Puerto Rico

Objective: Manage the disruption lifecycle effectively and mitigate the impact on tourism by steering a rapid recovery plan.

PHASES:



IMPACT

Days



REGROUP

Weeks



REBOUND

Month(s)



NEW NORMAL

Sustain

DRIVERS, DIRECTION, TACTICS:

IMPACT

DRIVERS:

- First case/local transmissions.
- Government/institution announcements.
- Dramatic occupancy losses through cancellation and postponement.

DIRECTION:

- Proactively share measures preliminarily put in place as a positive, to position the destination as leading by example. Clarify any potential inaccuracies with travelers, media, meeting planners and travel advisors.

TACTICS:

- Adapt and enact the pre-planned "airborne illness" scenario from our robust crisis playbook to take preventative action ahead of time.
- Develop and continuously update media and group statements, traveler FAQ, industry communications, and other materials.
- Send frequent industry email blasts to inform of latest measures in place and revised messaging.
- Update travel advisory & traveler FAQ daily on the website with important information for travelers.
- Pause paid media while strict travel restrictions are in place but remain active on social media with change in tone.
- Pivot to digital engagement of meeting planners and travel advisors.

REGROUP

DRIVERS:

- Ongoing containment and risk aversion.
- Strict quarantine, curfew and lockdown measures in place.

DIRECTION:

- Responsibly deliver messaging and smart activations that allude to the current, global circumstances and local mandates but keeps Puerto Rico top of mind.
- Position Puerto Rico as a leader in containment and forthcoming recovery due to early implementation of strict guidelines and mandates for locals and current on-island visitors.

TACTICS:

- Activate top-line perception testing in the US to guide planning.
- Activate proactive newsworthy content ideas that encourage travelers to dream about, plan and (at the right time) book travel to our island.
- Continue robust earned media relations positioning Puerto Rico as an emerging leader in recovery.
- Continue updating media and group statements, traveler FAQ, industry communications, and other materials.
- Continue sending industry email blasts to inform of latest measures in place and messaging.
- Continue updating website travel advisory & traveler FAQ.
- Maintain low levels of SEM for those actively seeking information, and stay active on social with proper tone, promoting posts where appropriate.
- Work with Puerto Rico recovery taskforce to synergize plans.
- Monitor changing need periods directly with hotel partners.
- Establish guidelines and targets for group and leisure promotions.

REBOUND

DRIVERS:

- Cases falling.
- Travel advisories loosening.

DIRECTION:

- Utilize research to guide marketing efforts and timing and drive immediate travel message.

TACTICS:

- Implement robust media and communications strategy, already developed, and scalable based on available funds.
- Inject additional funds across the entire marketing mix to make a significant impact and broadcast Puerto Rico's readiness for leisure and business visitors.
- Utilize earned media to position Puerto Rico as significantly advanced in terms of readiness compared to competitive set, based on strict containment measures implemented much earlier than other destinations.
- Amplify Puerto Rico's "readiness" in relation to past examples of resiliency and strong comebacks despite past challenges.
- Activate new creative campaign that builds on consumers' pent up demand for travel.
- Implement robust FAM plans (already established) to bring top-tier journalists, meeting planners, and travel advisors to the island to amplify our "readiness" message.
- Activate destination promotions in both leisure and group segments.
- Implement meetings media plan to deliver promotions to appropriate targets.

NEW NORMAL

DRIVERS:

- No new cases over double quarantine period.
- "Non-essential" travel OK.

DIRECTION:

- Incorporate new best practices / travel changes in all marketing efforts.

TACTICS:

- To be developed in the coming weeks as we monitor the COVID-19 crisis/situation.
- Inject additional funds across the entire marketing mix to make a significant impact and broadcast Puerto Rico's readiness for leisure and business visitors.
- Reengage face to face sales interaction, road shows, tradeshows and events.

COVID-19 ACTION PLAN (CAP)

Objective: Manage the disruption lifecycle and mitigate the impact on tourism by steering a rapid recovery plan.

1. Still in Phase II: Regroup
2. Phase III requires:
 - a) Travel restrictions on-island begin to loosen
 - b) Critical mass of tourism-related businesses are open (lodging, attractions, restaurants, etc.)



DRIVING DEMAND MESSAGING

“ALL IN GOOD TIME” | Video :30

VISUAL: time lapse of the sun rising over a Puerto Rican seascape.



Right now, it's time to stay home.

But soon enough, it'll be time to soak up the sun. Right now, it's all about warm wishes.

Soon enough, it'll be back to warm welcomes. Right now, we're just focused on bare essentials.

Soon enough, we'll be able to treat ourselves to simple pleasures.

Right now, it's time for patience.

Soon enough, it'll be time for paradise.

TITLE: ALL IN GOOD TIME.



IT'S TIME TO ACKNOWLEDGE



TRAVEL HAS CHANGED FOREVER.



BUT ONE THING WILL NEVER CHANGE.



THERE'S NO PARADISE LIKE PUERTO RICO.



IT'S TIME FOR NEW WORLDS



WITH NO NEED FOR PASSPORTS.



IT'S TIME TO TAKE A TRIP



WHERE EVERYONE TAKES CARE OF YOU.



DISCOVER
Puerto Rico

DISCOVERPUERTORICO.COM/PROMISE

VISITOR HEALTH AND SAFETY GUIDELINES

- Developed by the Puerto Rico Tourism Company
- Alignment with US Travel Assn. guidelines
- Condensed & Consumer friendly
- Revising as restrictions evolve



VISITOR HEALTH & SAFETY GUIDELINES



Puerto Rico is committed to providing a safe travel experience. Recognizing the importance of hygiene and disinfection, the Island of Puerto Rico is applying locally enforced measures developed by the Puerto Rico Tourism Company (PRTC), alongside U.S. Travel Association (USTA) guidelines, to safeguard the wellbeing of guests and employees.

UPON ARRIVAL Airport



Arriving passengers may be asked to **self-quarantine for 14 days** no matter the symptoms. Visitors should check the latest travel advisory for more information.



The Puerto Rico National Guard is assisting with **health screenings of all arriving passengers**, including offering rapid COVID-19 testing.



An **Island-wide curfew** is in place through June 15 during the hours of **7:00PM - 5:00AM AST**, with exceptions for emergencies only.

GETTING AROUND Transportation



Certified transportation carriers will properly **disinfect vehicles** and have **hand sanitizer** available.



Drivers will **wear gloves** when handling doors and luggage. **Face coverings** will be mandatory for drivers and passengers.



Ride sharing options like Uber have released regulations that also mandate **face coverings** for drivers and passengers, with no front seat passengers permitted.

THINGS TO DO Visitor Experience

DINING

Restaurants are open with a **maximum occupancy of 25%** in their dining rooms, with temperature checks performed before entering; those with temperatures over 100.3 will be denied entry.

Employees will be required to use **face coverings** and **floor plans** will maintain distancing protocols.

Buffets, salad bars and self-serve options, as well as **reusable menus** are prohibited at restaurants inside hotels. **Gloves** are also mandatory for employees when serving guests.

ATTRACTIONS

Attractions remain closed, with the exception of outdoor recreation spaces including **public beaches, natural reserves, and golf courses** which are **limiting access** for exercise and non-contact sports only.

Shopping malls will enforce **social distancing** and **require appointments** to enter.

Hand sanitizing stations will be set up in targeted areas like entryways, elevator banks and high-traffic spots.

Cleaning and disinfection of surfaces will be augmented, while **employees will be screened daily** for symptoms.

CASINOS AND GAMING

When casinos reopen, there will be **wellness checkpoints at entryways** that will consist of temperature checks and hand sanitation.

Gaming stations (slot machines, chairs and tables) will be **properly cleaned and disinfected every hour**, after each guest, or upon guest request.

Social distancing will be strictly enforced and casino capacity reduced.

Face coverings by employees and guests will be required.

Gloves will be used by casino personnel and guests at gaming tables.

*Tourism businesses have an appointed Health & Safety Officer responsible for enforcing these measures.



DRIVING DEMAND EARNED MEDIA

EARNED MEDIA FOCUS

- Highlight the destination responsibly, amidst COVID-19 news clutter, to ensure audiences have Puerto Rico top of mind.
- Create unique content that will generate earned media coverage and online chatter as consumer mindset evolves.
- Utilize the DMO's experience with prior crises as a positive: how we're handling this crisis and preparing for an aggressive recovery.





DRIVING DEMAND PAID MEDIA

MEDIA TIMELINE

March		April	May	June
Media Live	Media Paused	Launched Phase 1	Continued Phase 1	Intro of Phase 2 TBD
<p>March 16th All Media Besides SEM Paused- COVID-19</p>		<p>April 9th Relaunched Social with Phase 1 messaging</p> <p>April 16th Launch with WeTransfer</p> <p>April 28th Launch with Lead Generation</p>		<p>Early June Launch with upper funnel awareness partners</p>



DRIVING DEMAND MICE

MEETINGS & CONVENTIONS

- Meeting clients where they are & finding new ways to connect
- Developing virtual site inspection format
- Aggressive webinar participation with strategic partners
- MICE-Specific Health & Safety Guidelines
- MICE-Specific creative campaign messaging



Toro Verde
Orocovis, Puerto Rico

DISCOVER
Puerto Rico
THANK YOU!



GENERATING DESTINATION DEMAND POST-COVID 19: ARUBA

Ronella Tjin Asjoe-Croes, Chief Executive Officer,
Aruba Tourism Authority

A close-up photograph of a hummingbird in flight, facing right. The bird has a long, dark beak and iridescent feathers. Its wings are spread, showing the intricate structure of the feathers. The background is a soft-focus green, suggesting foliage and yellow flowers.

Road to **RECOVERY**

ARUBA TOURISM AUTHORITY



Aruba Tourism
Authority

Destination Marketing and Management Organization

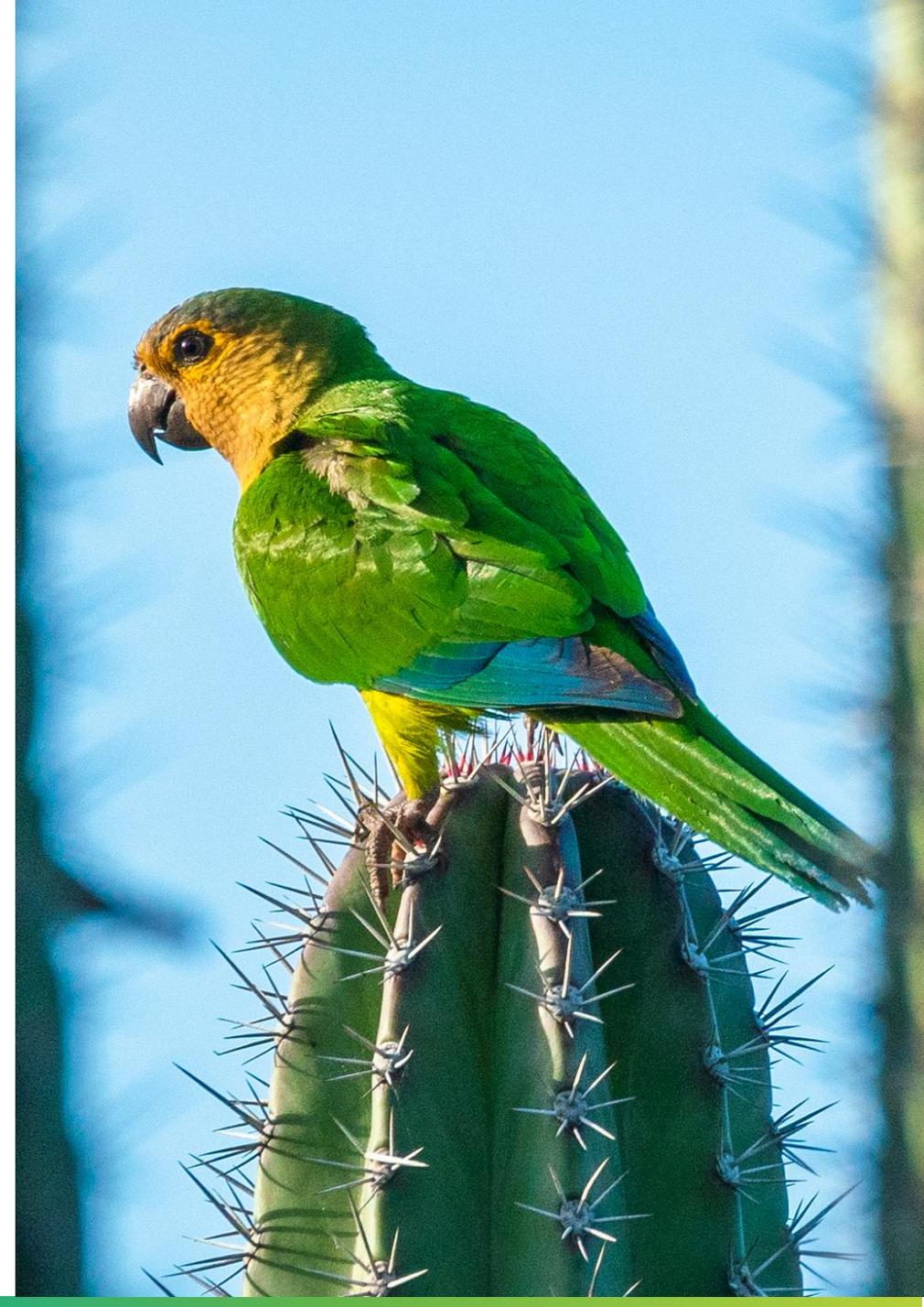


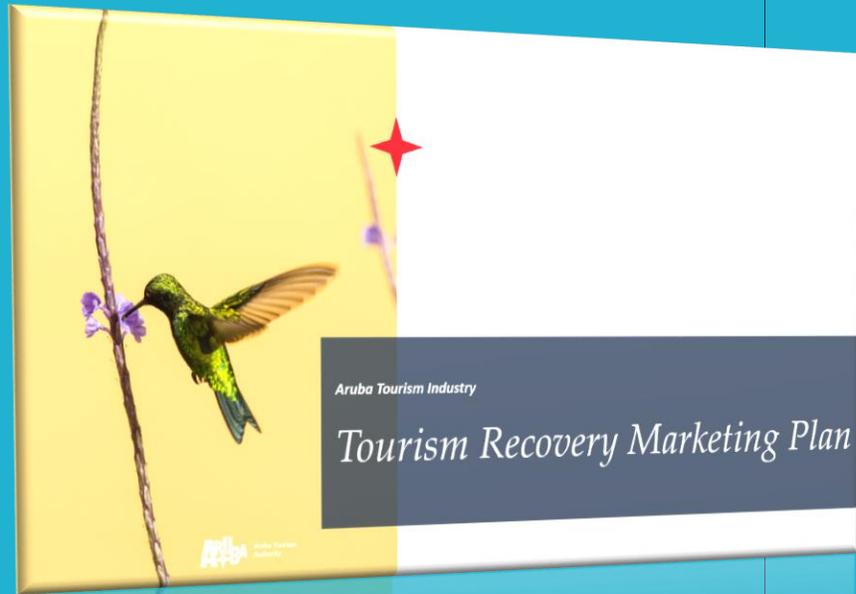
The role of the Aruba Tourism Authority (A.T.A.)

In response to the COVID-19 pandemic

Highlights...

1. The Aruba Tourism Authority (A.T.A.) forms part of the National Crisis Team and the Committee of Recovery and Innovation of Aruba.
2. In collaboration with key tourism partners, the A.T.A. produced a Tourism Recovery Marketing Plan (TRMP) as part of the island's Economic Recovery Track.
3. The A.T.A. leads the destination's crisis communication approach as well as the overall international marketing for the destination.
4. The A.T.A. developed the Health and Happiness Code Program (a dedicated sector-related guidelines and standards). This in partnership with the Department of Public Health (DVG) and Tourism Partners.





Aruba Tourism Authority in collaboration with
the Aruba Airport Authority N.V.,
the Aruba Hotel & Tourism Association &
the Aruba Timeshare Association

Recover Reinvent Revitalize

An aerial photograph of a tropical beach. The left side shows clear turquoise water meeting a wide, white sandy beach. On the right side of the beach, there is a dense arrangement of numerous thatched umbrellas, likely for shade. Further right, there are palm trees and other tropical vegetation. The overall scene is bright and sunny, with shadows cast by the umbrellas and trees.

Consumer Sentiment

One happy island ✦ ARUBA.COM

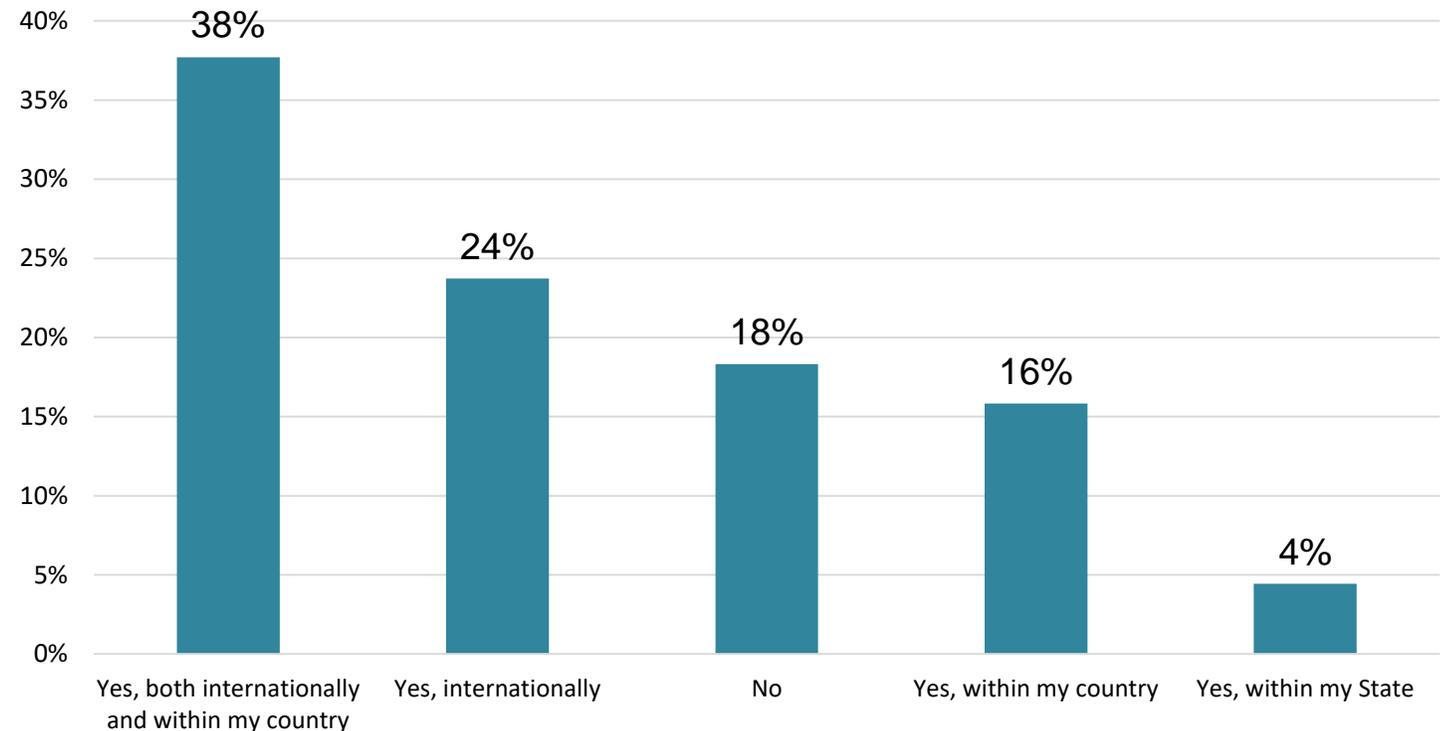
Initial Sentiment Results

May 14, 2020

Question: Are you considering traveling in the next six months?

62% are considering traveling in the next six months either 'internationally' and/or 'both internationally and within my country'.

Amount of Responses: 10,518



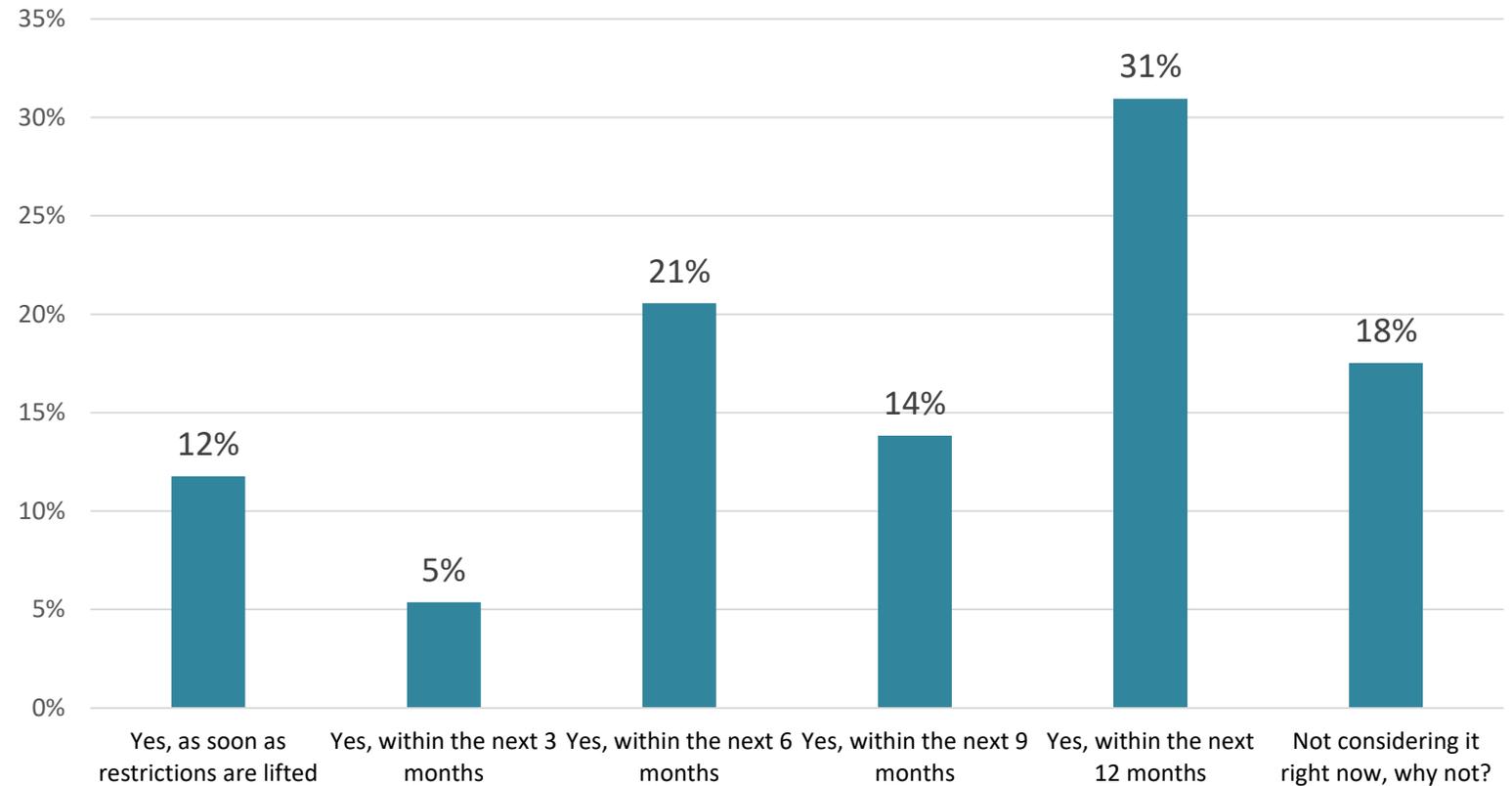
Initial Sentiment Results

May 14, 2020

Question: Are you considering traveling to Aruba?

17% are considering traveling to Aruba either as soon as the restrictions are lifted and/or within the next 3 months

Amount of Responses: 10,231





COVID-19 PROCESSES AND PROCEDURES

Pre- and Upon Arrival Protocols

For use in suspected COVID-19 cases among
passenger(s)

Accommodations Protocols

For use in suspected COVID-19 cases among
guest(s)

Business Sector Protocols

To elevate hygiene and health/ sanitation
protocols to a level our visitors and locals are
demanding as part of the new normal.

“What the caterpillar
calls the end of the
world the master calls
a butterfly”

-Richard Bach



Aruba Tourism
Authority





THANK YOU





**Q&A
SESSION**

An aerial photograph of a tropical bay. The water is a vibrant turquoise color, transitioning to a deeper blue further out. Numerous sailboats of various sizes are anchored in the bay. A white sandy beach curves along the left side of the bay, bordered by lush green vegetation. In the distance, a small island is visible under a bright blue sky with scattered white clouds.

THANKS!