

SAINT LUCIA TOURISM PERFORMANCE REPORT 2024



Saint Lucia Tourism Authority

PRESENTATION CONTENT

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STAY OVER ARRIVALS BY MONTH

Record
Breaking

7 Months
of the Year
were
Record
Breaking

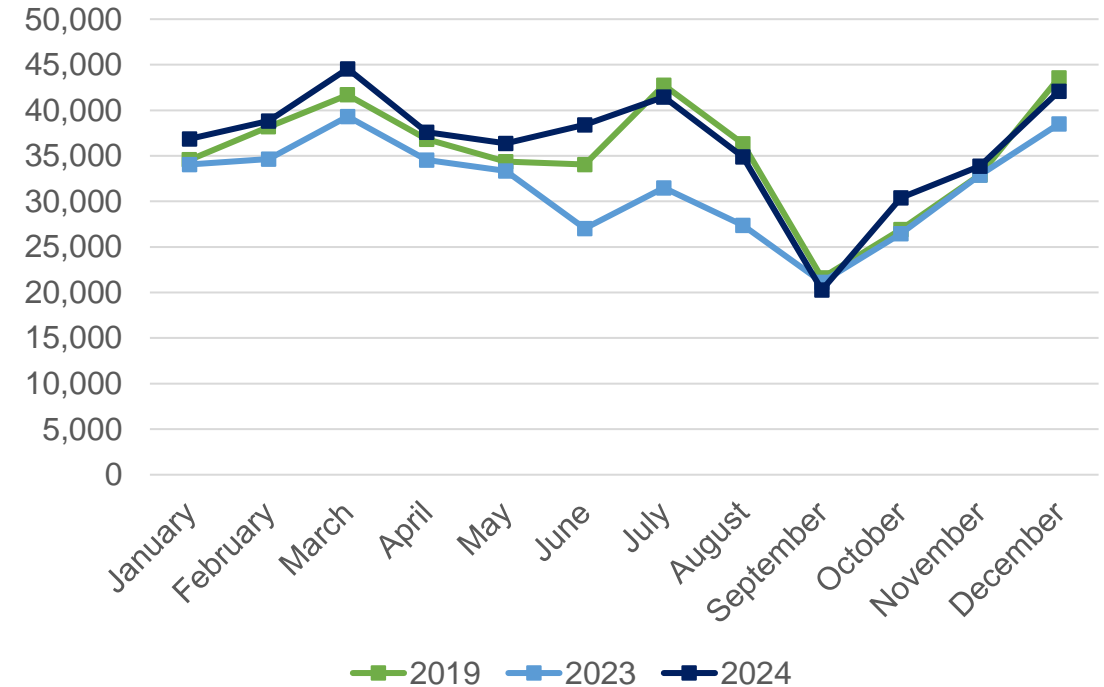
Best Year

Total of
435,659
Stayover
Visitors for
2024

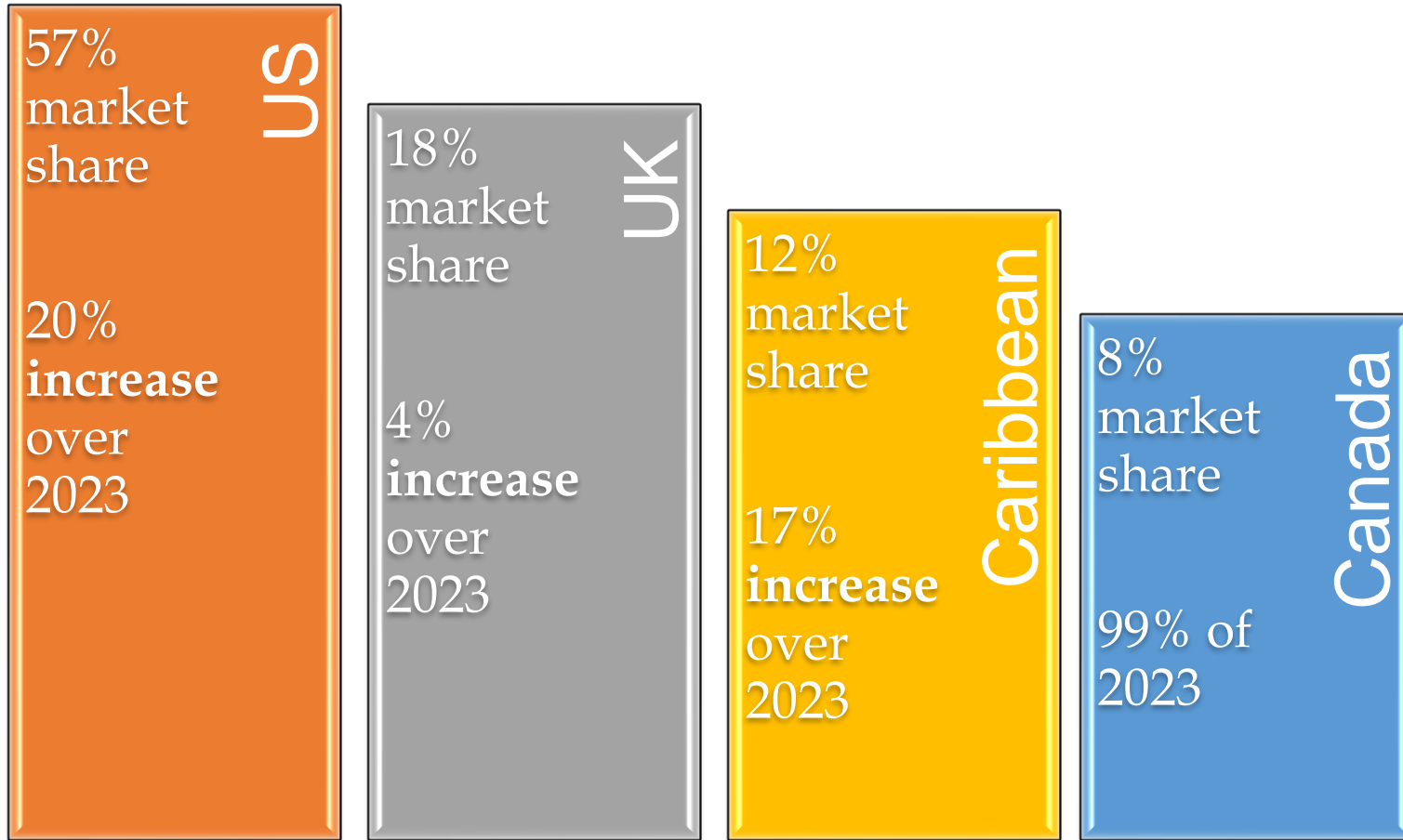
Results
Focused

Targeted
Marketing,
Increased
Airlift, Vibrant
Events and
Regional
Sports Meets

Stay Over Arrivals, by Month



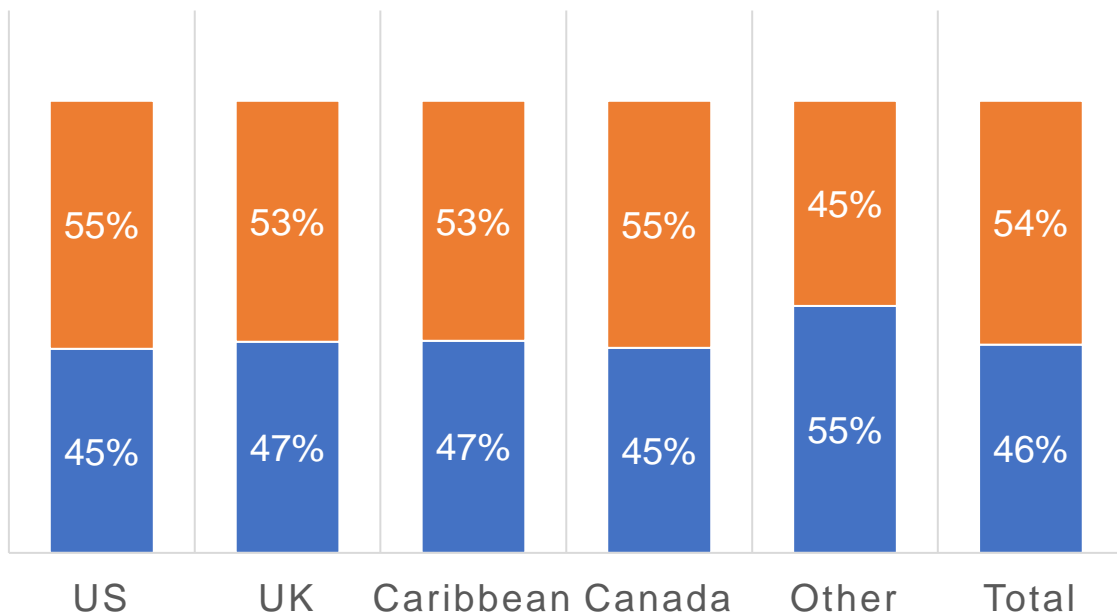
STAY OVER ARRIVALS BY MARKET



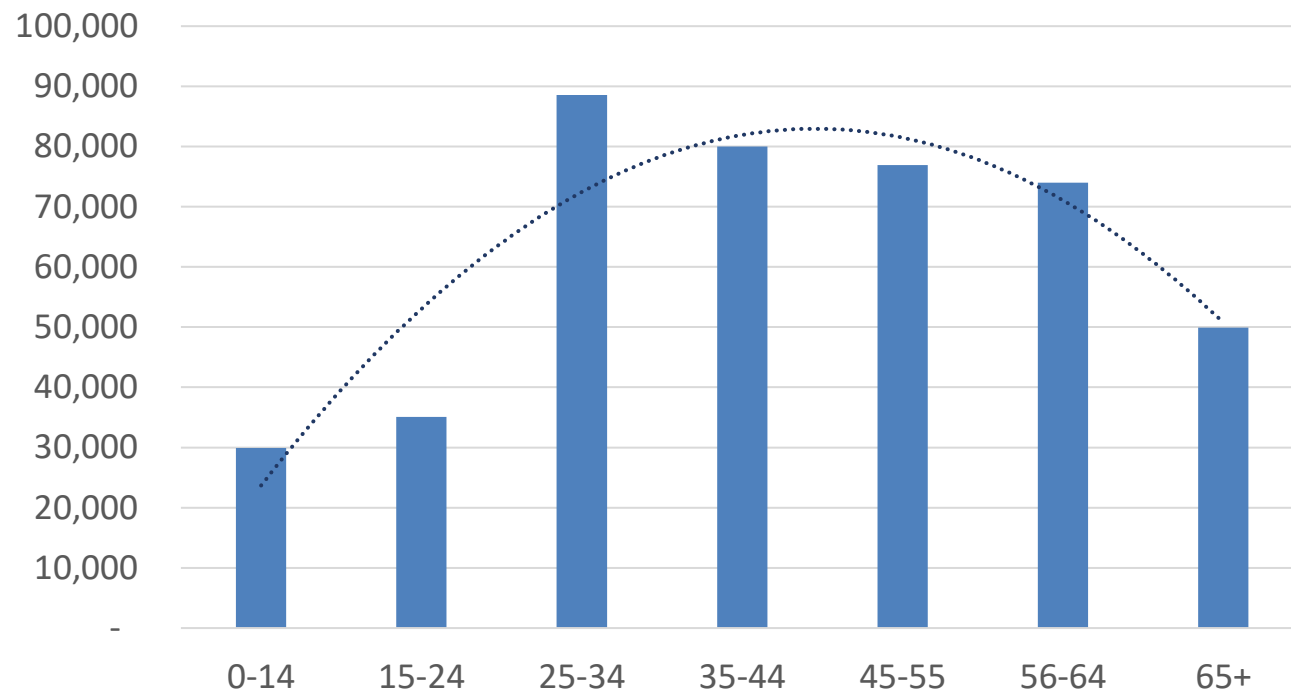
STAY OVER ARRIVAL PROFILE

GENDER BY MARKET

■ Male ■ Female

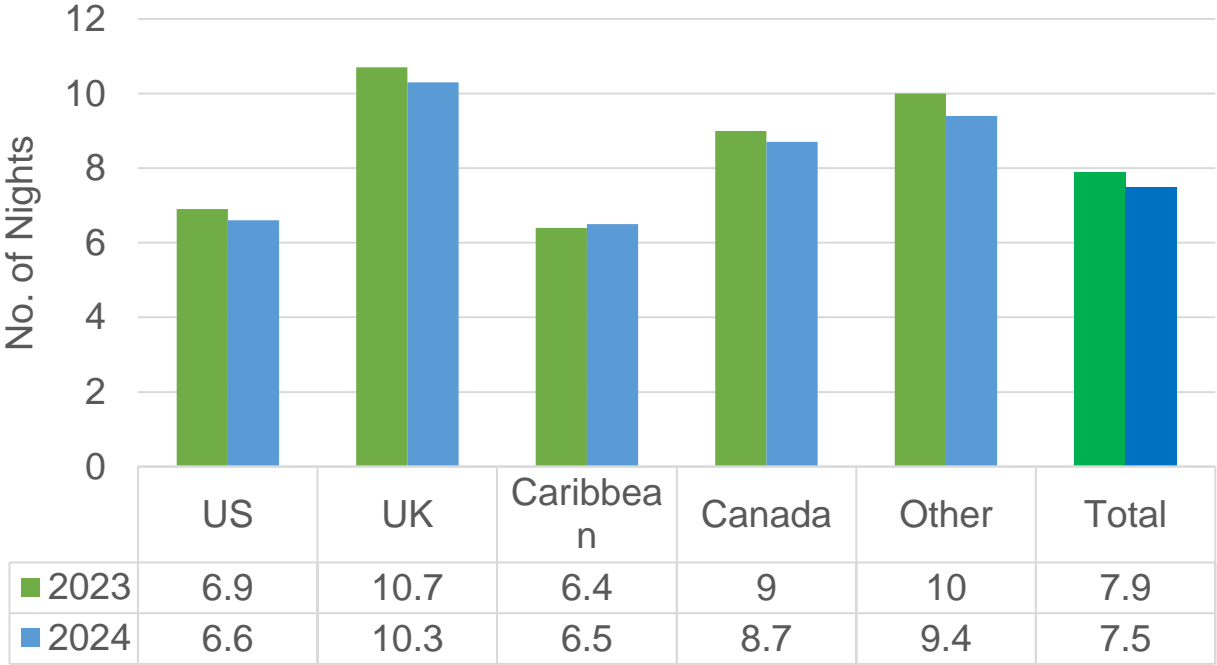


Visitor Breakdown, by Age

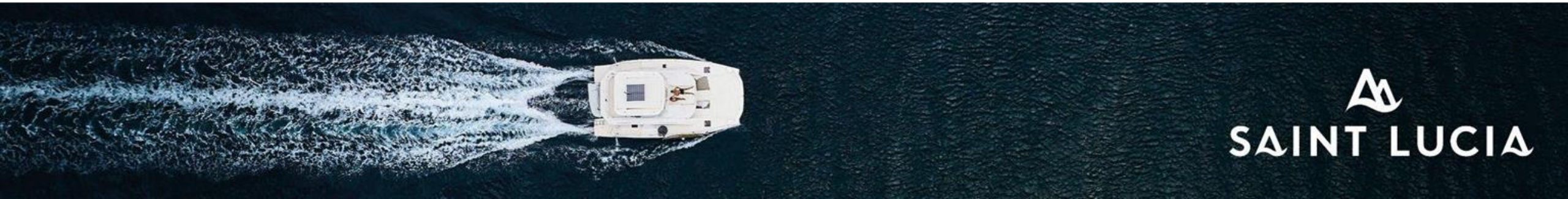
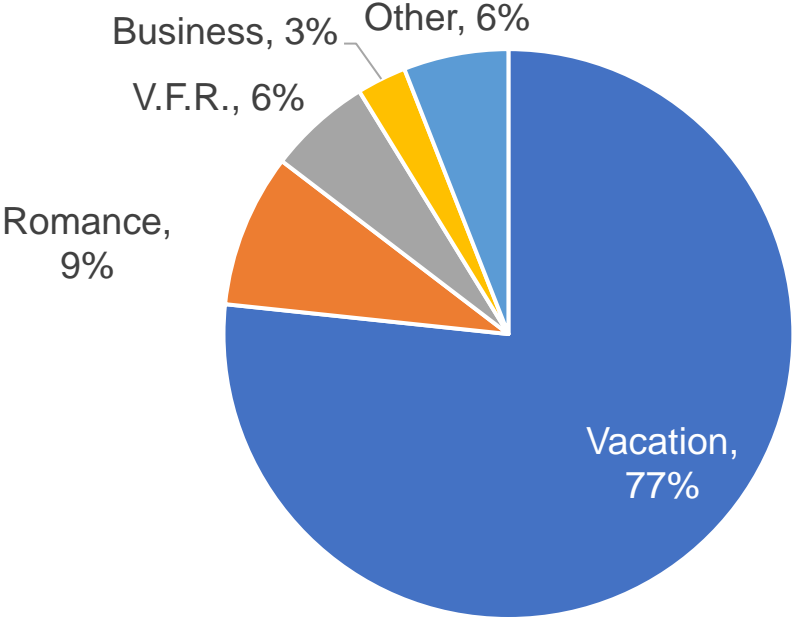


STAY OVER ARRIVAL PROFILE

Length of Stay, by Market



Purpose of Visit 2024



CRUISE ARRIVALS

Month	2019	2023	2024	Actual Change	Percent Change
January	127,541	115,183	123,393	8,210	7%
February	96,958	115,446	132,265	16,819	15%
March	129,060	129,750	133,211	3,461	3%
April	64,035	65,547	39,979	(25,568)	-39%
May	21,326	8,417	15,023	6,606	78%
June	19,715	0	10,732	10,732	100%
July	20,440	0	10,685	10,685	100%
August	22,662	0	9,170	9,170	100%
September	21,120	0	6,570	6,570	100%
October	37,857	3,893	22,807	18,914	486%
November	93,263	66,681	84,481	17,800	27%
December	132,766	110,063	135,193	25,130	23%
Total	786,743	614,980	723,509	108,529	18%

Month	2019	2023	2024	Actual Change	Percent Change
January	60	44	51	7	16%
February	51	51	57	6	12%
March	59	54	61	7	13%
April	32	29	21	(8)	-28%
May	9	3	11	8	267%
June	7	1	8	7	700%
July	10	0	4	4	100%
August	8	0	4	4	100%
September	7	0	3	3	100%
October	14	1	10	9	900%
November	46	32	42	10	31%
December	69	49	62	13	27%
Total	372	264	334	70	27%



YACHT ARRIVALS

ARRIVALS

Month	2019	2023	2024	Actual Change	Percent Change
January	7,367	5,323	5,313	-10	0%
February	7,944	4,706	4,627	-79	-2%
March	8,069	4,476	5,132	656	15%
April	5,193	3,617	3,453	-164	-5%
May	5,043	4,745	3,901	-844	-18%
June	3,492	1,728	2,032	304	18%
July	4,431	2,682	1,732	-950	-35%
August	5,174	2,346	3,559	1,213	52%
September	1,879	1,475	1,654	179	12%
October	2,400	1,693	1,919	226	13%
November	5,424	2,935	5,098	2,163	74%
December	9,803	4,569	4,533	-36	-1%
Total	66,219	40,295	42,953	2,694	7%

CALLS

Month	2019	2023	2024	Actual Change	Percent Change
January	1,109	1,027	1,110	83	8%
February	1,145	840	994	154	18%
March	1,227	797	999	202	25%
April	1,021	739	722	-17	-2%
May	744	772	705	-67	-9%
June	458	317	351	34	11%
July	597	392	264	-128	-33%
August	592	379	533	154	41%
September	288	239	256	17	7%
October	372	324	412	88	27%
November	753	561	742	181	32%
December	1,324	846	966	120	14%
Total	9,630	7,233	8,054	701	10%



AIRLIFT PERFORMANCE - USA

Source Market	Airline	Gateway	Frequency	Loads	Seat Change
USA	American Airlines	Miami (MIA)	Daily Yr round	85%	38%
		Charlotte (CLT)	5-7 x/week - yr round	89%	27%
		Philadelphia (PHL)	Weekly - Seasonal	82%	57%
		New York (JFK)	Weekly - Seasonal	84%	300%
	Delta	Atlanta (ATL)	Daily Yr round	85%	24%
	JetBlue	New York (JFK)	Daily Yr round	79%	21%
		Boston (BOS)	2x/week - Seasonal	80%	132%
	United Airlines	New Jersey (EWR)	Weekly (not Sep & Oct)	88%	-6%
		Chicago (ORD)	Weekly - Seasonal	82%	29%
Total USA				85%	29%



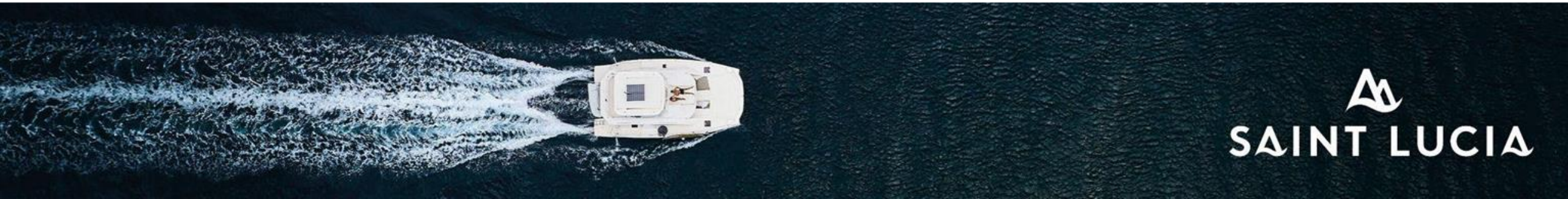
AIRLIFT PERFORMANCE - UK

Source Market	Airline	Gateway	Frequency	Loads	Seat Change
UK	British Airways	London (LGW)	Daily Yr round	50%	0%
	Virgin Atlantic	London (LHR)	3x/Week - Seasonal	55%	84%
	TUI	London (LGW)	Weekly - Yr round	89%	-7%
Total UK				55%	7%



AIRLIFT PERFORMANCE - CANADA

Source Market	Airline	Gateway	Frequency	Loads	Seat Change
CANADA	Air Canada	Toronto (YYZ)	2-5x/Week - Yr round	86%	-15%
	WestJet	Toronto (YYZ)	2-3x/Week - Yr round	64%	33%
TOTAL CANADA				77%	-3%



AIRLIFT PERFORMANCE - CARIBBEAN

Source Market	Airline	Gateway	Frequency	Loads	Seat Change
Caribbean	LIAT 2020	ANU, SVD, BGI	Not fixed	13%	-60%
	Caribbean Airlines	Trinidad (POS)	6x/Week - Yr round	78%	15%
		Barbados (BGI)	5x/Week - Yr round	52%	133%
	InterCaribbean Airways	DOM, BGI	2-4x Daily - Yr round	48%	42%
	Air Adelphi (Apr '24)	SVD	3x/Week - Yr round	29%	100%
	Sunrise Airways (May '24)	DOM, ANU, SVD, GND	2-4x Daily - Yr round	30%	100%
	Winair (Nov '24)	SXM, SVD	2x Weekly – Yr round	50%	100%
Total Caribbean				52%	20%




EXPENDITURE

Visitor Expenditure was up 24% by the end of the third quarter of 2024:

Q1



 US\$ 363,145,358


 19% increase over Q1 2023

 Double digit growth from the Canadian, Caribbean and UK markets.

Q2



 US\$ 312,350,528


 15% increase over Q2 2023

 Growth led by US, Other World and Caribbean markets.

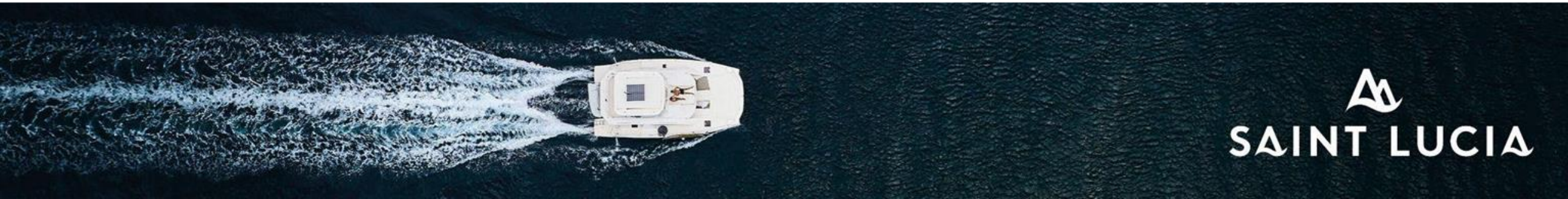
Q3



 US\$ 298,558,556

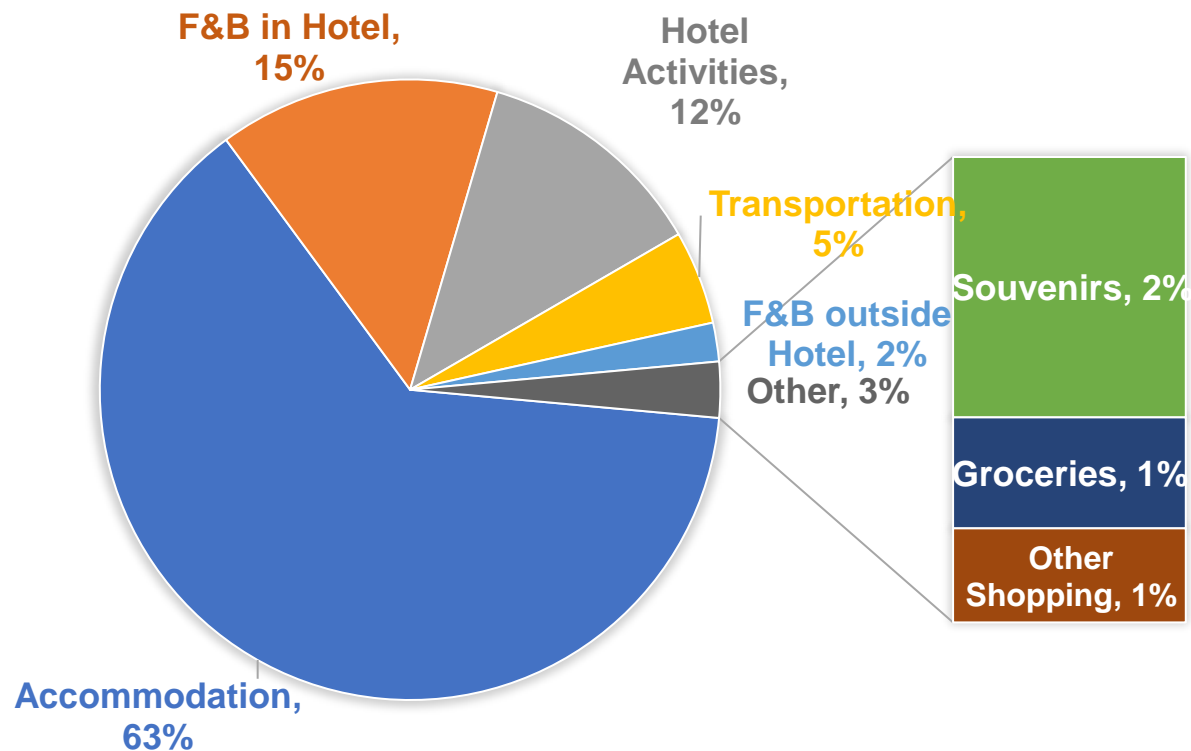
 44% increase over Q3 2023

 Growth led by US, Caribbean and Other World



EXPENDITURE BY ITEM

- The majority (90%) of total expenditure was spent on property (accommodation, food and beverage and other hotel activities).
- The 10% balance was spent on off-property activities (transportation, food and beverage, souvenirs and groceries).



ARRIVAL PROJECTIONS

Based on the anticipated increase in airlift, more strategic marketing campaigns, increased room stock and steady market demand, especially from the US market, growth is expected from all sectors in 2025, over 2024:

Cruise	Stay Over	Yacht
<ul style="list-style-type: none">• 15%• 832,035• More port calls• Larger vessels• More passengers	<ul style="list-style-type: none">• 10%• 479,225• More airlift• Festivals & Events• Targeted marketing	<ul style="list-style-type: none">• 10%• 47,248• Improved security• More strategic maritime marketing



FORWARD KEYS REPORTS

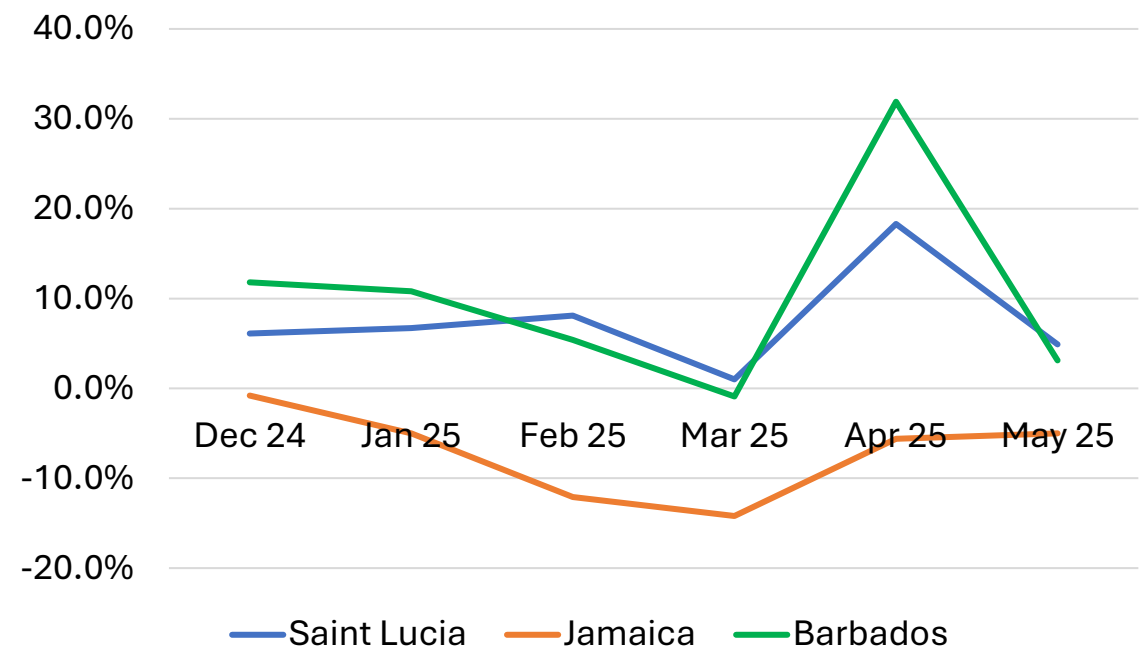
Future Arrivals by City, January - June 2025			
USA	Projection	UK	Projection
Indianapolis	46%	Belfast	82%
Chicago	28%	Aberdeen	71%
Atlanta	24%	Jersey	59%
Boston	17%	Newcastle	39%
Miami	16%	Edinburgh	38%
Charlotte	13%	Manchester	11%

Top Performing Caribbean Countries	
Caribbean	Projection
Curacao	17%
St. Maarten	16%
Puerto Rico	13%
Cayman Islands	8%
Guadeloupe	7%
Saint Lucia	6%



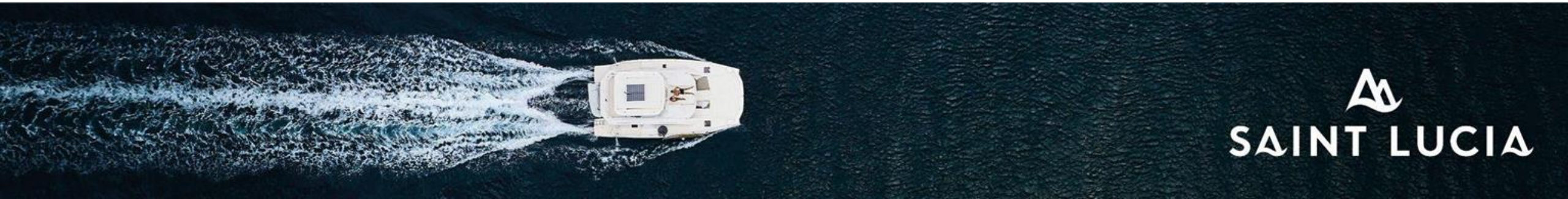
FORWARD KEYS REPORTS

Future Bookings vs Competition



Distribution Channels of Tickets Purchased to Saint Lucia

Channel	2023	2024	YOY	Share 2023	Share 2024
Direct	18,362	21445	16.8%	67.2%	68.8%
Retail TA	6,710	6,927	3.2%	24.6%	22.2%
Online TA	1,872	2366	26.4%	6.9%	7.6%
Corporate TA	367	436	18.8%	1.3%	1.4%



Reimagining Tourism in Saint Lucia

Targets to Marketing Saint Lucia



Protecting the Airlift by marketing behind the gateways



Reimagined Social Media Approach as the arrowhead of digital marketing



Incorporation of Culture and Heritage into marketing strategy



35% increase in Stayover Visitors in 3 years

60% increase in Visitor Expenditure

90% Cruise Passengers in 3 years

Disembarkation ratio

1 million Cruise Passengers in 3 years



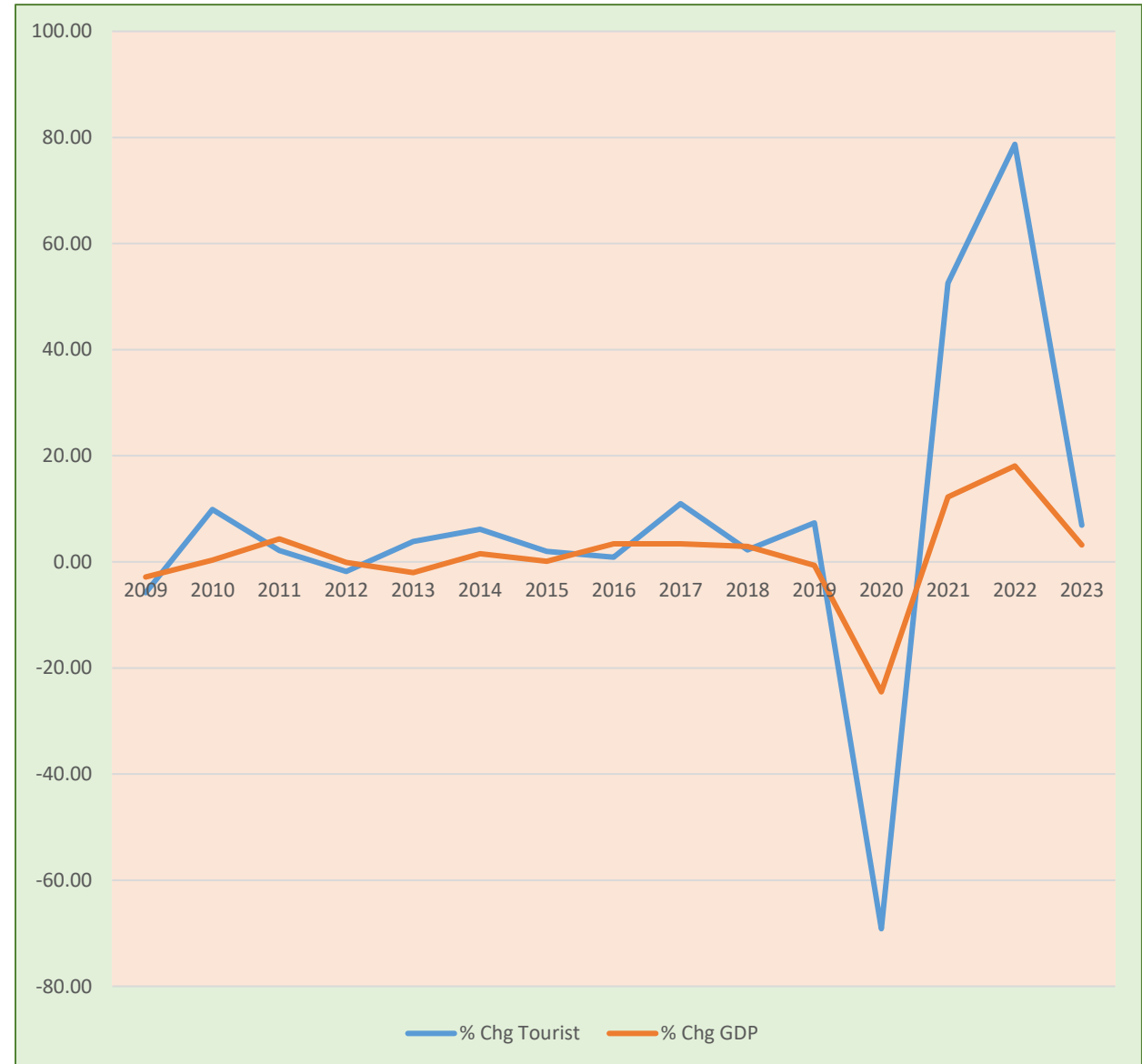


THANK YOU AND QUESTIONS



SAINT LUCIA
LET HER INSPIRE YOU

% Change in Visitor Arrivals Vs % Change in GDP



SLTA Fiscal Projects



New Stlucia.org Website

- Development of modern user friendly website with AI capabilities/ app to increase engagement

Destination Rebrand Project (\$1M Grant)

- Travel Saint Lucia – To cover the Caribbean
- Sustainable procurement practices (Merchandising).
- Procurement of digital assets - photoshoot filling the Gaps

Project Canada - Identified as a growth market to further strengthen our arrival. Aggressive activations Strategy for greater in market presence. Building on partnerships with Trade & Airline partners, Toronto Raptors Partnership, Diaspora Engagement, French Connections in Montreal, Hosted Events, Film Festivals, In Market Representation

PR & Social Media Reimagine Strategy

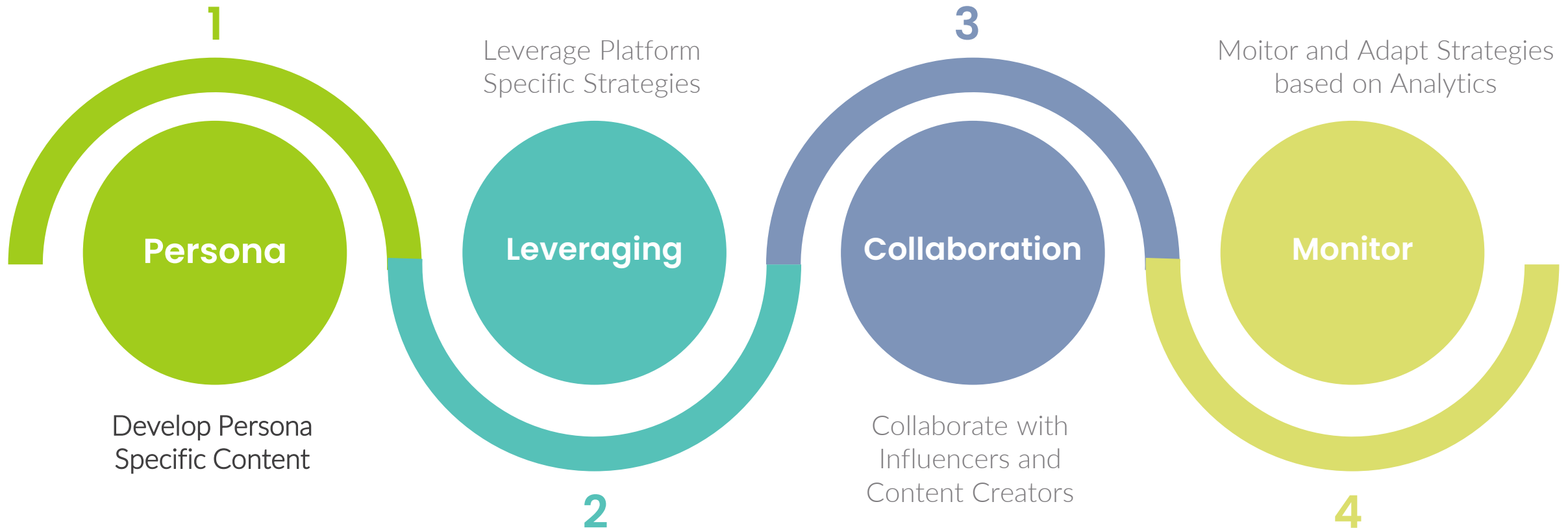
CTA Collaborations

- Reimagine Gros Islet Friday Street Party campaign
- Jounen Kweyol
- Kabaway Krawl

Digital Signage Display Screen - Capex

Social Media Strategy

Social Media as the arrowhead of Marketing



Persona Attractor

Transform Core Attractors into Persona for Strategy

