

Soluciones de Información para el Turismo en Puerto Rico

Mastercard Advisors



Mastercard

Global Destination Cities Index 2016

AN EVOLVING WORLD MADE POSSIBLE BY EVOLVING CITIES.

Cities around the world are **engines for economic growth**. By examining data-driven trends on a regional and global scale, Mastercard predicts a shift in **which cities will attract visitors and how visitors will travel**.



INTERNATIONAL TRAVEL

International visitors in all 132 cities will continue to grow at a rate of **5.2% in 2016**.



SPENDING HABITS

Overall, those visiting the **Top 20** global destinations will spend more on shopping vs. dining.



BUSINESS CLASS

While most people visited the Top 20 cities for leisure, **54.6%** of visitors to Shanghai were there for business.

Top 10 Ciudades de Destino LATAM mas visitadas por Turistas en 2016

Chart 27. Latin America Top 10 Destination Cities by International Overnight Visitors (2016)

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Lima	Peru	4.10	4.73	3.74	3.96	4.03	1.7%	\$1.4
2	Mexico City	Mexico	2.28	2.38	2.59	2.71	2.98	10.0%	\$2.3
3	Punta Cana	Dominican Republic	2.03	2.11	2.33	2.55	2.73	7.0%	\$2.9
4	Sao Paulo	Brazil	2.11	2.22	2.22	2.25	2.30	2.1%	\$1.5
5	Buenos Aires	Argentina	2.22	2.01	2.09	1.96	2.02	3.1%	\$1.7
6	San Jose	Costa Rica	1.41	1.45	1.51	1.59	1.63	2.3%	\$0.9
7	Rio de Janeiro	Brazil	1.13	1.18	1.57	1.34	1.37	2.1%	\$1.0
8	Bogota	Colombia	0.83	0.89	1.01	1.15	1.26	10.0%	\$1.3
9	Montevideo	Uruguay	0.78	0.77	0.84	0.94	0.93	-0.2%	\$0.6
10	Quito	Ecuador	0.53	0.63	0.70	0.71	0.75	5.6%	\$0.4

Destination Insights

Herramientas construidos sobre un abordaje de Big Data aplicado a la información procesada por la red de Mastercard a nivel global

Provenientes de múltiples fuentes

- 40 millones de comercios
- 22,000 emisores

Limpias, agregadas, anonimizadas.

- 1.8 millones de reglas automatizadas
- Testeadas en forma continua



Almacenadas en gran escala

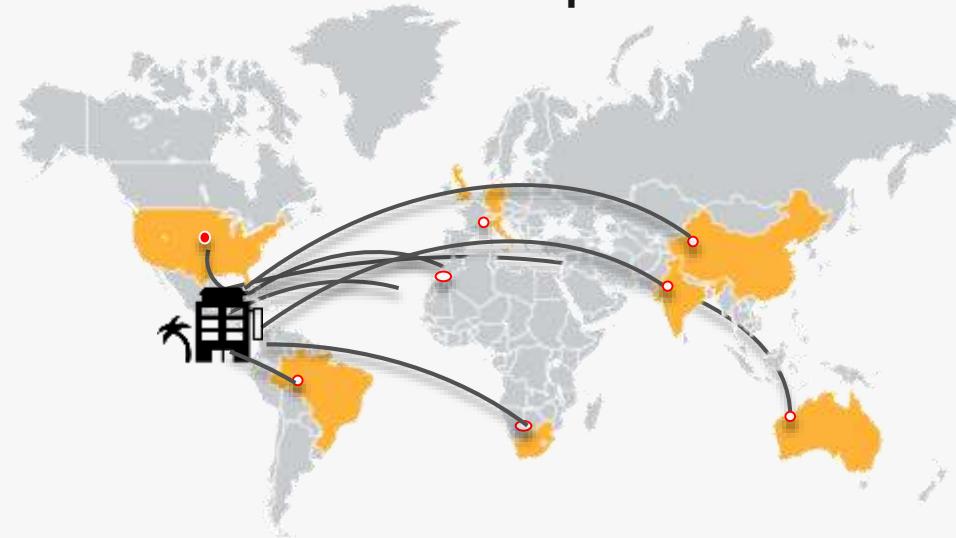
- 10 petabytes en Almacenamiento de Información
- 5+ años de visión histórica a nivel global
- Rápidas de recuperar
- Seguras y con protección de privacidad según los estándares más exigentes a nivel mundial

Transformadas en “insights” accionables

- Reportes, índices y *benchmarks*
- Variables conductuales
- Modelos, “scores” y pronósticos
- Econometría

Destination Insights es una solución enfocada en el segmento turístico y es de gran interés para la captura de tráfico cross-border adquirente

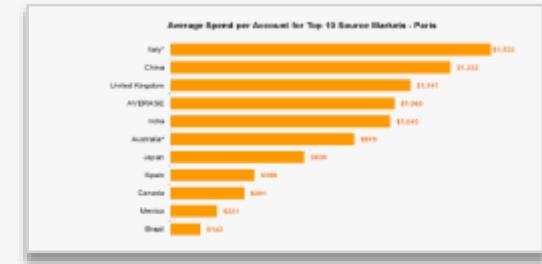
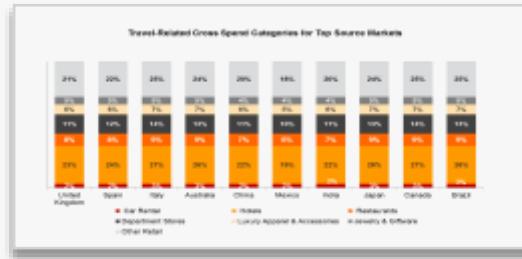
Los datos de Mastercard proporcionan una visión completa y de gran alcance de las dinámicas del mercado relacionadas con el sector turístico.



Destination Insights provee ideas que se pueden ejecutar fácilmente en las siguientes áreas:

- Estrategias de Mercadeo Internacional.
- Tener la capacidad local de servicios y de personal acorde a las temporadas mas altas del mercado.
- Planeación y Optimización de los medios de comunicación.
- Estrategias de expansión global.

Destination Insights responde las siguientes preguntas:



- Cuáles son **los principales mercados de origen** que visitan mi mercado?
- Durante el año cuáles son las **temporadas** altas y bajas de gasto de los turistas que visitan mi mercado?
- **Como ha cambiado la manera de gastar de los turistas** a través del tiempo?
- Cuáles son las **principales categorías** en las que los turistas que me visitan gastan su dinero?
- En que **países me debo concentrar para aumentar el gasto** en mi mercado como destino turístico?
- Cuál es el **comportamiento de gasto** de los mercados de origen que también gastan en mi mercado?

Global Traveler Intelligence Report

Puerto Rico

Disclaimer



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Executive Summary

- Peak international travel to Puerto Rico happens from December through March.
- The top origination markets for spend are the US, US Virgin Islands, Canada, the UK, and Germany; dominated by the US which spends significantly more than any other country
 - US spend could be due to expats or residents using foreign cards given that PR is a commonwealth (unincorporated territory of the United States)
- By account, visitors to Puerto Rico from the US Virgin Islands spend the most, spending about 3 times more than those from the United States
- The United Kingdom has the largest spend growth versus prior year, but the primary source of international spend, the United States, is also growing substantially with a 26% increase
- **USA and US Virgin Islands** travelers have a small share of spend in travel related categories indicating many may be longer-term visitors (such as ex-pats).
- **The United Kingdom** and **Germany** over index on **Hotel** spend while **Canada** over indexes on **Restaurants**.

Top 10 Origination Markets based on Spend Index

Peer Destination Market: Puerto Rico



Spend by US visitors in Puerto Rico is drastically decreasing, while remaining relatively similar for other peer markets.



Key Insights:

- A** The US tops the origination market spend index, spending ~87x more than the average global origination market in 2016, but overall spend is decreasing.
- The peer market top ten spender list includes origination markets that are not on the list of top ten spenders for the Caribbean market overall: Mexico, Norway, Spain, and Colombia.

Note:

1 All analysis is subject to Data Usage & Privacy laws by origination Market and Benchmarking Requirements.

YoY Spend Growth for Top 10 Origination Markets

Peer Destination Market: Puerto Rico

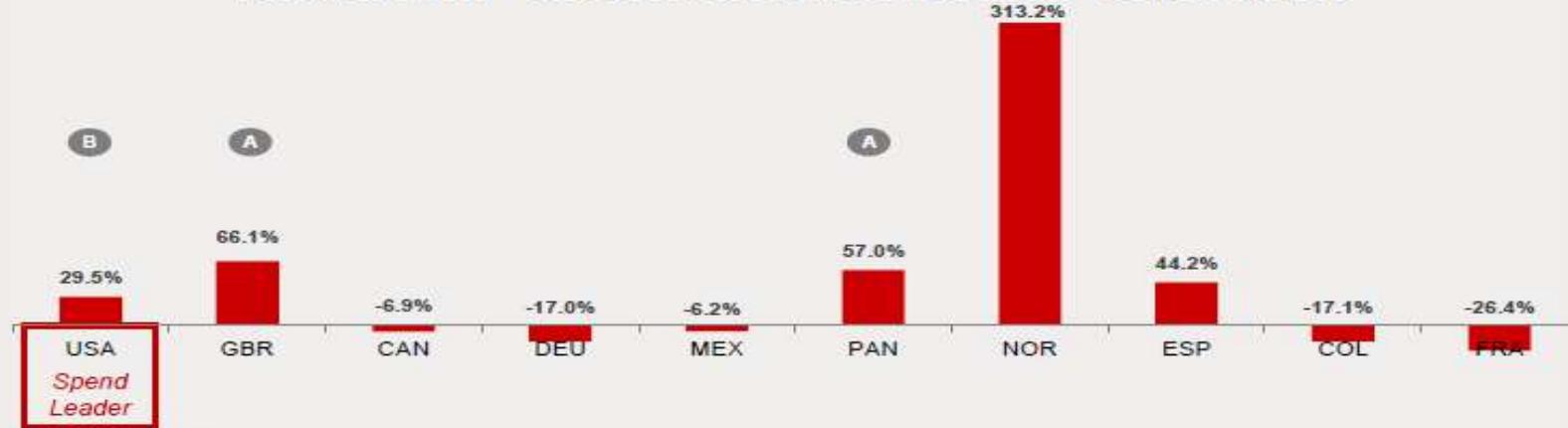


The UK and Panama are among the highest YoY spend growth origination markets in Puerto Rico, followed by the US.

Top peer origination markets for YoY spend growth not on the list for the Caribbean market overall: Mexico, Norway, Spain, and Colombia.

YoY Growth for Top 10 Origination Markets
By Spend

November 1, 2014 – October 31, 2015 vs. November 1, 2015 – October 31, 2016



Key Insights:

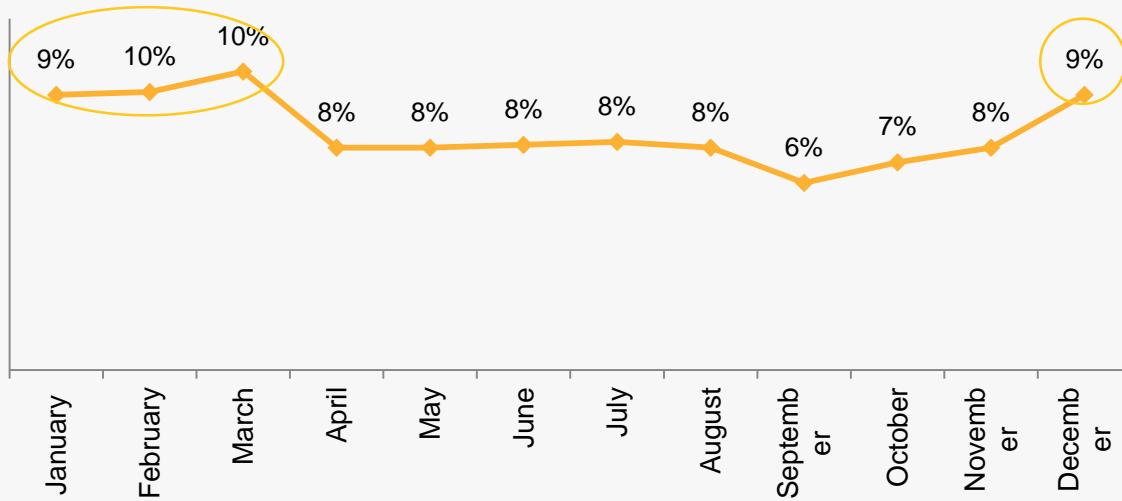
- Average YoY spend growth among top origination markets based on spend is 43.6%.
- A** The UK's YoY growth is ~1.5x higher than average growth, while Panama's is ~1.3x higher.
- B** The modest YoY growth for the US is aligned with the US spend index for Puerto Rico, which indicates spend by visitors from the US is decreasing.

Note: All analysis is subject to Data Usage & Privacy laws by origination Market and Benchmarking Requirements.

Seasonality of International Spend

International traveler spending in Puerto Rico is very seasonal, with the highest from December through March, and consistently lower the rest of the year with a dip in September.

International Customers' Monthly Spend Distribution
Analyzed for the Past 24 Months through Mar 2016



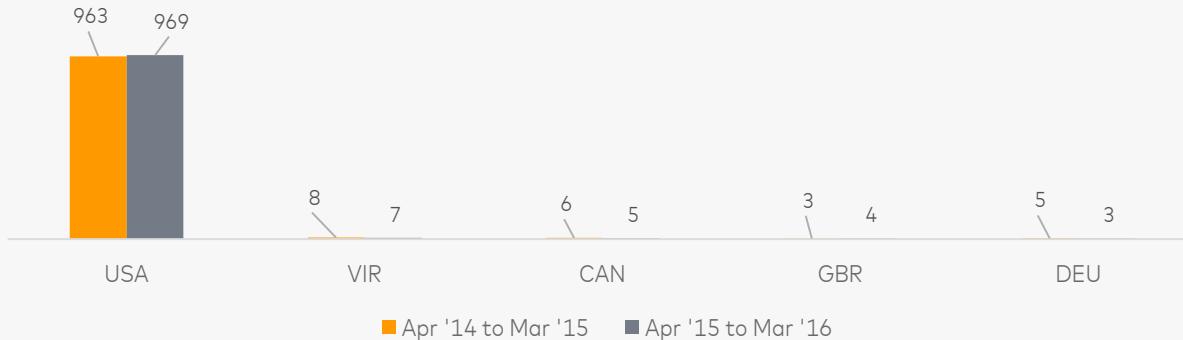
Top 5 Origination Markets based on Spend Index

Almost all international spend in Puerto Rico is from the **United States**, which is not surprising given Puerto Rico is an unincorporated territory of the US.

Top International origination Markets By Spend Index

12 months ending Mar 2015 vs. Mar 2016

*Note: The global
spend index
average is 100.*



Note:

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Top 5 Origination Markets based on Spend Index (ex. US)

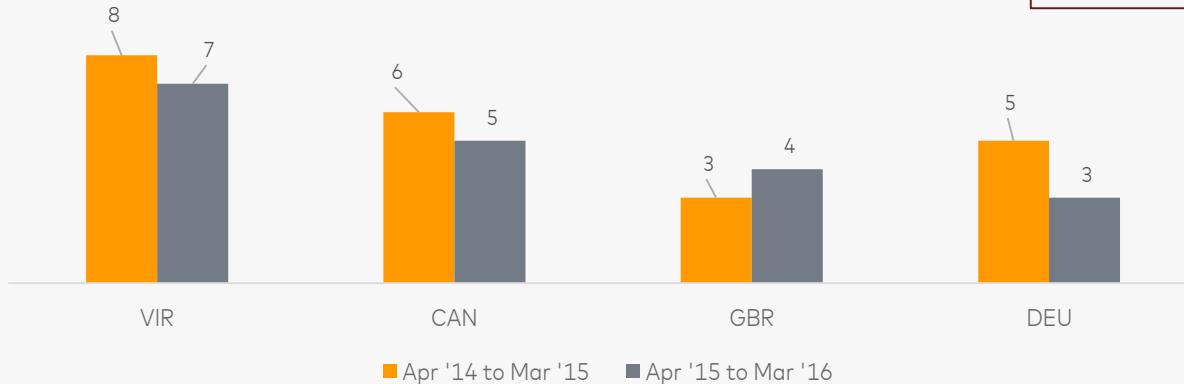
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Outside of the US, the **US Virgin Islands** and **Canada** are the top two countries. However, both have shown a decline vs prior year while the **United Kingdom** has increased.

Top International origination Markets - *Chart Excluding the United States* By Spend Index

12 months ending Mar 2015 vs. Mar 2016

Note: The global
spend index
average is 100.



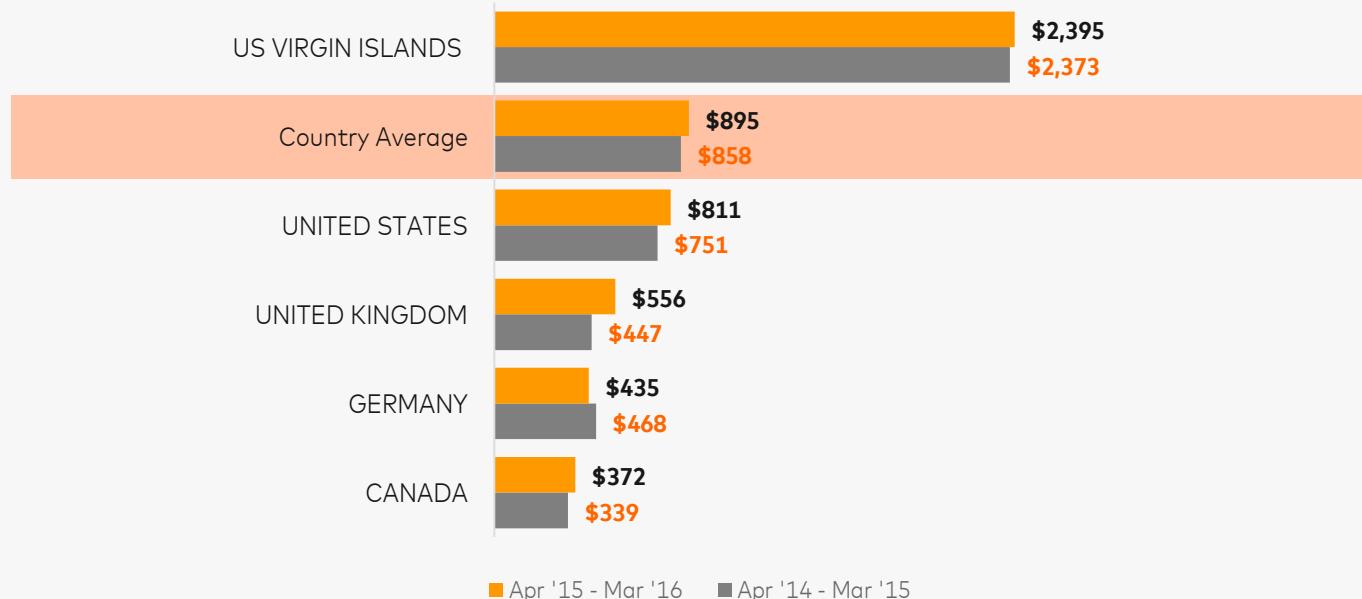
Note:

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Average Spend per Account

While most total spend comes from **United Status** visitors, the average spend per US visitor is below visitors from the **US Virgin Islands**.

Average Spend per Account for Top 5 Merchant Source Markets



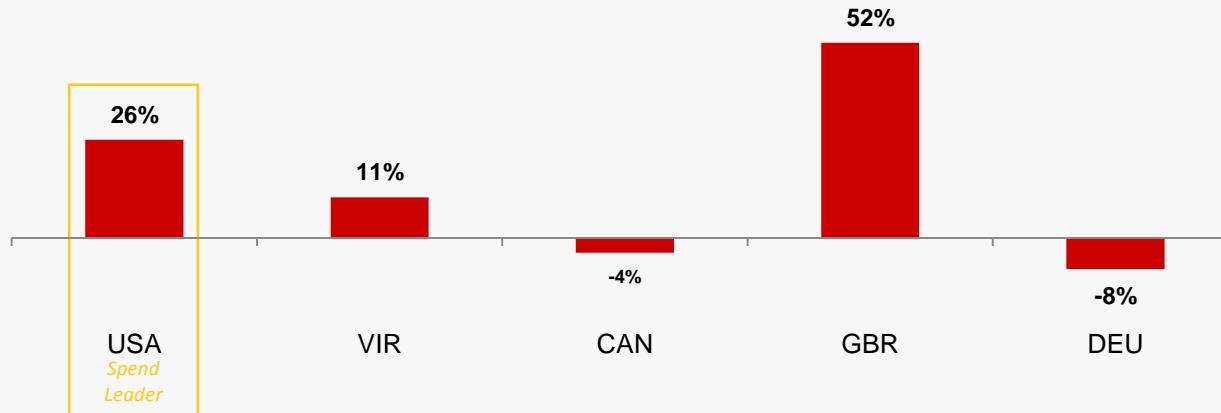
YoY Spend Growth for Top 5 Origination Markets

The United Kingdom has the largest spend growth versus prior year, but the primary source of international spend, the **United States**, is also growing substantially with a 26% increase

YoY Growth for Top 5 Origination Markets

By Spend

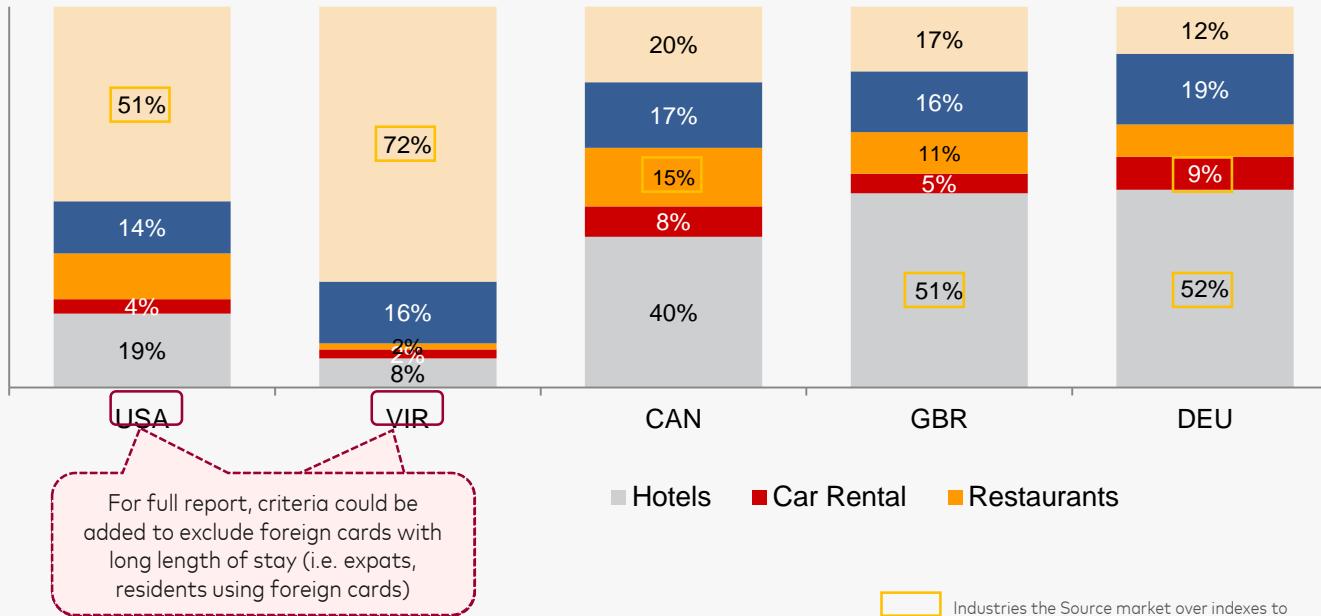
12 months ending March 2015 vs. March 2016



Cross Category Spend by Source Market

Travelers from the **United States and the US Virgin Islands** have a small share of spend in travel related categories indicating many may be longer-term visitors (such as ex-pats). The **United Kingdom and Germany** over index on **Hotel** spend while **Canada** over indexes on **Restaurants**.

Travel-Related Cross Spend Categories for Top Source Markets



The following standard country codes are used in this report:

Code	Country
USA	UNITED STATES
VIR	US VIRGIN ISLANDS
CAN	CANADA
GBR	UNITED KINGDOM
DEU	GERMANY

Los Mercados de Origen son seleccionados por usted:

Country Codes

The following standard country codes are used in this report:

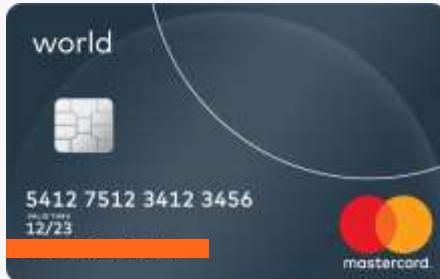
Code	Country
AUS	AUSTRALIA
BRA	BRAZIL
CAN	CANADA
CHL	CHILE
CHN	CHINA
COL	COLOMBIA
CHE	SWITZERLAND
DEU	GERMANY
LUX	LUXEMBOURG
HKG	HONG KONG
SUR	SURINAME
GUY	GUYANA

Code	Country
GBR	UNITED KINGDOM
NOR	NORWAY
MEX	MEXICO
ARE	UNITED ARAB EMIRATES
DNK	DENMARK
IRL	IRELAND
LVA	LATVIA
NLD	NETHERLANDS
PAN	PANAMA
ESP	SPAIN
USA	UNITED STATES
VEN	VENEZUELA

Audiencias

Audiencias es una solución que permite alcanzar a consumidores de alto interés para su destino en el mercado de los EEUU y UK

Billones de Transacciones Agregadas y Anonimizadas



Analizar y Crear Miles de Segmentos



Construir Cientos de Audiencias Únicas



Data Anónima

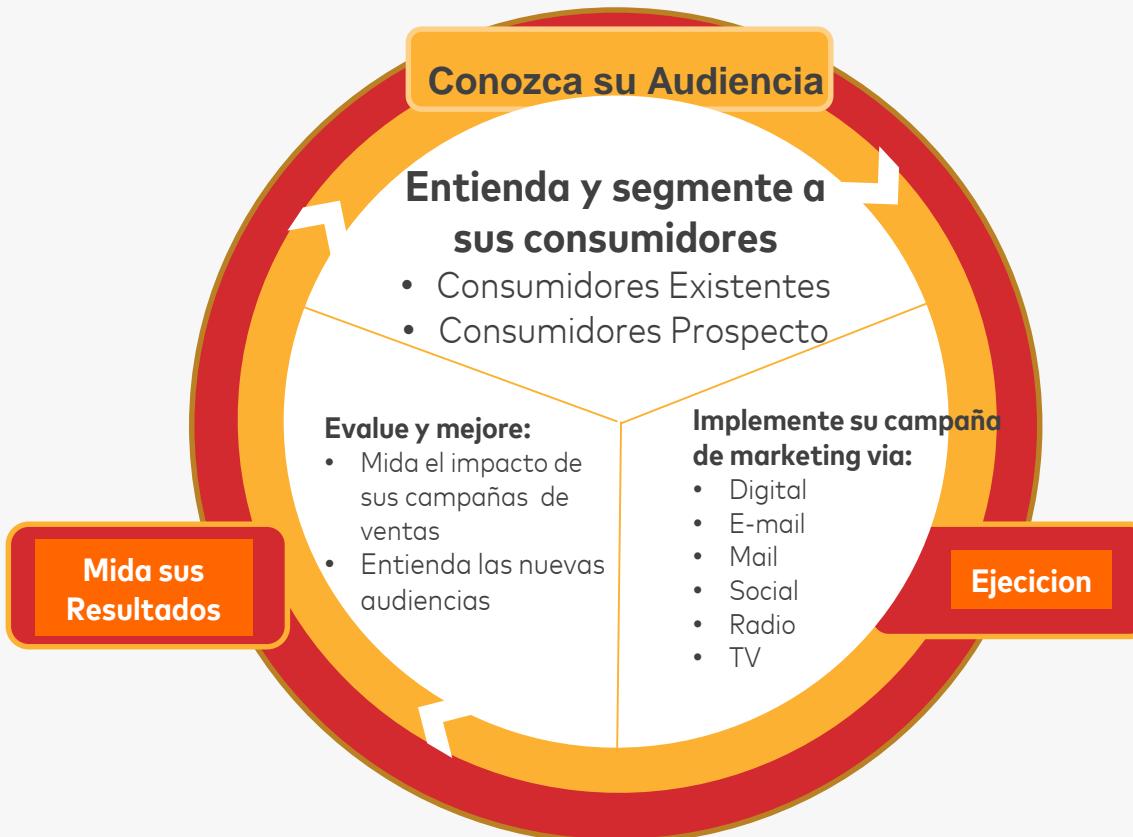
Segmentos Homogéneos

- Propensión a consumo identificada a nivel de segmentos.
- Escalado al total de la población de Estados Unidos.
- Asociada a bases de mercado de terceras partes.

Audiencias

- Los segmentos son agrupados en "audiencias" según la propensión mostrada.
- Ejemplo: propensión a viajar a Puerto Rico en los próximos "n" meses por turismo.

Mastercard ofrece como valor agregado su experiencia, ayudando a cientos de clientes a conocer a sus consumidores, ejecutar para lograr impacto y medir el éxito para una mejora continua.



Legue a sus mejores próximos clientes utilizando "Audiencias" de Mastercard Advisors.

¿Qué valor proporciona Audiencias?



- Capacidad de alcanzar sus mejores prospectos usando los modelos de propensión diseñados por MasterCard, incorporando aquellos que probablemente comprarán en X categoría y / o tendrán una propensión a comprar de nuevo en los próximos 30-90 días
- Los modelos se ajustan al universo total de consumo de los Estados Unidos & UK y están además integrados con datos de terceros para crear una lista de prospectos únicos personalizados
- Segmentos estándar disponibles o customizados según necesidad del cliente.
- Flexible para aplicaciones amplias en correo digital, Facebook, TV, y correo directo.

Las Audiencias pueden ser construidas a su medida o se pueden utilizar audiencias ya estandarizadas y probadas

Restaurants

Fine Dining
Mid Scale Restaurants
Casual Chain
Fast Food
Pizza Restaurants
Ice Cream Places
Coffee Shops

Grocery + Drug

Grocery Stores
- Organic
- National Chain
Drug Stores

Apparel

Children's Apparel
Family Apparel
Men's Apparel
Women's Apparel
Woman's/Men's Luxury Apparel

Entertainment

Movies
Pro Sports
Concerts/Ticket Vendors
Theme Parks
Subscriptions- Audio and/or Video
In-app Purchases

Accommodations

Upscale Hotel/Resorts
Midscale Hotel
Extended Stay
Hotel/Motel
Casino

Department/Retail Stores

Department Stores
Discount Stores
Home Furnishings
Gift Homes
Office Supplies
Home Improvement
Sporting Goods/Apparel/Footwear

Automotive

Automotive New and Used Car Sales
Automotive Retail
Automotive by top 5 MSA

Electronics

Consumer Electronics/Applications
Computer/Software Stores
Camera/Photography Supplies

Travel

Domestic Air
International Air
Cruise Travel
Car Rentals
Train
Upcoming International Travel
Travel Agencies / Tours

Other

Luxury Retailers
Mega Stores
Online Dating Communities
Pet Services
Education related
Accounting & Legal Services

Existing Index

Discretionary Spend Index

Telco

Wireless
Cable



Usted puede definir los tipos de Audiencias que quiere seleccionar para su destino:

- Gasta 2X veces o más que el promedio en la categoría, Ej. Restaurantes, Hoteles, Joyería, etc.
- Probabilidad de comprar en los próximos 30-90 días en X categoría.
- Comportamiento de compra anterior específico.
- Perfil específicos de los clientes, según gasto o demografía.
- Muestra probabilidades de comprar o comportamiento específico de gasto futuro.
- Detectar si ha existido algún evento que ha generado cambio en su comportamiento de gasto, ej: Mejora en su crédito, presencia de hijos, etc.



Jet Blue; Caso de Estudio

Estrategia

- Geo-delimitación por código postal de residencia, aeropuerto, etc.
- Llegue a los usuarios que realizan transacciones en las ubicaciones donde se encuentran terminales de Jet Blue en USA.
- Identificar a los usuarios que pagan tarifas de equipaje en bodega.
- Viajeros por temporadas.



Segmento	Objetivo	Descripción
Prospectos : US a El Caribe	Ventas Verticales	Detectar posibles Turistas que viajaran los próximos 30 -60- 90 días al Caribe

Visitanos en :

www.mastercardadvisors.com/solutions



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