



DISCOVER
Puerto Rico

**Sales & Revenue
Advisory Committee &
PRCC Citywide
Partners Meeting**

MAY 31, 2023

Agenda

- 01 CALL TO ORDER & INTRODUCTION
- 02 SRAC COMMITTEE LEADER
- 03 SALES OVERVIEW
- 04 U.S. TRAVEL PRESENTATION
- 05 GROUP MARKETING UPDATE

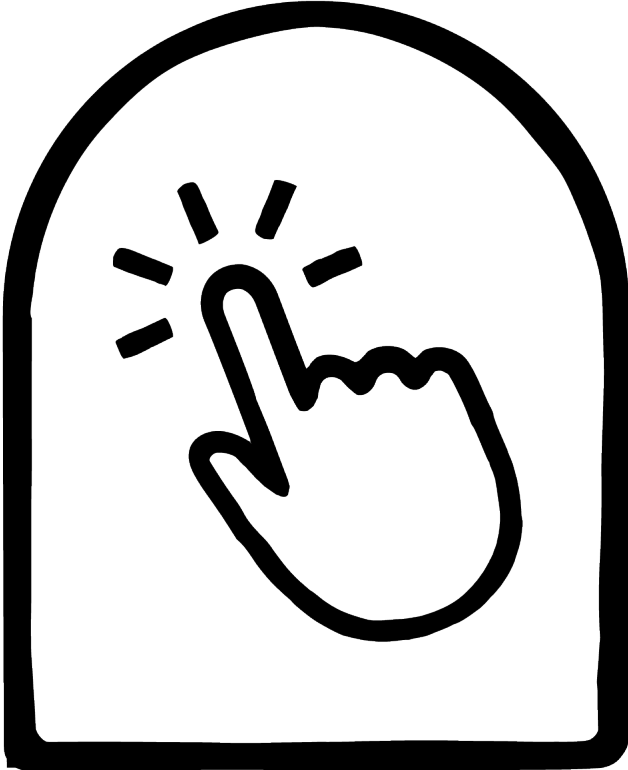
Agenda

- 06 LEISURE ACTIVITY REPORT
- 07 GROUP SALES PERFORMANCE
- 08 PRCC SALES PERFORMANCE
- 09 CLOSING REMARKS
- RECEPTION

WI-FI INFORMATION

Sonesta Conference

PW: Sonesta2022





Call to Order & Introductions

ED CAREY
CHIEF SALES OFFICER



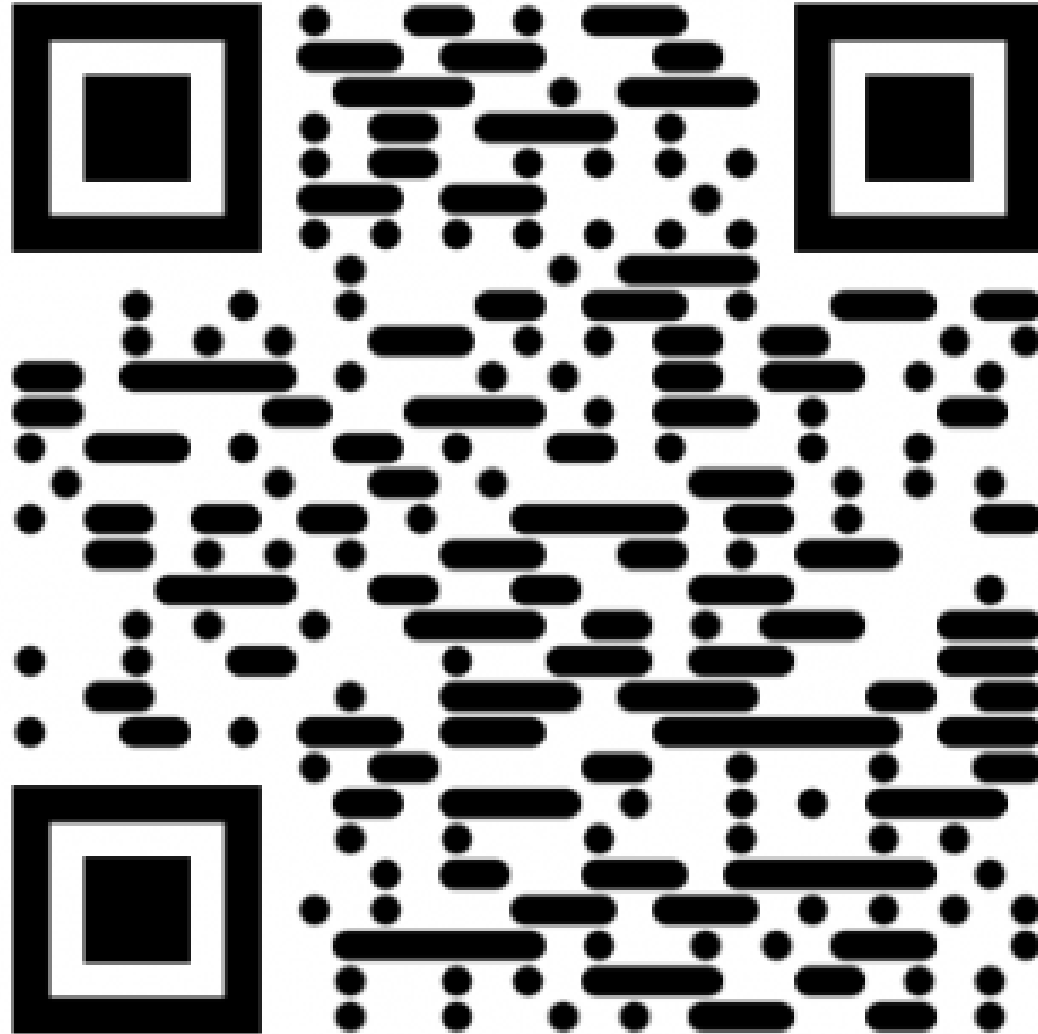
SRAC Committee Leader

Opening Comments

NEREIDA AMADOR
DIRECTOR OF SALES AND MARKETING, HYATT REGENCY GRAND RESERVE



POLL



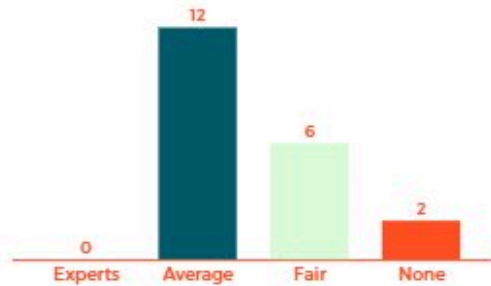
CODE

2831 6237

POLL

Go to [menti.com](https://www.menti.com) and use the code 2831 6237

While traveling, how would you rate the client's level of education of Puerto Rico?



20

LL

Account



Content



Design



Settings

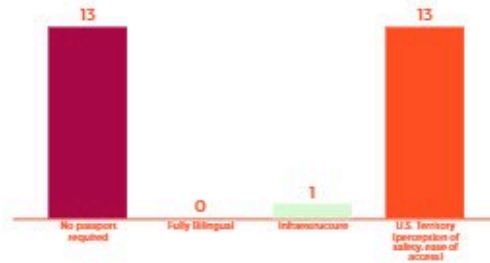


Got feedback?

POLL

Go to menti.com and use the code 2831 6237

What is the KPI that stands out the most when pitching the destination?



LL
Account

Content

Design

Settings

Got feedback?

Sales Overview

ED CAREY
CHIEF SALES OFFICER

LEADING ALL U.S. DESTINATIONS



TRAVEL SPENDING
(TOURISM ECONOMICS)

+38.5%

VS. 2019

-0.6%

U.S. AVERAGE VS. 2019



AIR PASSENGERS
(TSA)

+9.3%

VS. 2019

-10.2%

U.S. AVERAGE VS. 2019



HOTEL DEMAND
(STR)

+13.9%

VS 2019

-2.3%

U.S. AVERAGE VS. 2019



**SHORT-TERM
RENTAL DEMAND**
(AIRDNA)

+81.3%

VS 2019

+27.0%

U.S. AVERAGE VS. 2019

SUMMARY TABLES

U.S. AGGREGATE

Group demand benchmark: Annual

Group demand benchmark
(2019=100)

	2019	2020	2021	2022	2023	2024	2025	2026
--	------	------	------	------	------	------	------	------

Group demand benchmark (2019=100)

Baseline	100.0	31.4	44.0	82.5	85.1	89.8	96.5	100.8
Downside	100.0	31.4	44.0	82.5	79.9	79.6	89.3	94.2
% diff from Baseline	0.0%	0.0%	0.0%	0.0%	-6.2%	-11.4%	-7.5%	-6.5%

Growth from prior year

Baseline		-68.6%	40.2%	87.6%	3.2%	5.5%	7.5%	4.4%
Downside		-68.6%	40.2%	87.6%	-3.2%	-0.4%	12.2%	5.5%

Relative to 2019

Baseline	0.0%	-68.6%	-56.0%	-17.5%	-14.9%	-10.2%	-3.5%	0.8%
Downside	0.0%	-68.6%	-56.0%	-17.5%	-20.1%	-20.4%	-10.7%	-5.8%

Source: 2Synergize FuturePace; Tourism Economics

ON THE BOOKS

U.S. AGGREGATE

KEY RESULTS

Indicators

On the books relative to 2019

Room nights, in millions

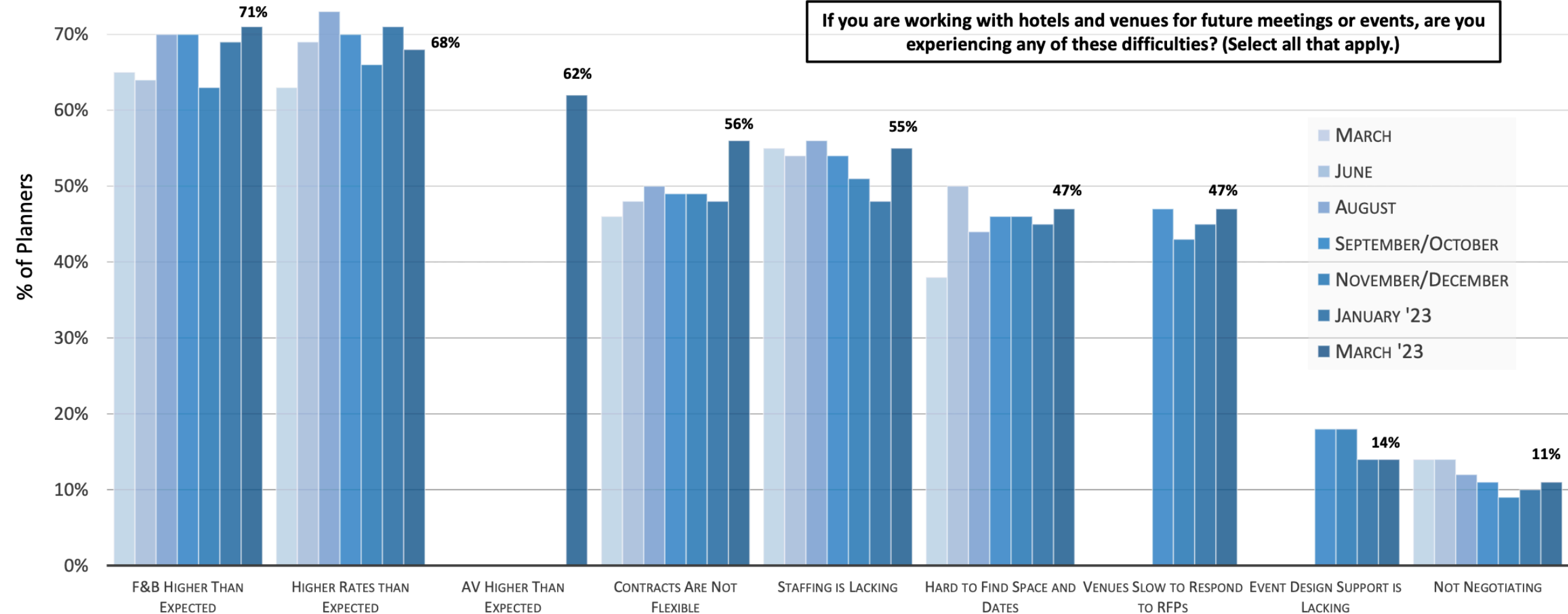


Source: SimpleView CRM (250+ DMOs)

- Room nights **currently on the books for 2023** are well below demand during 2019.
- As background, this is a comparison of events already on the books for dates in the future, as compared to actual events that occurred during 2019.

As Demand Grows in the Short-Term, So Do Difficulties

If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



FUTURE PACE TARGETS

VS. 2018, 2019, 2022

Variance ▼

Room Nights: Monthly Pace Target Variances

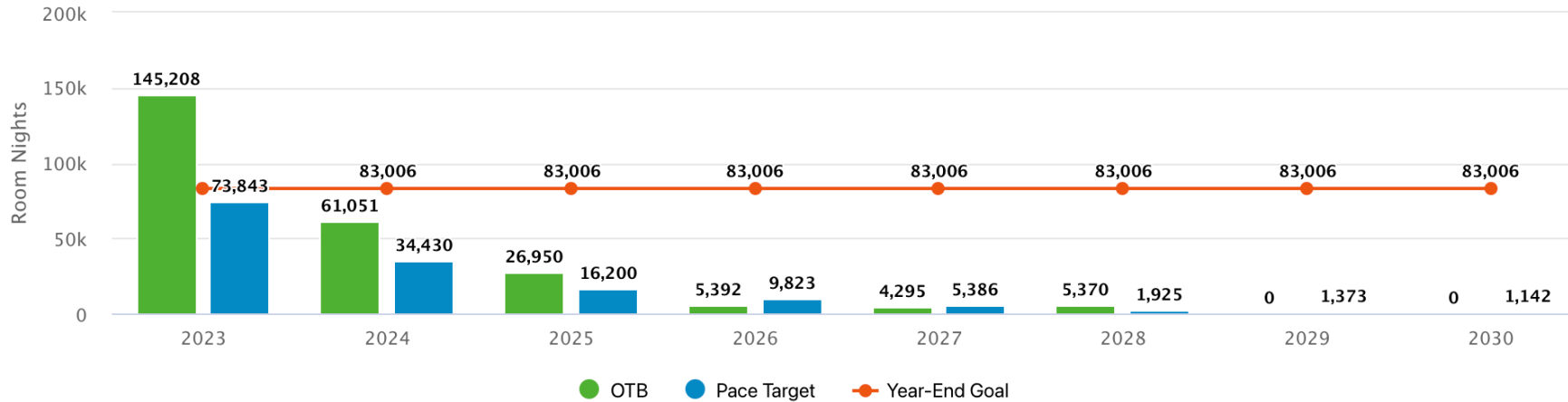
2023	19,805	6,051	11,231	4,997	3,757	13,360	693	3,662	2,120	440	4,044	1,205
2024	5,459	4,417	7,664	807	5,661	1,722	-763	-789	-488	1,374	895	662
2025	72	4,337	2,254	110	-1,498	-108	-714	-422	2,159	-1,314	5,126	747
2026	-1,517	-1,085	-177	-1,214	-1,087	-828	-427	-251	-149	1,987	-716	1,035
2027	-838	-592	-839	-627	563	-429	-217	-116	-71	-373	2,633	-186
2028	4,982	-231	-255	-216	-198	-135	-70	-43	-28	-145	-145	-72
2029	-192	-139	-203	-164	-152	-128	-66	-32	-21	-110	-110	-55
2030	-146	-106	-154	-131	-121	-102	-53	-32	-21	-110	-110	-55
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

- < -5,512
- From -5,512 to -3,937
- From -3,937 to -2,362
- From -2,362 to -787
- From -787 to 787
- From 787 to 2,362
- From 2,362 to 3,937
- From 3,937 to 5,512
- >= 5,512

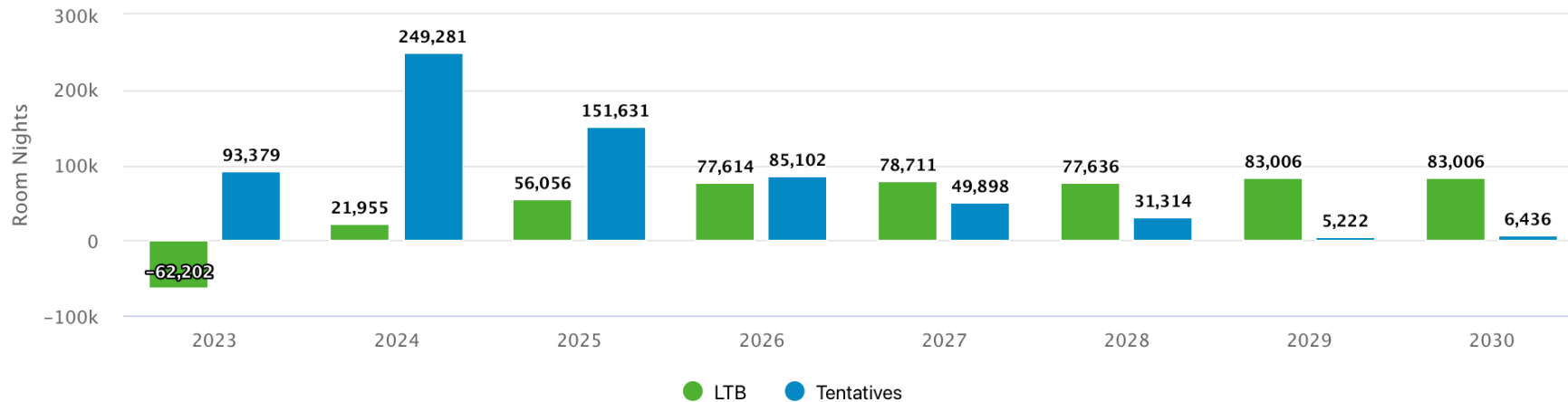
FUTURE PACE TARGETS

VS. 2018, 2019, 2022

Room Nights: OTB Vs Pace Target



Room Nights: LTB Vs Tentative



Market Recovery Summary (CSN)

Metro Area
Puerto Rico

Cancellation Flag
Exclude

Market Statistics (YTD)

366

RFPs 2019

191

RFPs 2021

412

RFPs 2022

483

RFPs 2023

52.19%

2021 vs 2019

112.57%

2022 vs 2019

131.97%

2023 vs 2019

117.23%

2023 vs 2022

Month	RFPs 2019	RFPs 2021	RFPs 2022	RFPs 2023	2021 vs 2019	2022 vs 2019	2023 vs 2019	2023 vs 2022
January	94	46	116	143	48.94%	123.40%	152.13%	123.28%
February	123	55	112	152	44.72%	91.06%	123.58%	135.71%
March	149	90	184	188	60.40%	123.49%	126.17%	102.17%
April	101	78	154	null	77.23%	152.48%	null	null
May	125	89	143	null	71.20%	114.40%	null	null
June	139	125	192	null	89.93%	138.13%	null	null
July	107	82	150	null	76.64%	140.19%	null	null
August	85	71	174	null	83.53%	204.71%	null	null
September	80	76	142	null	95.00%	177.50%	null	null
October	118	95	91	null	80.51%	77.12%	null	null
November	78	87	113	null	111.54%	144.87%	null	null
December	88	105	110	null	119.32%	125.00%	null	null

Top 10 Overlapping cities (2022)

Billing City	Metro Area	Overlap Index	Inverse Overlap
Nassau	Caribbean	36.84%	13.33%
Playa Del Carmel	Cancun/Yucatan	42.11%	7.22%
Grand Cayman	Caribbean	43.42%	23.92%
St. Thomas	Caribbean	28.95%	19.47%
Cancun	Cancun/Yucatan	34.21%	15.38%
Punta Cana	Caribbean	27.63%	10.45%
San Jose	Cabo San Lucas/Baja Cali	22.37%	3.21%
Cabo San Lucas	Cabo San Lucas/Baja Cali	19.74%	2.70%
Miami Beach	Miami	16.69%	9.43%
Scottsdale	Phoenix / Scottsdale	15.98%	3.95%

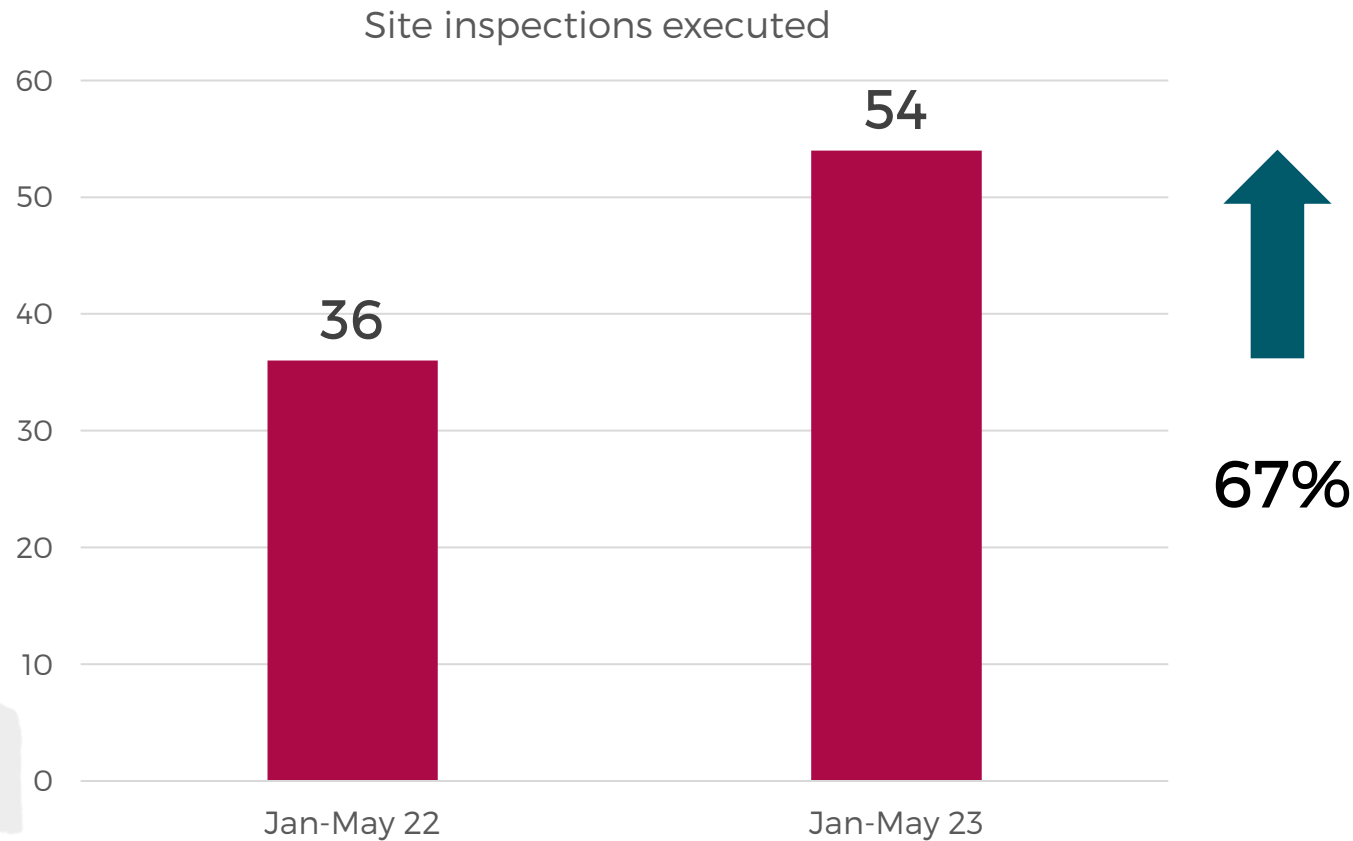
Top Lost Business Cities 2022

Billing City
Caribbean
Cancun/Yucatan Peninsula
Costa Rica
Punta Cana
Grand Cayman

**Prior Comp Cities Included: Palm Beach, Fort Lauderdale, Fort Myers, Puerto Vallarta*

SITE INSPECTIONS

JANUARY TO APRIL 2023



59k Room
Nights
+ 31K vs. 2022

LOOKING FORWARD

NEW STRATEGIC PARTNERSHIPS



"2023 is our highest operating year since 2015 with almost 13,000 room nights year to date coming to Puerto Rico".

- Halle Weinberg, General Manager, Destination Engagement



VIRTUAL REALITY

TELLING THE STORY OF THE CONVENTION DISTRICT AND BEYOND



ACCESS TO INFORMATION

- Industry Portal
- Bi-Weekly Research Update



WORK EMAIL ADDRESS *

MOBILE NUMBER *

Example format: +1 (787) 000-0000 or +1 (939) 000-0000

I'M INTERESTED IN ACCESSING DISCOVER PUERTO RICO'S CONTENT RELATED TO:

- | | |
|--|---|
| <input type="checkbox"/> Industry updates | <input type="checkbox"/> News |
| <input type="checkbox"/> Leads | <input type="checkbox"/> Photo/media assets |
| <input type="checkbox"/> Meeting minutes and notices | <input type="checkbox"/> Research |
| <input type="checkbox"/> Monthly reports | <input type="checkbox"/> Other |

SUBMIT ►



Research Update - May 17th, 2023

Through the first four months of the year, total lodging revenues have increased 19% over the same period a year ago and are 83% higher than the same time in 2019. Year-over-year demand has increased by 14% for hotels and rentals.

TARGETED HIGH-EXPOSURE EVENTS ON-ISLAND

PAST, UPCOMING AND PROPOSED

EVENT	MONTH	CONFIRMED
Caribbean Hotel & Tourism Association (CHTA)	October 2022	Confirmed ✓
Conference Direct CDX	November 2022	Confirmed ✓
American Society of Travel Advisors (ASTA)	May 2023	Confirmed ✓
Women in Travel Summit (WITS)	May 2023	Confirmed ✓
Prestige Global Meeting Source Annual	May 2023	Confirmed ✓
Destination Caribbean	August 2023	Confirmed ✓
Trade Show News Network Awards (TSNN)	October 2023	Confirmed ✓
International Gay & Lesbian Travel Association (IGLTA)	September 2023	Confirmed ✓
Society of American Travel Writers (SATW)	September 2023	Confirmed ✓
Travel Blog Exchange (TBEX)	July 2024	Pending
Society of Independent Show Organizers (SISO) Summer Conference	Summer 2024	Pending
U.S. Chamber Committee of 100	December 2024	Confirmed ✓

UPCOMING FY 2023 ROADSHOWS, TRADESHOWS & SPECIAL EVENTS

EVENT	SECTOR	TYPE	MONTH
2023 AMPs Golf Tournament	MICE	Event	May
2023 CSCAA Annual Meetings & Convention	MICE	Tradeshow	May
Sports ETA Facilities Summit	MICE	Tradeshow	May
Sports ETA Symposium 2023	MICE	Tradeshow	May
Southwest Roadshow – Magnolia Experience	MICE	Roadshow	May
GPS Southwest – Dallas	MICE	Roadshow	May
GPS Southwest – Houston	MICE	Roadshow	May
GPS Southwest – Austin	MICE	Roadshow	May
2023 Prestige Partner Conference	MICE	Tradeshow	May
Women Who Wine Spring 2023	MICE	Event	May

UPCOMING FY 2023 ROADSHOWS, TRADESHOWS & SPECIAL EVENTS

EVENT	SECTOR	TYPE	MONTH
IRF Invitational	MICE	Tradeshow	June
MPI World Education Congress	MICE	Tradeshow	June
GPS Northeast – Manhattan	MICE	Roadshow	June
GPS Northeast – Brooklyn	MICE	Roadshow	June
GPS Northeast – Long Island	MICE	Roadshow	June
FIEXPO Latin America	MICE	Tradeshow	June
Romance Travel Forum	MICE	Tradeshow	June
PCMA EduCon 2023	MICE	Tradeshow	June
GPS West – San Diego	MICE	Roadshow	June
GPS West – Orange County	MICE	Roadshow	June

UPCOMING FY 2023 ROADSHOWS, TRADESHOWS & SPECIAL EVENTS

EVENT	SECTOR	TYPE	MONTH
GPS West – Los Angeles	MICE	Roadshow	June
FICP Education Forum 2023	MICE	Tradeshow	June
SITE Midwest Smart Forum	MICE	Tradeshow	June
Small & Boutique Events	MICE	Tradeshow	July
Land X-Change 2023 MICE Conference	MICE	Tradeshow	July
SmartMeetings Northeast	MICE	Tradeshow	August
Smart Women Summit	MICE	Tradeshow	August
ASAE Annual Meeting & Exposition	MICE	Tradeshow	August
FICP Canadian Seminar	MICE	Tradeshow	August
Canadian Meeting Events Expo	MICE	Tradeshow	August

UPCOMING FY 2023 ROADSHOWS, TRADESHOWS & SPECIAL EVENTS

EVENT	SECTOR	TYPE	MONTH
SITE Classic	MICE	Tradeshow	August
Connect Marketplace	MICE	Tradeshow	August
SISO Summer Conference	MICE	Tradeshow	August



U.S. Travel Association

NAN MARCHAND BEAUVOIS
SR. VP, MEMBERSHIP AND INDUSTRY RELATIONS GENERAL MANAGER



U.S. TRAVEL
ASSOCIATION®

U.S. TRAVEL UPDATE

WITH **NAN MARCHAND BEAUVOIS**

WHO WE ARE

U.S. Travel Association represents **all components of the U.S. travel industry**—a key contributor to America's economic success. Our mission is to **increase travel to and within the United States**, and in doing so, fuel our nation's economy and future growth.



Travel accounts for

\$1.2 TRILLION

in direct spending—supporting nearly

15 MILLION

American workers.

WHAT CAN YOU DO IN 400 DAYS

while you're waiting for a visitor visa.



1 GO TO MARS... AND BACK

An astronaut in a white suit stands on the reddish surface of Mars, with a planet in the background.

2 HAVE A CHILD

A woman in a pink top is pregnant. Next to her, a woman in an orange top holds a baby. To the right, a young boy in a purple shirt looks on.

3 LEARN TO SPEAK ENGLISH

The Statue of Liberty stands next to a waving American flag. A speech bubble above her says 'Hello!'.

4 GO FROM VINE TO WINE

A vineyard with green leaves and purple grapes is shown next to two bottles of red wine.

5 EARN A DEGREE

A black graduation cap with a gold tassel.

6 SUMMIT THE TALLEST PEAKS

A map of mountain peaks with labels: KILIMANJARO, Tanzania; ACONCAGUA, Argentina; EVEREST, Nepal/China; DENALI, USA; ELBRUS, Russia; VIKINGEN MASSIF, Antarctica; and KOSCIUSZKO, Australia.

7 RAISE THE LOMBARDI TROPHY (TWICE)

A gold trophy with a cup and a base.

8 WALK AROUND THE WORLD, LEISURELY

Silhouettes of hikers with backpacks and trekking poles walking on a trail through a forest. The text '346 DAYS' is written at the bottom right.

9 GET A TECH UPGRADE OR TWO

A white smartphone with a notification bubble showing an envelope icon.

10 BECOME A (TELEVISION) MOVIE STAR

A black clapperboard with white text: 'PRODUCTION', 'TITLE', 'SCENE', 'TAKE', and 'ROLL'.



Last year, nearly
ONE-IN-FOUR
flights (23%) were delayed
or canceled.



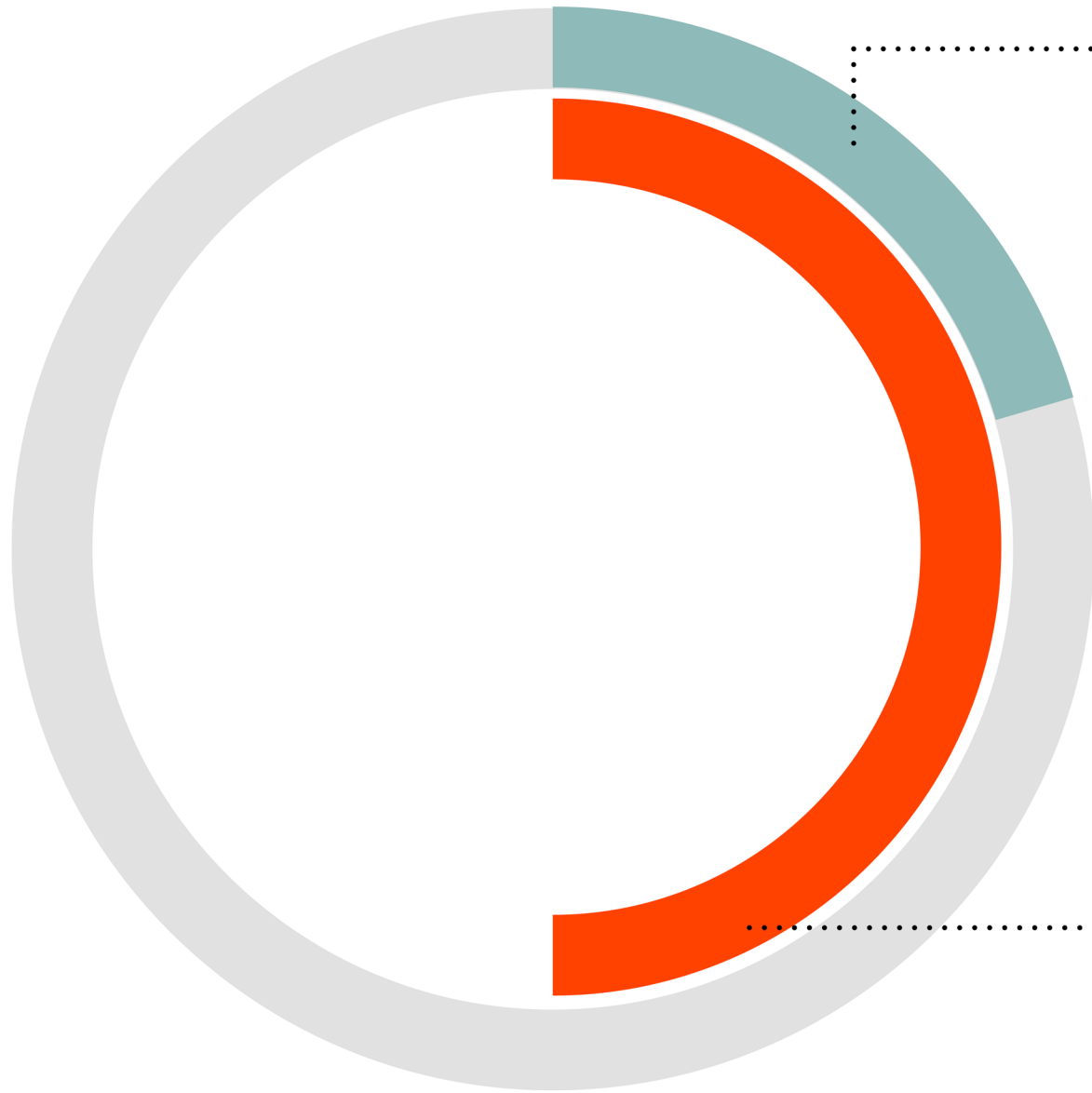
45%
OF AMERICANS
rate the air travel
experience as
sub-par





FAA Reauthorization Legislation Would Address:

- Staffing shortages
- Technology deficiencies



Despite making up **20% OF TOTAL TRIP VOLUME**, business travelers account for **40-60% OF LODGING & AIR REVENUE.**



MEETINGS
MEAN
BUSINESS

GLOBAL
MEETINGS
INDUSTRY DAY

MARCH 30, 2023 | 9:00AM - 5:00PM



MEETINGS & EVENTS ARE

essential

Meetings and events **GENERATED NEARLY \$100 BILLION**
in travel spending in the U.S. directly supporting
approximately **600,000 AMERICAN JOBS** (in 2022).



MORE THAN HALF

of meeting planners agree that the pandemic elevated the value of bringing people together.



U.S. TRAVEL ASSOCIATION®



Tell travel's
STORY Become an
AMBASSADOR

THINK BIG
about the future



Nan Marchand Beauvois

Senior Vice President, Membership and Industry Relations; General Manager, ESTO

THANK YOU

U.S. TRAVEL
ASSOCIATION®

DISCOVER
Puerto Rico



Group Marketing Update

JOSÉ ARANA
GROUP MARKETING DIRECTOR



STRATEGIC ALLIANCES FY 23-24

STARTING CONVERSATIONS ON PARTNERSHIP RENEWAL

- Current conversations
 - ASAE
 - MPI
 - PCMA
 - IAEE
 - SYTA
 - Connect
 - ConferenceDirect
- New Partnerships
 - LGBT Meeting Planner Association
 - National Council of Black Meeting Planners (NCBMP)
 - Fast Company



ASTA GLOBAL CONVENTION 2023

SUPPORTING OUR LEISURE SALES AND DESTINATION EXPERIENCE TEAMS



TRAVEL ADVISOR MONTH SOCIAL

ADVANCING AWARENESS FOR THE TRAVEL TRADE SEGMENT



Happy Travel Advisor Appreciation Month!

We continue to celebrate and congratulate you! As a travel advisor, your leadership and importance in shaping destinations worldwide are commendable. Your expertise and passion create unforgettable experiences for travelers, while positively impacting clients and communities. We appreciate your customized itineraries, deep understanding of destinations, and dedication to sustainable travel. We join you in celebrating Travel Advisor Appreciation Month, where we will continue to share inspiring stories and exclusive resources to support you.



IPW 2023

SUPPORTING OUR LEISURE SALES AND COMMUNICATIONS TEAMS



PHOTOSHOOTS

PUERTO RICO CONVENTION CENTER



PHOTOSHOOTS

PUERTO RICO CONVENTION DISTRICT AERIAL





DISCOVER

Puerto Rico

DiscoverPuertoRico.com

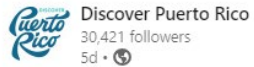
UPCOMING TRADESHOWS

MPI WORLD EDUCATION CONGRESS 2023



SOCIAL MEDIA

PLEASE CONTINUE TO SHARE WITH US FRESH CONTENT



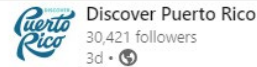
Discover Puerto Rico
30,421 followers
5d • 🌐

Your attendees will be surrounded by the best of both worlds at The St. Regis Bahía Beach Resort. 🌴 This luxurious resort is nestled between our lush national forest and the relaxing blue color of our ocean. Learn more: <https://fal.cn/3yd5I>.

#MakeYourMeetingBorica #DiscoverPuertoRico

📍: The St. Regis Bahía Beach Resort - Río Grande, Puerto Rico

#eventprofs #meetingprofs #meetingplanners

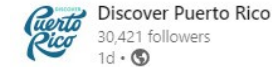


Discover Puerto Rico
30,421 followers
3d • 🌐

#MeetingPlanner! Check out this modern oasis in the city's ❤️, with 6,400 sq. ft. of indoor and outdoor space designed to offer stunning ocean views. Learn more about the **Condado Ocean Club** here: <https://fal.cn/3yeQI>.

#MakeYourMeetingBorica #DiscoverPuertoRico

📍: **Condado Ocean Club** - San Juan, Puerto Rico



Discover Puerto Rico
30,421 followers
1d • 🌐

#TravelAgents take care of booking everything you need for an unforgettable leisure experience in Puerto Rico. Which traditional Puerto Rican dish are you craving the most for your next visit? 🍴📍 Share in the comments! #LiveBorica

#DiscoverPuertoRico <https://fal.cn/3yiBu>



VR TOUR TOOL

DISCOVER PUERTO RICO TRAINING AND SOFT LAUNCH JUNE 1ST





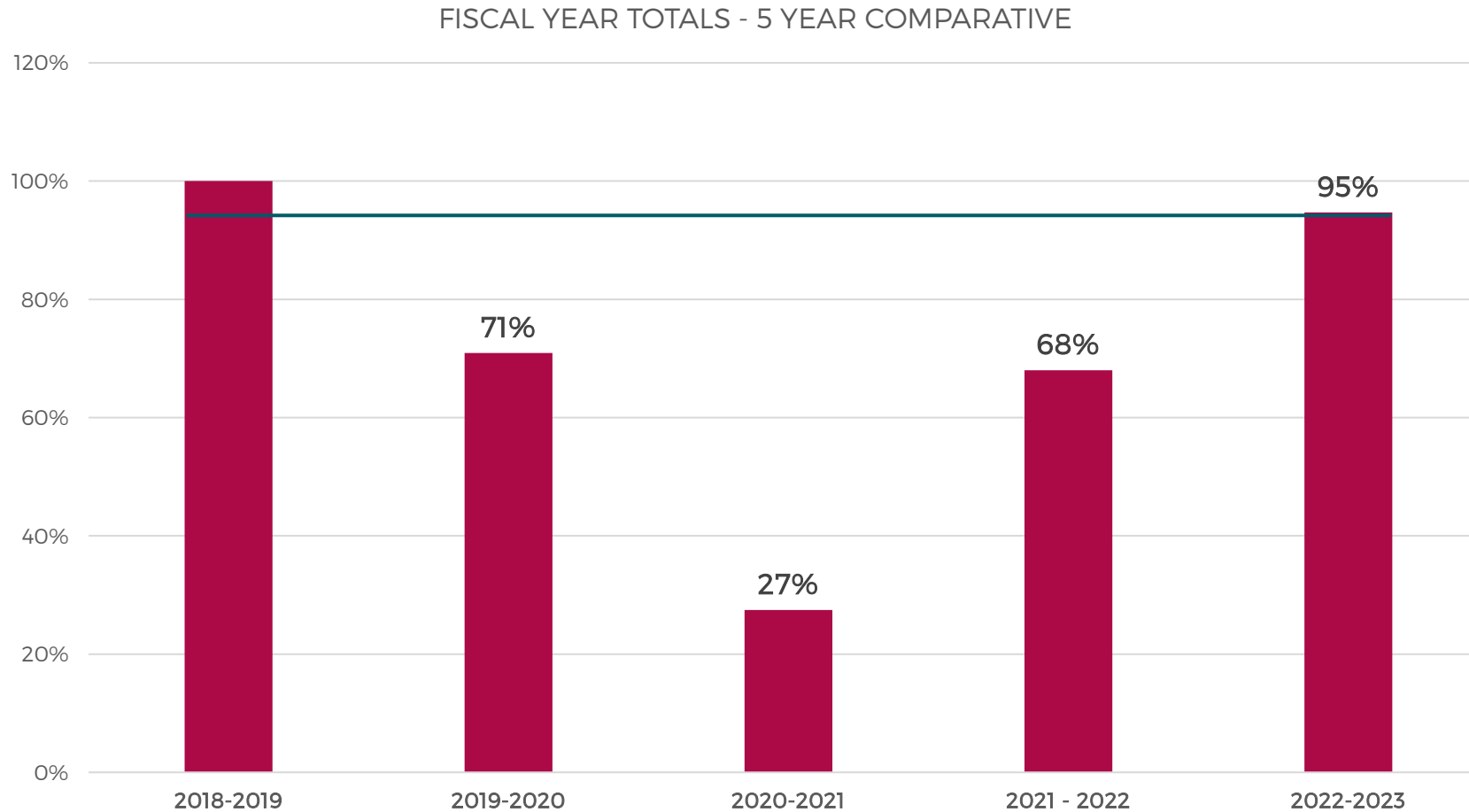
Leisure Sales Activity Report

JOHANNA GONZÁLEZ
LEISURE SALES MANAGER



BOOKING PACE FY 22-23

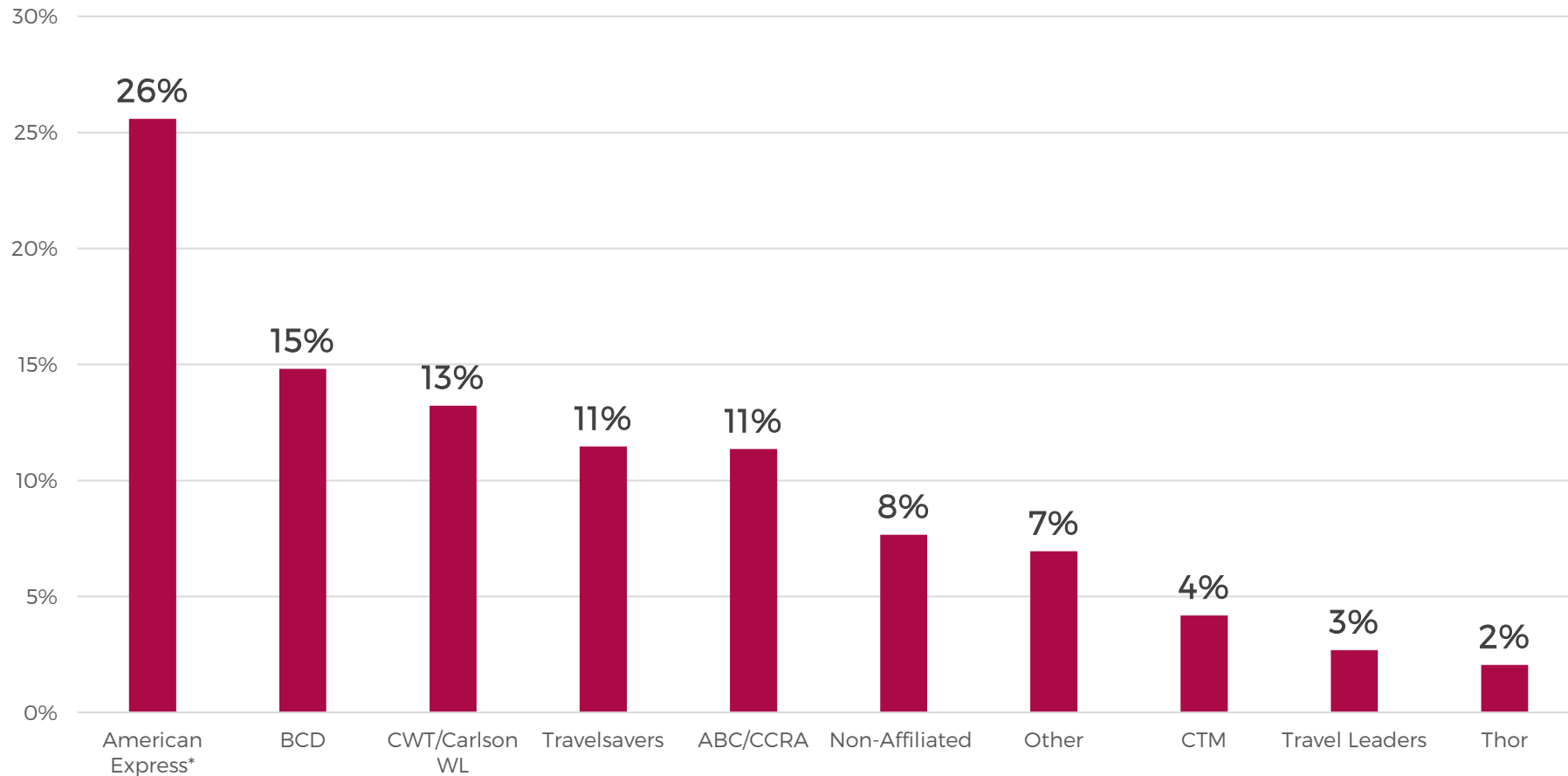
AS OF MARCH 24TH, 2023



CONSORTIA OVERVIEW

WHAT CONSORTIA DO YOU WORK WITH?

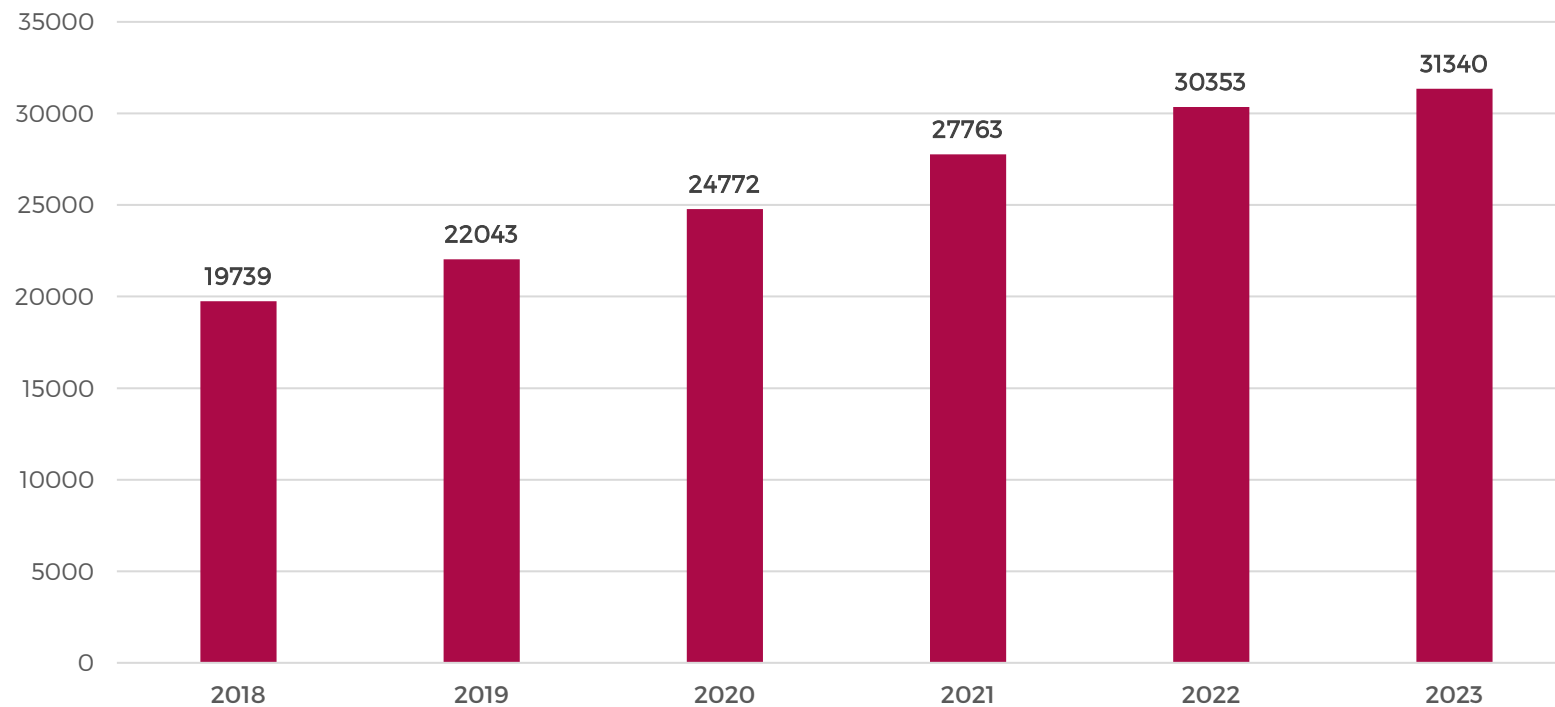
TOP CONSORTIA PERFORMANCE - GDS BOOKINGS



PRTE PARTICIPATION

CONTINUED GROWTH

Puerto Rico Travel Expert Program
Units 1 & 2 all time enrollments

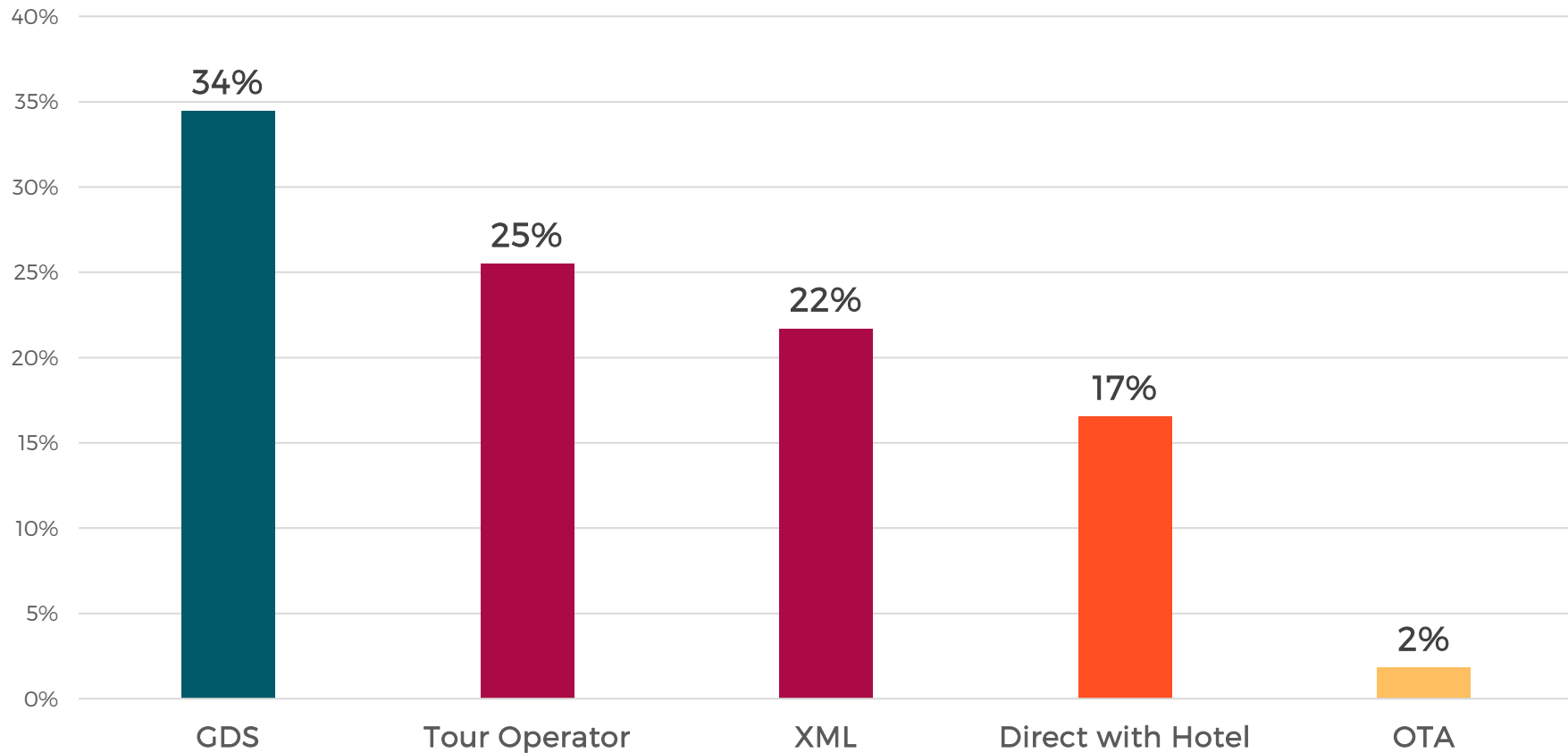


Enrollments avg growth is +9% YOY / Graduation ratio is over 50% of totals

PRTE ENGAGEMENT

LOYALTY PROGRAM LEADING TO BOOKINGS

LOYALTY PROGRAM BOOKED ROOMS NIGHTS BY SOURCE



LEISURE SALES ACTIVITY

RECENT & FUTURE

- In-Person coverage of multiple source markets, working with top accounts:
 - Hotelbeds Marketplace in Amsterdam & Cancun
 - CHTA Marketplace in Barbados
 - Multiple Virtuoso events in LATAM, Canada and Domestic
 - Met with over 400 accounts at IPW with key wholesalers from around the world
 - ABC/CCRA participation in multiple events throughout the US and for the first time bringing their PowerSolutions event to Puerto Rico this August at El Conquistador, followed by a Fam Trip. Attendance is expected to exceed 100 advisors.
 - Additionally covering several ASTA Chapter meetings in various states as well as other ASTA events
 - Upcoming Colombia Sales Mission and Spain Sales calls and events in multiple cities

hotelbeds



VIRTUOSO®
PREFERRED



LEISURE SALES CO-OPS

SUPPORTING IBERIA DIRECT SERVICE

- Implementing B2B2C activities resulting in the continued improvement of Iberia Airlines' and Code Share partner's load factors to Puerto Rico
 - Viajes El Corte Ingles is Iberia's # 1 producer to SJU
 - Edreams, top OTA follows as Iberia's # 2
 - TUI conducting activities covering multiple cities in Spain
 - Viajes Catai, under Avoris' umbrella with itineraries covering the Island's South and West Regions
 - Viajes Carrefour providing coverage throughout 440 retail outlets inside and outside the Carrefour megastores
 - World2Meet, under Icarion, the top producing Bed Bank out of Spain
 - Logitravel, now part of Viajes El Corte Ingles group as their key OTA

VIAJES

El Corte Inglés

eDreams

TUI
España

CATAI
TOURS

Carrefour
viajes

W2M
WORLD2meet
DYNAMIC TRAVEL PARTNER

LOGITRAVEL

Spain Campaign

MULTIPLE CO-OPS



VIVE
Boricua

DESCUBRE
Puerto Rico



www.logitravel.com

VIVE **Boricua** | DESCUBRE *Puerto Rico*

ICARION

CARIBE





Activity

EVENTS, ROADSHOWS, TRADESHOWS



VIRTUOSO U.S. CONNECTS

NYC & WASHINGTON DC



Virtuoso Connects are small-scale networking events designed to network, deepen relationships, and share the latest offerings for Virtuoso Advisors' clients.
March 7-8, 2023.

VIRTUOSO FORUM

LOS CABOS - MEXICO

- March 12-15, 2023
- Participation of one partner: The St. Regis Bahia Beach Resort, Puerto Rico
- Virtuoso Forums offer agency owners and managers the opportunity to gather in a collaborative setting that promotes learning, sharing, and empowerment
- Sponsored closing Lunch
- Presentation to all 80 Virtuoso agency Owners and Directors



SEATRADE GLOBAL CONVENTION

FORT LAUDERDALE



Cruise industry event that re-connected every sector of the cruise industry under one roof to network, promoted new developments and business opportunities, and close agreements.

March 27-30, 2023.

MARKETHUB EUROPE BY HOTELBEDS

AMSTERDAM, NETHERLANDS

- March 28-30, 2023
- Amsterdam, Netherlands
- 400 participants
- Decision-makers from all areas of the Transient Leisure channels, including key distributors in Europe and the Middle East.
- Sustainability panel participation
- Speed track meetings with over 50 wholesalers and OTAs
- Meetings with Hotelbeds Europe Product Managers



CANCÚN MARKETHUB

BY HOTELBEDS

- May 9-12, 2023
- The MarketHub event bring together the key decision-makers and top influencers from today's global travel industry
- Participation of Johanna González in the Panel "How can travel become a force for good"



ASTA SOUTH FLORIDA

SPRING AFFAIR

- April 4, 2023
- Annual ASTA Chapter event
- Top 100 advisors from the South Florida area attending
- Addressed the General Session with emphasis on the upcoming ASTA General Convention in Puerto Rico
- Networking opportunities with agency Owners and Directors
- Driving interest and educating advisors from this important Miami – Fort Lauderdale – Boca & Palm Beach source markets



SACRAMENTO ASTA SBN CITY2SEA

CITRUS HEIGHTS, CA

- April 6, 2023
- Annual ASTA Chapter event
- Top 2023 supplier presentations, supplier panels, supplier question and answer with Business Development Managers, and a tradeshow



SPAIN/COLOMBIA FAM TRIP

HILLS BALFOUR

- April 18-22, 2023
- 9 attendees
- The attendees enjoyed historic Old San Juan, the Santurce es Ley murals, La Placita, El Yunque, Ponce, and Lajas, and hotel site inspections in Old San Juan, Condado, Rio Grande, Ponce, and Isla Verde. They even had time to shop at Plaza Las Americas and enjoy our magnificent cays at La Parguera and its bioluminescent bay at night.



VIAJES CARREFOUR FAM TRIP

400 AGENCIAS THROUGHOUT SPAIN

- April 18-25, 2023
- 12 travel advisors from Viajes Carrefour
- 1 IBERIA representative
- They stayed at Embassy Suites San Juan Hotel & Casino, Wyndham Palmas Beach and Golf Resort, El Conquistador Resort, Aloft Ponce, Copamarina Beach Resort, and Condado Ocean Club. They also visited the Hyatt Regency Grand Reserve Puerto Rico, Wyndham Grand Rio Mar Puerto Rico Golf & Beach Resort, Dorado Beach, A Ritz Carlton Reserve, and La Concha Renaissance San Juan Resort



CANADA FAM TRIP

HILLS BALFOUR

- April 22-29, 2023
- 6 attendees
- It was focused on adventure and gastronomy. The itinerary included the following activities: a food tour in Old San Juan, a mixology class at Casa Bacardi, dinner at Distrito T-Mobile, El Yunque, a yoga class at Dos Aguas B&B, Loiza's Heritage tour, and a cooking class at an agrotourism farm in Santa Isabel. Hotel site visits included properties in Old San Juan, Rio Grande, Fajardo, Condado, El Distrito, and Isla Verde.



PRE/POST ASTA FAMS

APRIL 28-MAY 2 & MAY 5-8

- Pre FAM of Family and Adventure: 26 travel advisors
- Pre FAM of Luxury: 18 travel advisors
- Post FAM of Family and Adventure: 9 travel advisors
- Post FAM of Luxury: 11 travel advisors



ASTA GLOBAL CONVENTION

PUERTO RICO

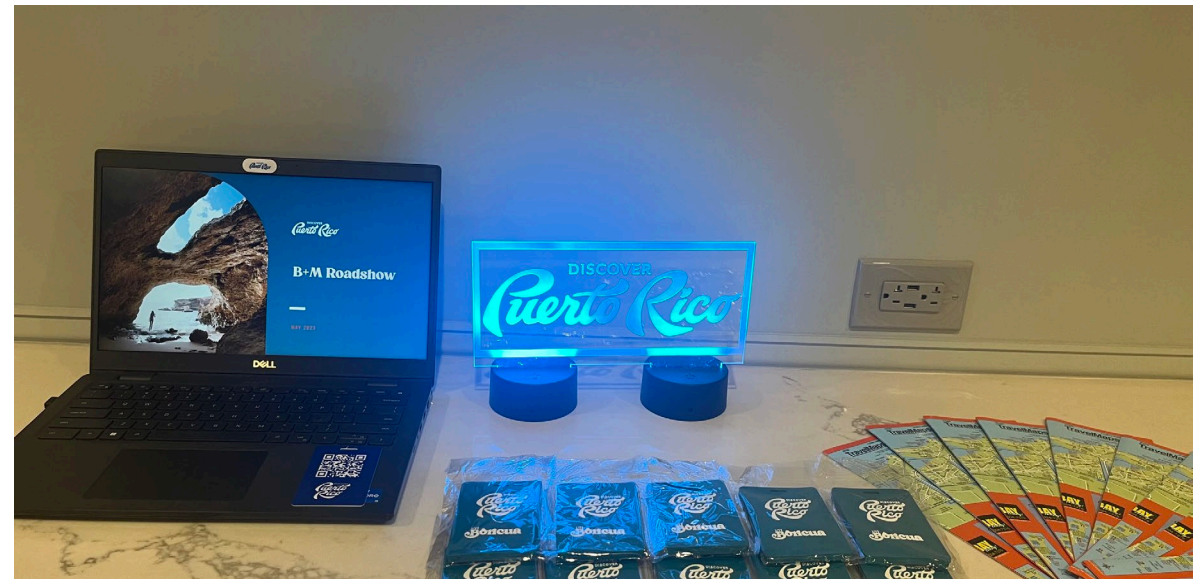
- May 2-4, 2023
- Participation of the following partners: El Conquistador Resort, El Fairmont San Juan Hotel, Hyatt Regency Grand Reserve Puerto Rico, The Condado Collection, Casa Bacardí, Holiday Inn Mayagüez / Ponce, Wyndham Grand Rio Mar Puerto Rico Golf & Beach Resort, Bespoke Lifestyle Management, Parador Mauna Caribe, Puerto Rico Tourism Company, Castillo Destination Management, RST Destination Management Company, and The Spoon Experience



B+M 10TH ANNIVERSARY ROADSHOW

NYC, ATLANTA, CHICAGO

- May 8-10, 2023
- Bennett + Mercado Hospitality celebrated its 10th anniversary this May. Events were tailored for networking with Discover Puerto Rico own dedicated space
- NYC: 82 travel advisors
- Atlanta: 42 travel advisors
- Chicago: 24 travel advisors



POWER SOLUTIONS

CHICAGO

- May 12, 2023
- Roundtables with all the travel advisors
- 110 attendees
- Tradeshow



UK FAM TRIP

HILLS BALFOUR

- May 14-18, 2023
- In conjunction with Hills Balfour
- 7 attendees
- Visited: Isla Verde, Old San Juan, Orocovis, Cayey, Humacao, Fajardo, Luquillo, Rio Grande, El Distrito and Condado



ARLAG

GUADALAJARA, MEXICO

- May 17-19, 2023
- 675 attendees
- The ARLAG expo is an important event to establish direct contact with travel agencies from all of Mexico and abroad by establishing business relationships
- Discover Puerto Rico sponsored the transportation of travel agents to Guadalajara on May 17, and lunch on May 19
- Relation with Copa Vacations



IPW 2023

SAN ANTONIO, TEXAS

- May 20-24, 2023
- Partners:
 - El Conquistador Resort
 - Hyatt Regency Grand Reserve Puerto Rico
 - Wyndham Grand Rio Mar Puerto Rico Golf & Beach Resort
 - Royal Sonesta San Juan



OTHER EVENTS

- Cruise 360 - April 18-23, 2023
- Virtuoso On Tour, Toronto - April 13-14, 2023
- Caribbean Travel Marketplace – May 9-11
- Virtuosos Symposium - May 17-21, 2023



Group Sales Performance

KIM DAROJA
VICE PRESIDENT OF SALES

PRODUCTION YOY – COMPARISON

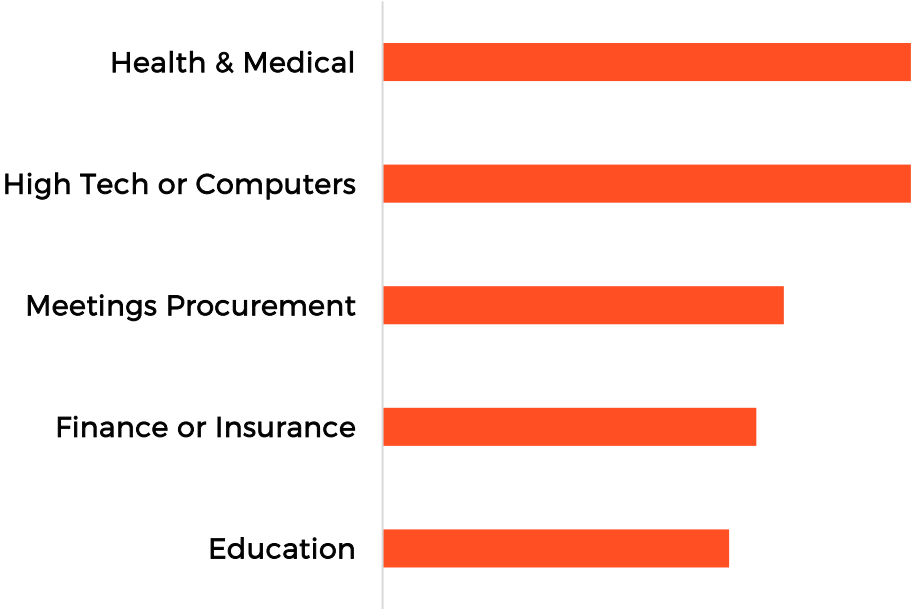
AS OF APRIL 2023

	April 2023	April 2022	Variance	July 2022 – April 2023	July 2021 – April 2022	Variance
Definite Bookings	30	20	+50%	299	193	+54.9%
Booked Room Nights	14,984	9,766	+53.4%	131,848	107,473	+22.7%
New Leads Generated and Room Nights Potential	138 101,236	153 107,786	-9.8% -6.1%	1,390 929,756	1,063 794,142	+30.8% +17.1%

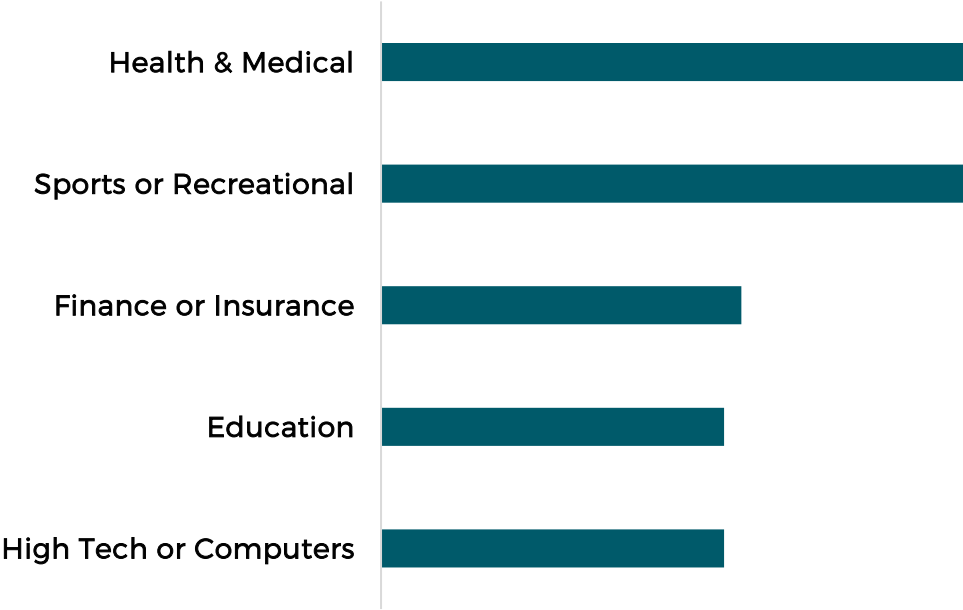
JULY 2022 – APRIL 2023 FY PRODUCTION

LEADS GENERATED & BOOKING DEMAND BY MARKET SEGMENT

LEADS GENERATED BY MARKET SEGMENT



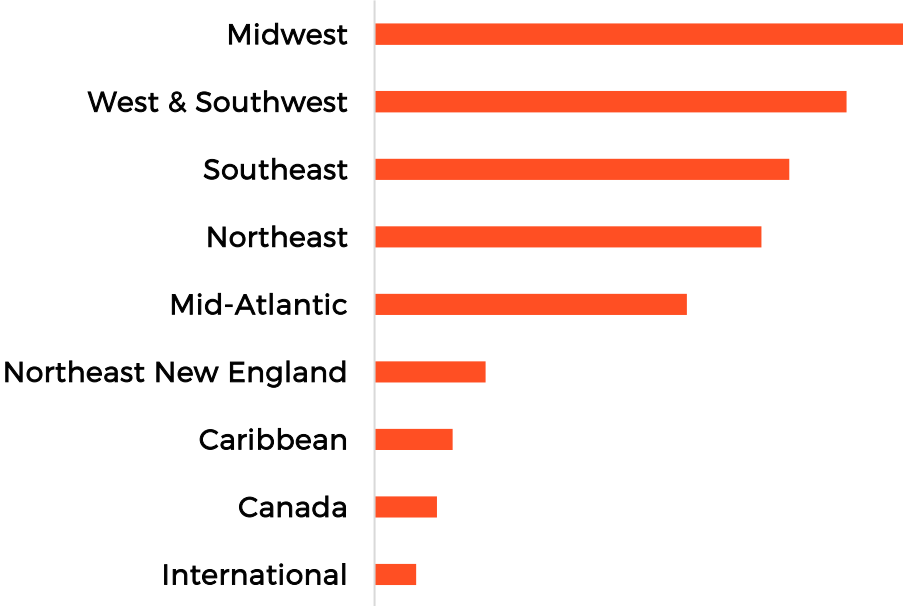
BOOKINGS BY MARKET SEGMENT



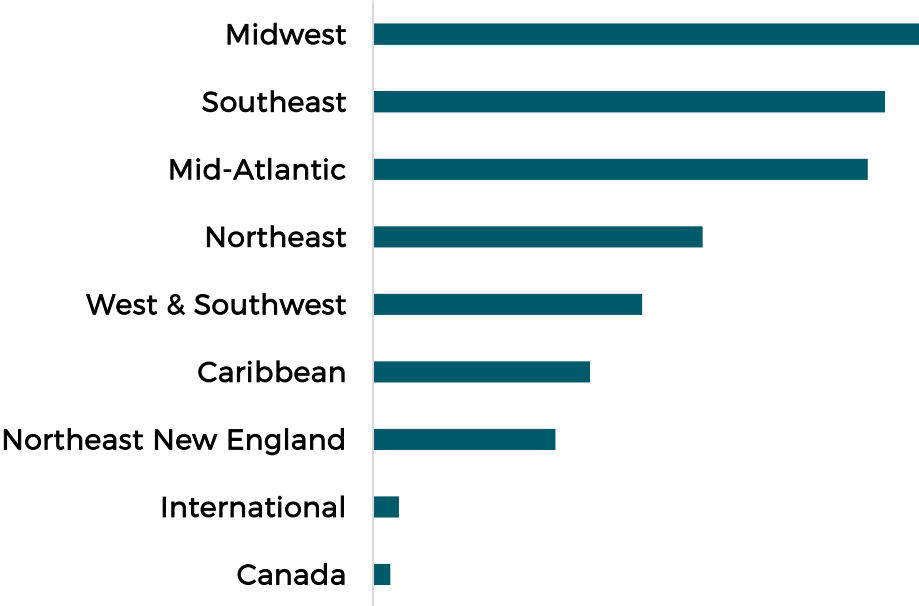
JULY 2022 – APRIL 2023 FY PRODUCTION

LEADS GENERATED & BOOKING DEMAND BY REGION

LEADS GENERATED BY REGION



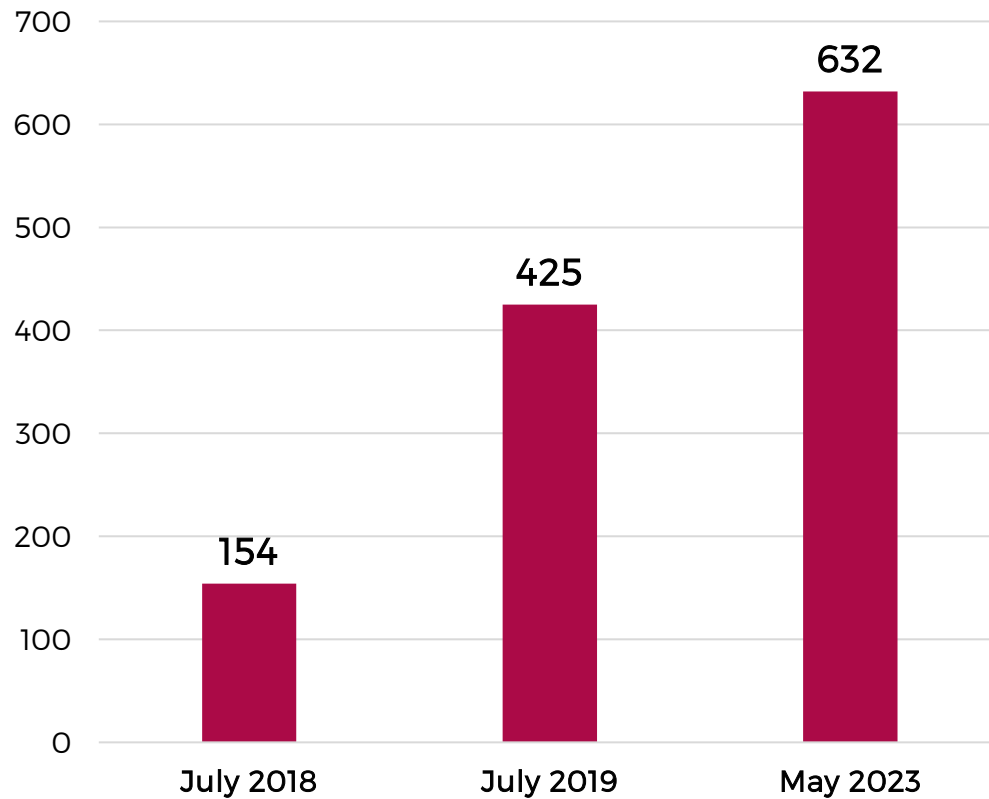
BOOKINGS BY REGION



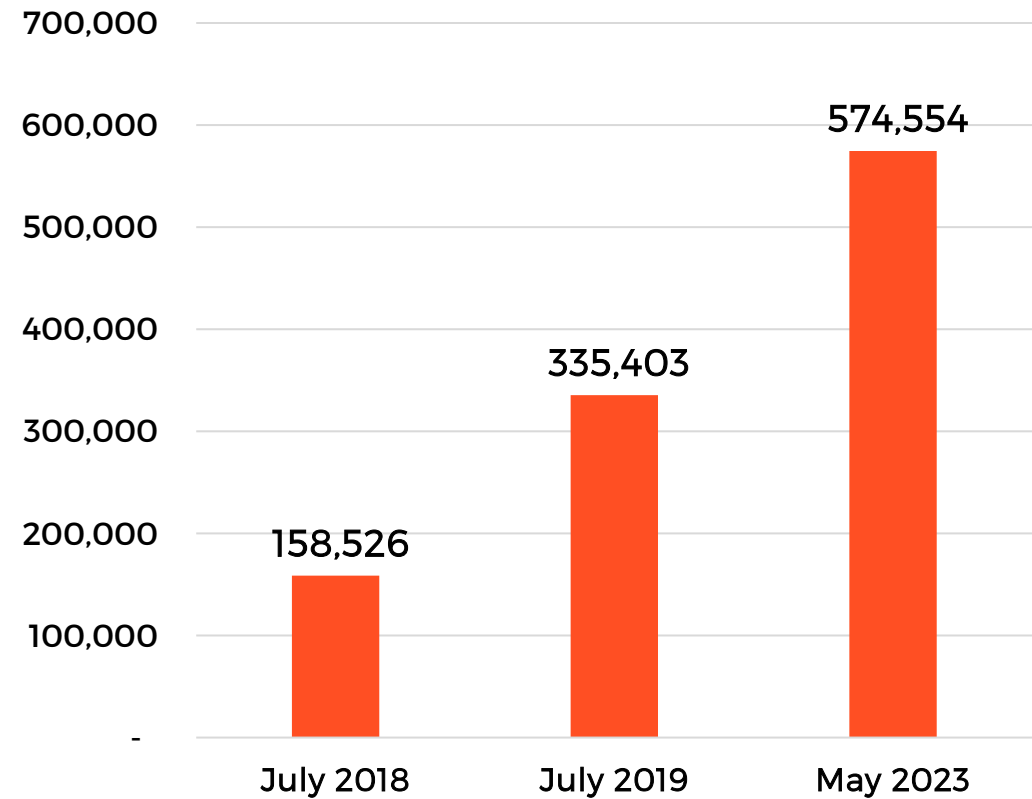
SALES PIPELINE AS OF MAY 1, 2023

\$437.3M ECONOMIC IMPACT

Leads



Requested Room Nights



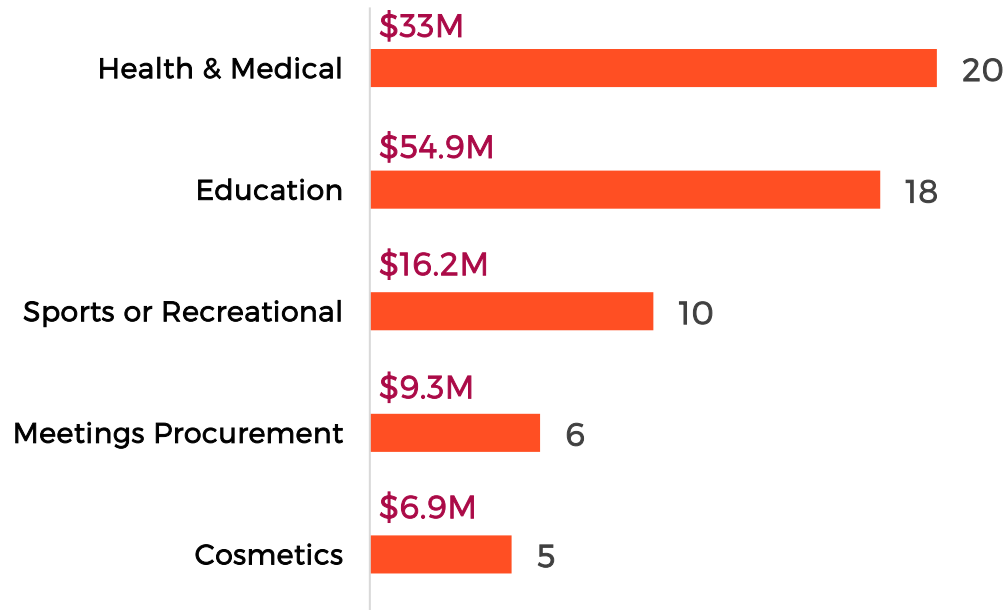
PRCC Sales Performance

JACQUELINE ROSA
DIRECTOR OF CONVENTION SALES STRATEGY

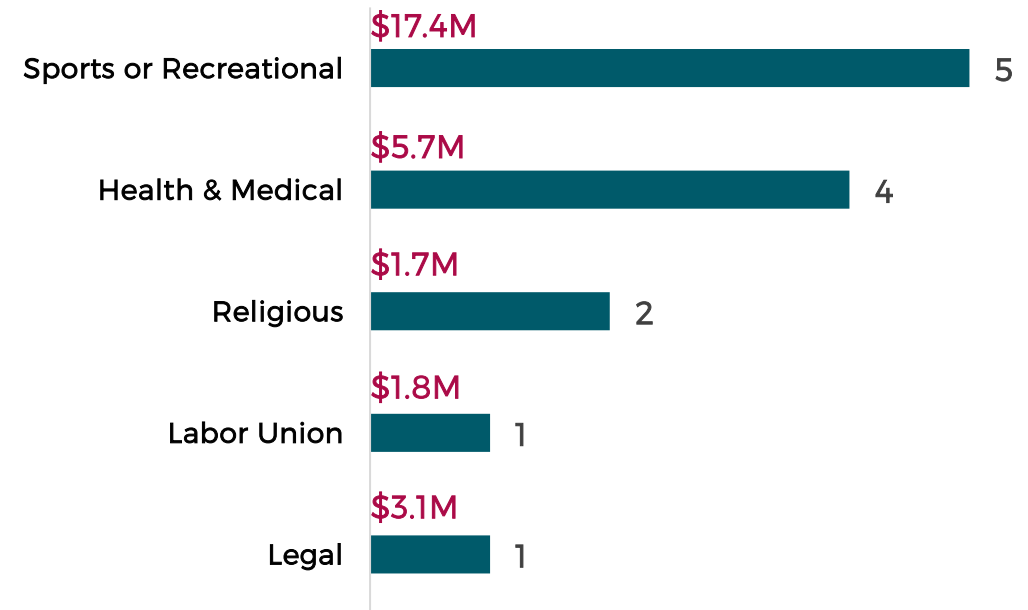
PRCC JULY 2022 – APRIL 2023 FY PRODUCTION

LEADS GENERATED & BOOKING DEMAND BY MARKET SEGMENT

LEADS GENERATED BY MARKET SEGMENT



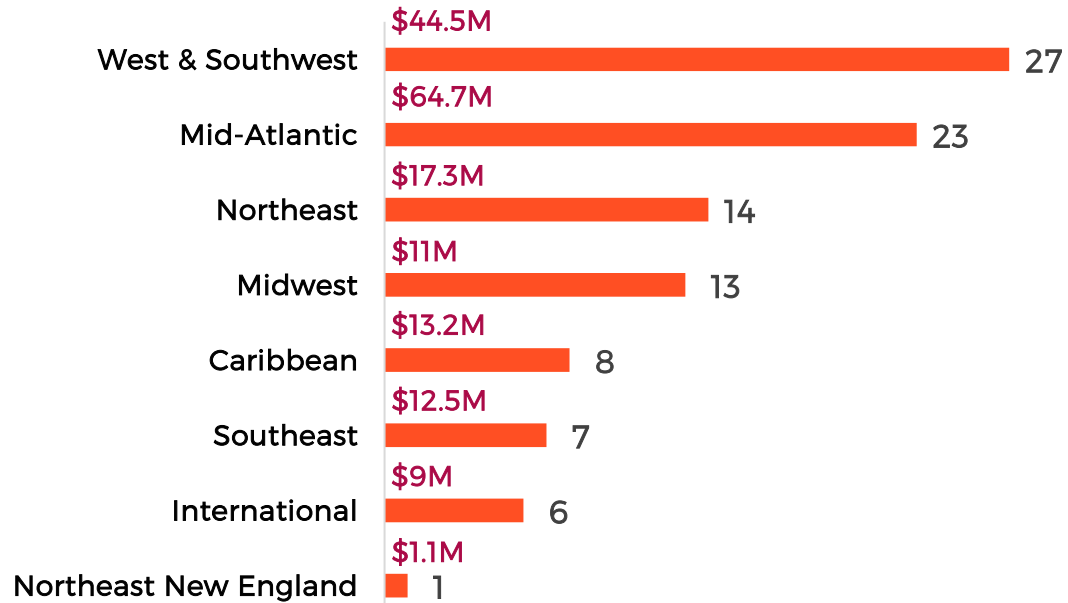
BOOKINGS BY MARKET SEGMENT



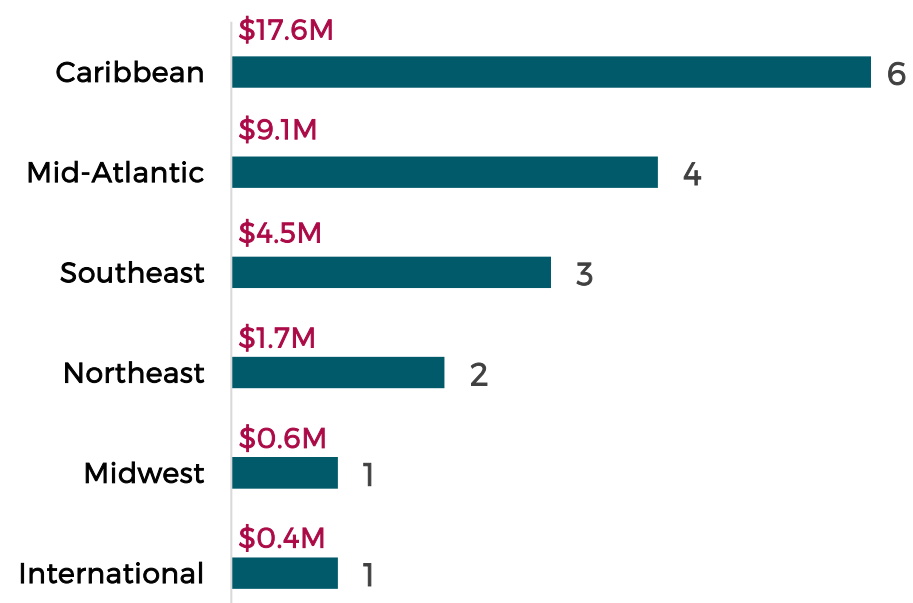
PRCC JULY 2022 – APRIL 2023 FY PRODUCTION

LEADS GENERATED & BOOKING DEMAND BY REGION

LEADS GENERATED BY REGION



BOOKINGS BY REGION



PRCC PRODUCTION YOY – COMPARISON

AS OF APRIL 2023

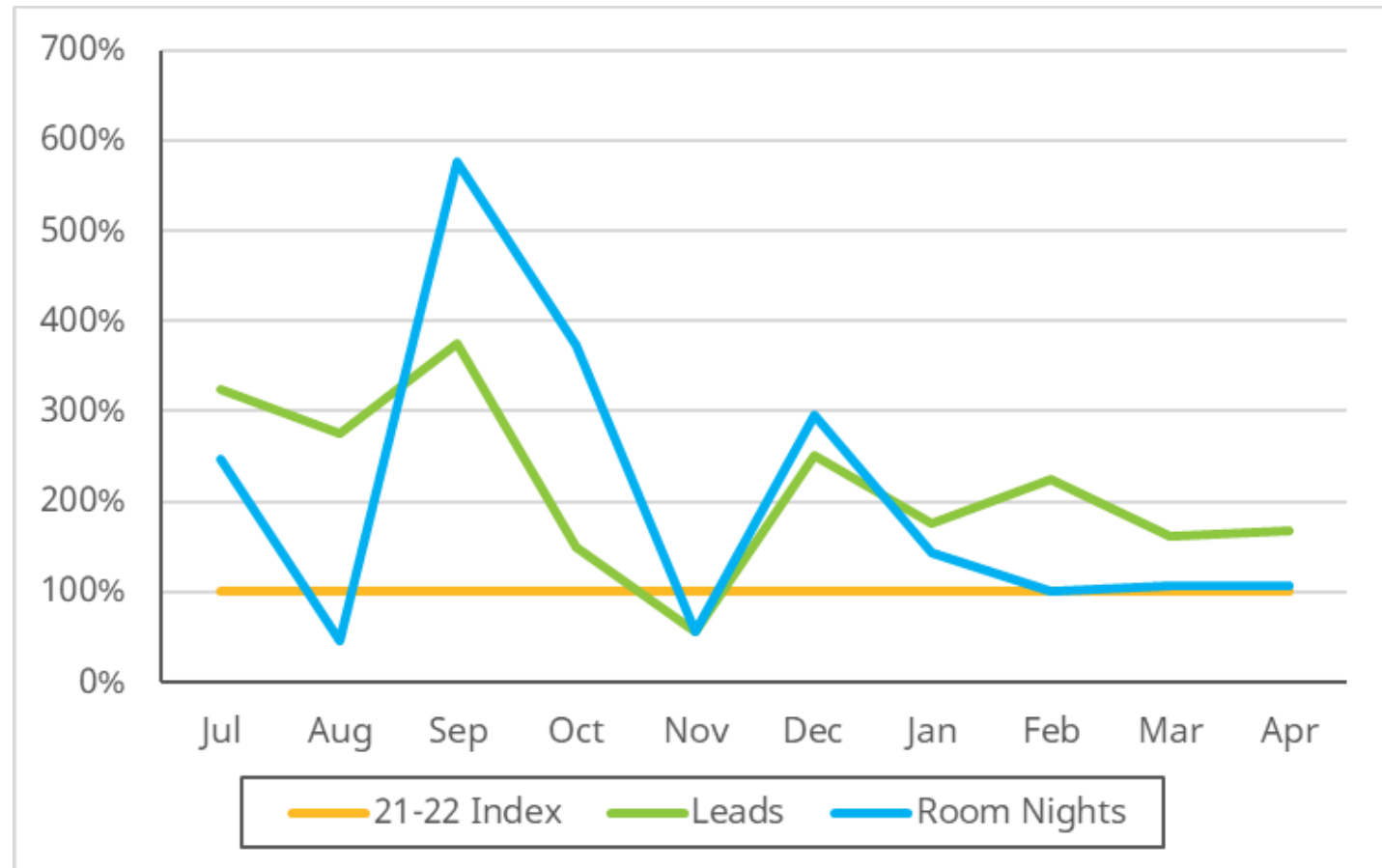
	April 2023	April 2022	Variance	July 2022 – April 2023	July 2021 – April 2022	Variance
Definite Bookings	1	1	0%	18	14	+29%
Booked Room Nights	300	1,195	-75%	24,441	22,041	+11%
New Leads Generated and Room Nights Potential	11 24,312	6 19,456	+83.3% +25%	99 246,636	53 212,468	+86.8% +16.1%

PRCC LEAD – COMPARISON VS STLY

22-23 VS 21-22 AS OF APRIL 2023

- +87% # leads
- +16% in Room Nights
- +94% Attendees
- 36% average peak nights

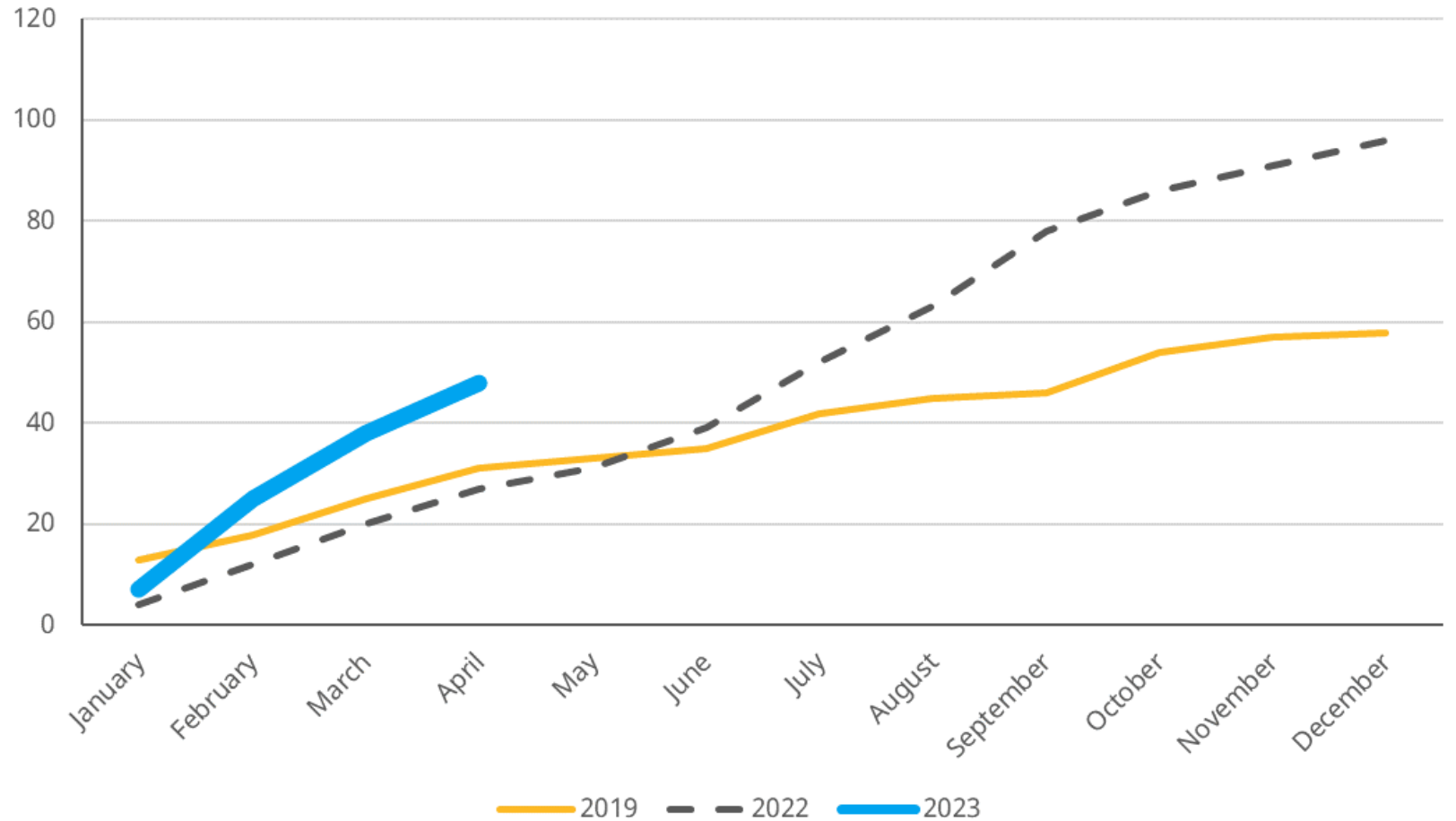
Current average peak 583
STLY 21-22: 908 (-36%)
STLY 18-19: 718 (-19%)



PRCC LEAD – COMPARISON VS STLY

AS OF APRIL 2023

2022 +66% # Leads vs 2019
YTD +55% # Leads vs 2019
YTD +78% # Leads vs 2022



PRCC REQUESTED ROOM NIGHTS

CALENDAR YEAR: JANUARY - APRIL



DMO PROGRESS AND PIPELINE HEALTH

- PRCC 152,700 sq. ft of Exhibit Space
- 600,00 sq. ft total meeting space
- Max capacity of 10,000 ppl.



PROGRESS



PIPELINE HEALTH

Category C: DMOs progress and pipeline health

Category C – DMOs with a convention center exhibit space between 100,000 - 499,999 gross square feet (46 destinations)

52

simpleview  52

DMO PROGRESS AND PIPELINE HEALTH

2022-YEAR END



Category C: number of leads

The total number of leads (hotel and convention center) for Category C was down 1.5% compared to 2019.

End of Quarter/Year compared to 2019

Q1 2022: -10.5%

Q2 2022: -1.7%

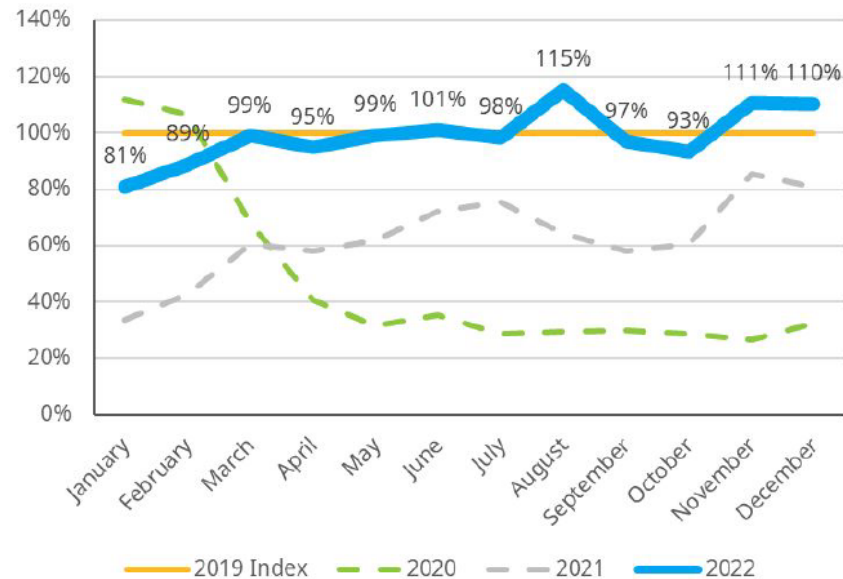
Q3 2022: 3.6%

Q4 2022: 3.5%

2022 Year End: -1.5%

Number of leads through December 2022

Percentage of 2019 index

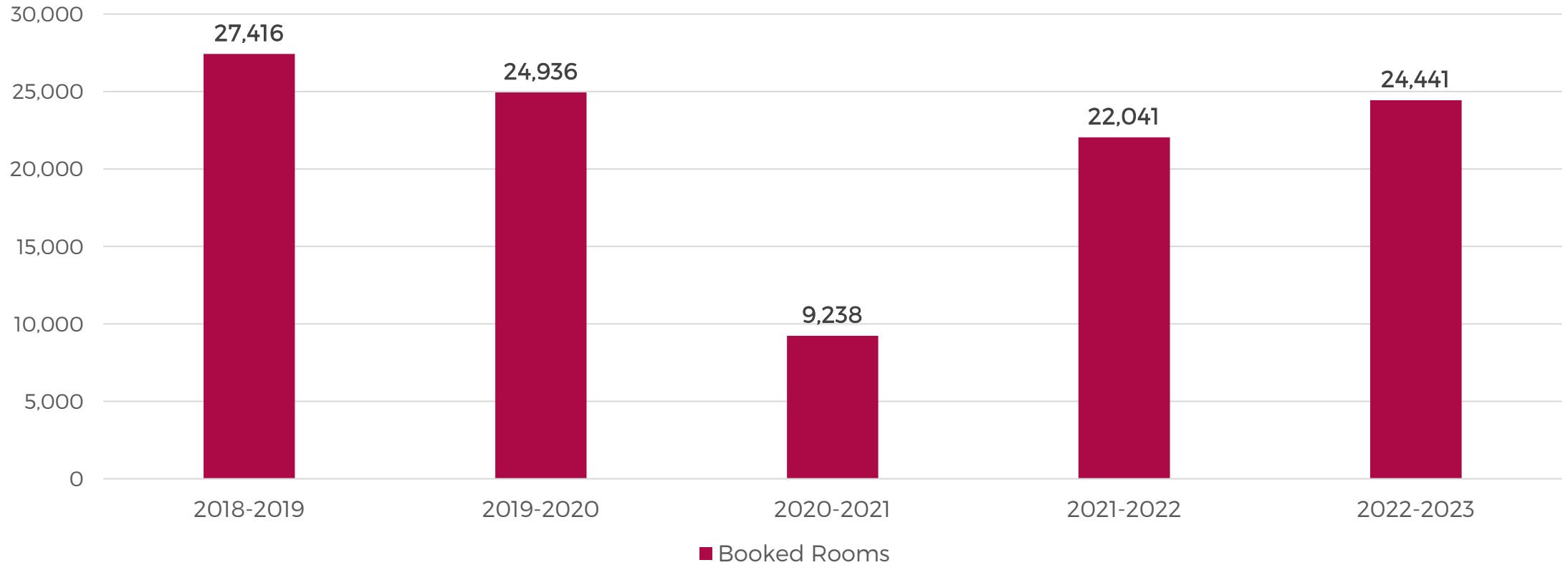


Category C – DMOs with a convention center exhibit space between 100,000 - 499,999 gross square feet (46 destinations)

PRCC BOOKED ROOM NIGHTS

FISCAL YEAR: JULY - APRIL

Booked Rooms



DMO BOOKED ROOM NIGHTS

FISCAL YEAR: JULY - APRIL



Category C: booked convention center event room nights and attendance

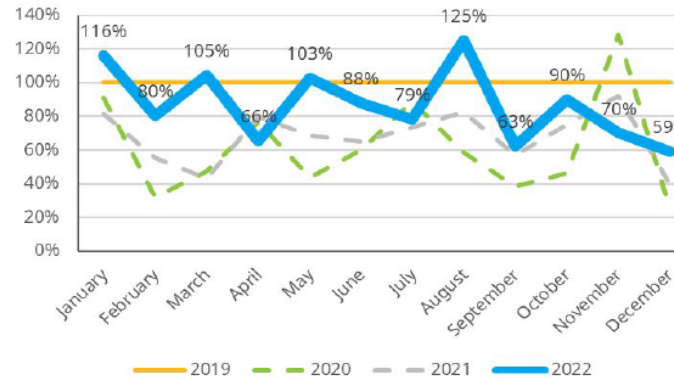
What are we seeing for Category C?

Booked convention center event room nights were down 17.7% through 2022 compared to 2019.

Overall, **convention center event attendance was down 9.6% in 2022 compared to 2019.**

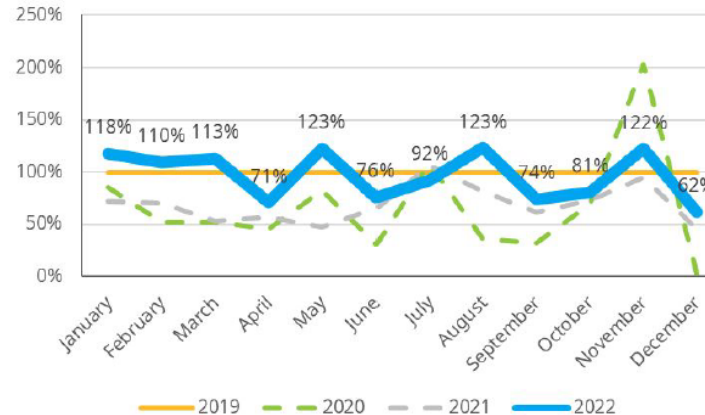
Booked convention center event room nights through December 2022

Percentage of 2019 index



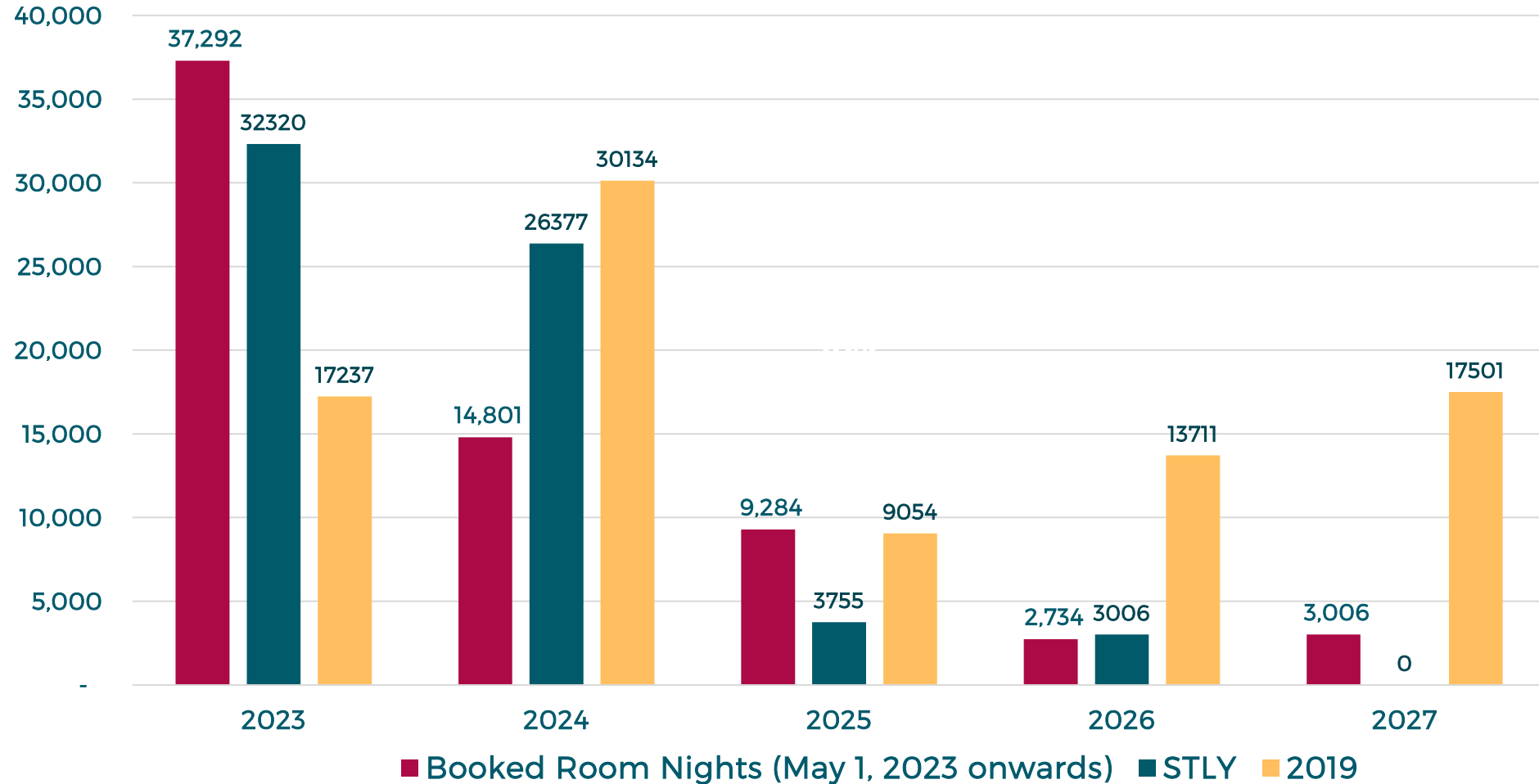
Booked convention center event attendance through December 2022

Percentage of 2019 index



PRCC OTB RN BY YEAR

46,908 = \$34.4 MILLION IN LOCAL ECONOMIC IMPACT



PRCC OTB RN BY MONTH/ YEAR

VS STLY 22-23

OTB Room Nights

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
2023	12034	2996	250	2932	2304	7725	872	2361	1275	3027	229	1287	37,292
2024	2,854	0	4,883	0	2,965	4,099	0	0	0	0	0	0	14,801
2025	0	5,789	0	0	0	0	0	0	0	0	3,495	0	9,284
2026	0	0	0	0	0	0	0	0	0	2,734	0	0	2,734
2027	0	0	0	0	0	0	0	0	0	0	3,006	0	3,006
2028	0	0	0	0	0	0	0	0	0	0	0	0	-
2029	0	0	0	0	0	0	0	0	0	0	0	0	-
2030	0	0	0	0	0	0	0	0	0	0	0	0	-
TOTAL													67,117

Variance STLY	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
ITYFY	12,034	2,996	(2,177)	1,214	(3,233)	2,229	(1,229)	2,361	(407)	(10,332)	229	1,287	4,972
1 year out	(9,180)	-	4,883	(2,808)	661	(2,806)	-	(1,086)	-	(1,240)	-	-	(11,576)
2 years out	-	3,459	-	-	-	-	-	-	-	-	2,070	-	5,529
3 years out	-	-	-	-	-	-	-	-	-	2,734	(3,066)	-	(332)
4 years out	-	-	-	-	-	-	-	-	-	-	3,006	-	3,006
5 years out	-	-	-	-	-	-	-	-	-	-	-	-	-
6 years out	-	-	-	-	-	-	-	-	-	-	-	-	-
7 years out	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Rns												1,599	

PRCC ACTIVE PIPELINE

OTB Room Nights

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
2023	12034	2996	250	2932	2304	7725	872	2361	1275	3027	229	1287	37,292
2024	2,854	0	4,883	0	2,965	4,099	0	0	0	0	0	0	14,801
2025	0	5,789	0	0	0	0	0	0	0	0	3,495	0	9,284
2026	0	0	0	0	0	0	0	0	0	2,734	0	0	2,734
2027	0	0	0	0	0	0	0	0	0	0	3,006	0	3,006
2028	0	0	0	0	0	0	0	0	0	0	0	0	-
2029	0	0	0	0	0	0	0	0	0	0	0	0	-
2030	0	0	0	0	0	0	0	0	0	0	0	0	-

Active Pipeline

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
2023	0	0	0	0	0	100	0	1150	0	1955	5925	0	9,130
2024	8,645	11,314	3,242	6,197	400	608	4,180	525	6,105	746	9,043	0	51,005
2025	3,158	4,059	0	3,032	6,381	12,671	0	0	0	7,453	0	0	36,754
2026	5842	6060	1,490	4534	892	3816	2111	0	0	0	10495	0	35,240
2027	4215	1918	3,650	0	3503	31643	0	0	4245	0	0	0	49,174
2028	0	0	760	0	0	5157	0	8000	0	0	3,755	0	17,672
2029	0	0	760	0	0	0	0	0	0	0	0	0	760
2030	0	0	760	0	0	0	0	0	0	0	0	0	760

PRCC ACTIVE PIPELINE

Active Pipeline

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total	
2023	0	0	0	0	0	100	0	1150	0	1955	5925	0	9,130	
2024	8,645	11,314	3,242	6,197	400	608	4,180	525	6,105	746	9,043	0	51,005	
2025	3,158	4,059	0	3,032	6,381	12,671	0	0	0	7,453	0	0	36,754	
2026	5842	6060	1,490	4534	892	3816	2111	0	0	0	10495	0	35,240	
2027	4215	1918	3,650	0	3503	31643	0	0	4245	0	0	0	49,174	
2028	0	0	760	0	0	5157	0	8000	0	0	3,755	0	17,672	
2029	0	0	760	0	0	0	0	0	0	0	0	0	760	
2030	0	0	760	0	0	0	0	0	0	0	0	0	760	
													TOTAL	200,495
														95,872

Variance STLY	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total	
ITYFY	-	-	-	-	(370)	100	(950)	1,150	-	1,955	5,925	(6,800)	1,010	
1 year out	8,645	11,314	(958)	6,197	(3,821)	608	(525)	525	4,894	746	9,043	-	36,668	
2 years out	3,158	3,559	-	1,021	(1,350)	12,671	(5,475)	(800)	-	7,453	-	-	20,237	
3 years out	5,842	6,060	1,490	4,534	(9,424)	3,816	2,111	-	-	-	8,425	-	22,854	
4 years out	(8,185)	1,918	3,650	(3,182)	3,503	31,643	-	-	4,245	-	-	(4,885)	28,707	
5 years out	-	-	760	-	-	(18,888)	-	8,000	-	-	3,755	-	(6,373)	
6 years out	-	-	760	-	-	-	-	-	-	-	-	-	760	
7 years out	-	-	760	-	-	-	-	-	-	-	-	-	760	
													Total Rns	104,623

TRAVEL CLICK 2023 YOY OCC. CHANGE

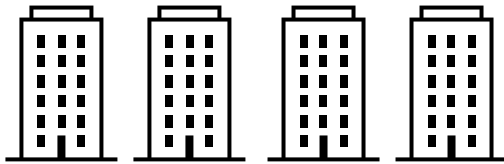
Market	Puerto_Rico_PR			
Year	Committed Occupancy %	YoY Committed Occupancy Change	YoY Group Committed Change	YoY
Q1	82.8%	18.2%	60.1%	
January	78.2%	49.6%	112.5%	
February	85.6%	17.1%	48.2%	
March	84.9%	-0.2%	37.7%	
Q2	71.8%	-1.6%	9.0%	
April	83.1%	-2.2%	25.1%	
May	76.7%	-2.2%	6.0%	
June	55.4%	0.3%	3.0%	
Q3	21.9%	-6.6%	-10.8%	
July	32.5%	-11.1%	-25.2%	
August	21.1%	7.0%	13.1%	
September	11.8%	-14.3%	-12.2%	
Q4	11.9%	-16.4%	-17.5%	
October	12.1%	-34.1%	-37.8%	
November	12.1%	-9.7%	-10.2%	
December	11.5%	5.4%	23.4%	
Total	46.8%	4.2%	9.6%	

CONVENTION CENTERS (US)

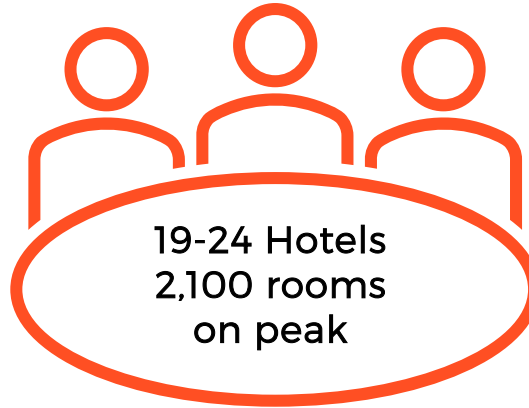
Location	Exhibit Sq. Ft	Hotel Rooms
Atlantic City	500,000	3337
Miami Beach	500,000	6,656
St. Louis	502,000	5433
San Antonio	514,000	10,884
Salt Lake City	515,000	5,657
Phoenix	584,500	4,286
San Juan	600,000	??
San Diego	615,701	8,126
Louisville, Ky.	680,000	1512
Washington, D.C.	703,000	9,183
Detroit	723,000	3,546

PRCC ROOM BLOCKS

District Area

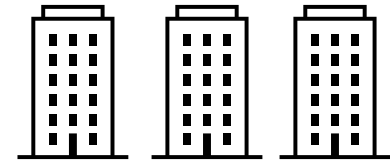


550-600 rooms on peak
Walking distance
4 Hotels



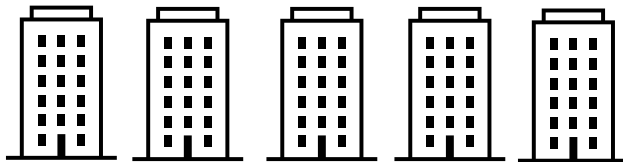
19-24 Hotels
2,100 rooms
on peak

Close Proximity



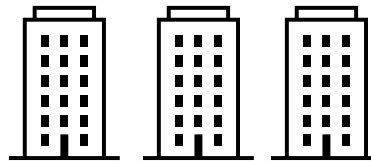
550 rooms on peak
5 Minute Drive
3 Hotels

Condado Area



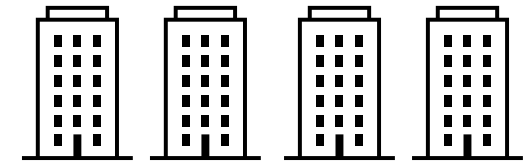
550-600 rooms on peak
8-12 Minute Drive
5 Hotels

Old San Juan



200 rooms on peak
8-10 Minute Drive
3 Hotels

Isla Verde



200-220 rooms on peak
15-20 Minute Drive
4 Hotels

NEXT STEPS

- Review your funnel
 - Room Blocks
 - Rates
 - Resort Fees
 - Concessions
 - Alternate dates
- Group Commitment Calendar
 - Need dates
 - Limited Availability
 - Blackout dates
- List of target groups (Please review)
- Identify target Groups (Incentives)
- Schedule a strategy call
- Business Review Call (Continue/ Stop)
- Feedback

Initiatives



INITIATIVES – CITYWIDE FAM (JUN 1-3)

- 19 Qualified Planners (Largest FAM up to date)
- June 1-3, 2023:
 - Thu: Arrival, Site inspection of the PRCC and The Sheraton
 - Fri: District Hotels, Condado Vanderbilt and La Concha
 - Sat: Condado Plaza, San Juan Marriott, Royal Sonesta, Vivo Beach Club, Casa Bacardi and Distrito T-Mobile
 - Conducting a round-table to get feedback

INITIATIVES

- Strategizing with the NSD's on focusing on target groups (That are not currently in our funnel) or repeat groups during need periods (600-1200 rooms on peak)
- Prospecting Cvent, Mint, and Simpleview. Peggy is also working with other ASM Global venues to share group opportunities.
- In addition to the sales activations, we are organizing Think-Tanks for Citywide planners by City. Session to create awareness of our destination and convention center.
- Your feedback is always crucial and important for us. So please take time to provide your feedback and complete our surveys. There were some feedback on reports that we will consider for our next meetings.

PRCC Need Dates



PRCC NEED DATES

MAY 30, 2023

- January 2 - 6, 2024
- July 1 - 8, 2024 (Sports event in Exhibit Halls)
- July 29 - Ago 5, 2024
- August 10 - 14, 2024
- August 31 - Sept 7, 2024
- September 26 - Oct 2, 2024
- October 30 - Nov 6, 2024 (Election Days)
- November 16 - 24, 2024
- December 9 -17, 2024
- January 2025 - Whole month
- February 6 - 11, 2025
- March 24 - 31, 2025
- April 27 - May 3, 2025
- May 24 - 30, 2025
- Jan, July, August and September (2024-2028)

PR DISTRICT AUTHORITY DEVELOPMENTS

- \$4M Investment in maintenance district and Antiguo Casino
- EcoExploratorio-Instituto de Resiliencia (March 2029)
- Restaurante Patria YARDS (October 2023)
- 90-100 room Apartment (Summer 2023 – 2025)
- 2 Hilton Hotels – 200-250 rooms
- Cruise Pier - San Juan Cruise Port, LLC
- Hotel, complex and entertainment and parking center
- A new concept of entertainment that does not exist in Puerto Rico whose protagonist is technology
- "Mixed development" scheduled for Bahia URBANA



PR DISTRICT AUTHORITY DEVELOPMENTS

- 4: Restaurant
- 6: Residence (Short-Term Rentals)
- 7-8: Office and Multi-level Building
- Next to the Hyatt's 250 Hilton Hotels
- Entertainment Virtual Center
- Behind the PRCC Wellness Center



DISTRICT AREA BRIDGE



GENERAL CONVENTION OF THE EPISCOPAL CHURCH 2027

Dates: June 26 – July 9, 2027 (14 days total/ 12 days peak)

Peak Rooms: 2,100 (We currently have the rooms but between 23 hotels)

EIC \$25M (This is based on their historical spend)

Historical rates: Highest rate paid was \$145, our current ADR is \$260 which is almost an 80% increase.

Closing Remarks

NEXT QUARTERLY MEETING - AUGUST 29TH (ALOFT SAN JUAN)



DISCOVER
Puerto Rico

Thank You
