

PRESENTED BY: CHARTER ITINERARY

# Emerging Trends in Global Charter Destinations

A MACRO OUTLOOK





# Trends Within Established Charter Destinations

2022 - 2024

Macro Outlook

## Mediterranean

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We see a clear downward trend in popularity of **West Med** as a region, with a **11% drop** in number of itineraries created over the period 22-24.

Conversely, we see a **20% increase** in the popularity of **East Med** as a region over the same period, driven primarily by a **20% increase** in the number of itineraries created for **Croatia**, closely followed by **Greece** and **Turkey**.

## US S.E coast, Bahamas, Caribbean

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Generally, the region as a whole has remained stable over the period, however, we see a sharp **increase of 55%** in itineraries created for the US East Coast (Florida) and a **15% decrease** for the **Bahamas**.

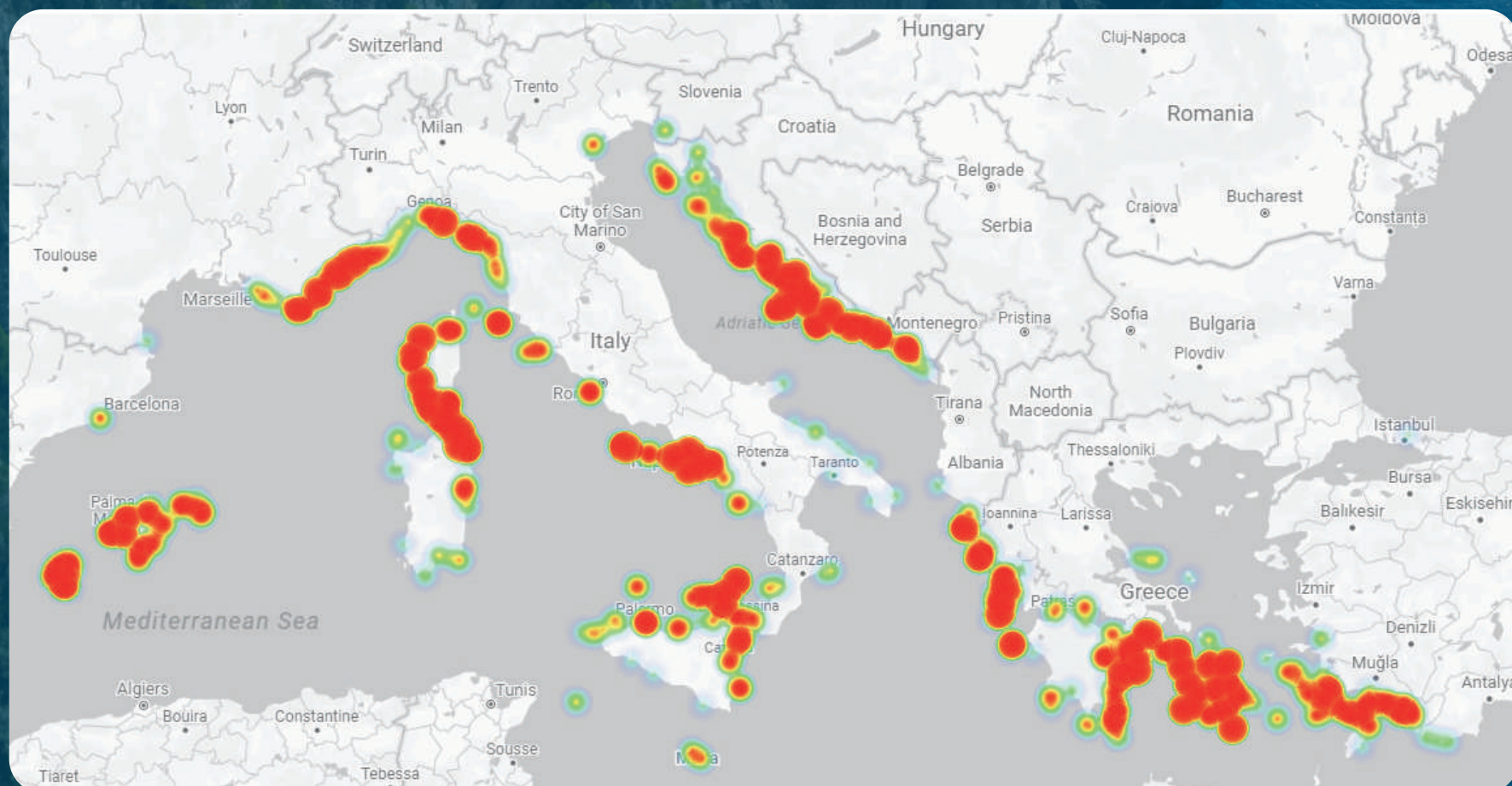




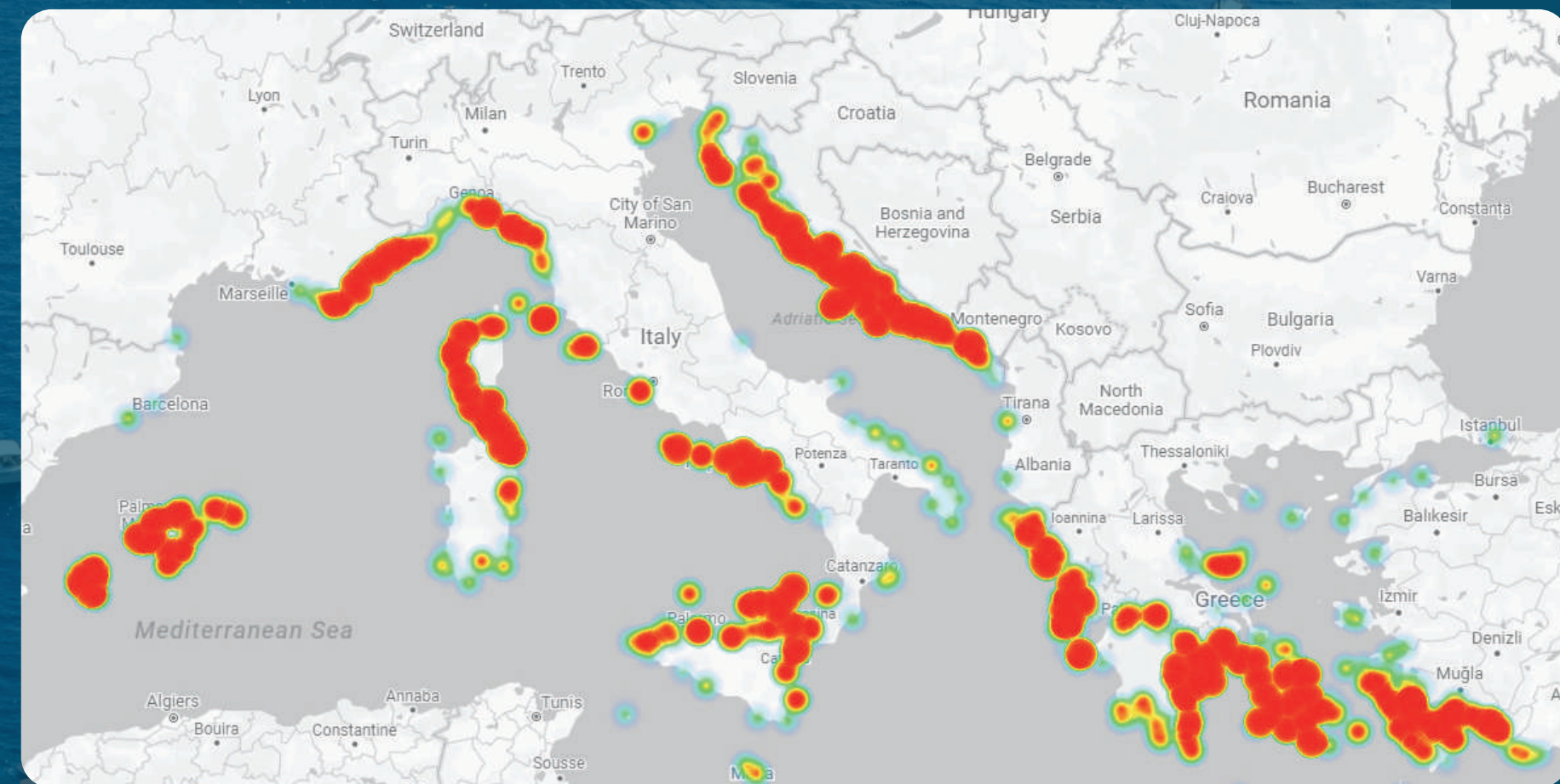
# 2022 vs 2024 Summer Season in West vs East Mediterranean

## Macro Outlook

2022



2024



- West Mediterranean region sees 11% drop in Itinerary creation (2022-2024).
- East Mediterranean region sees 20% Increase in activity (2022-2024), led primarily by Croatia.

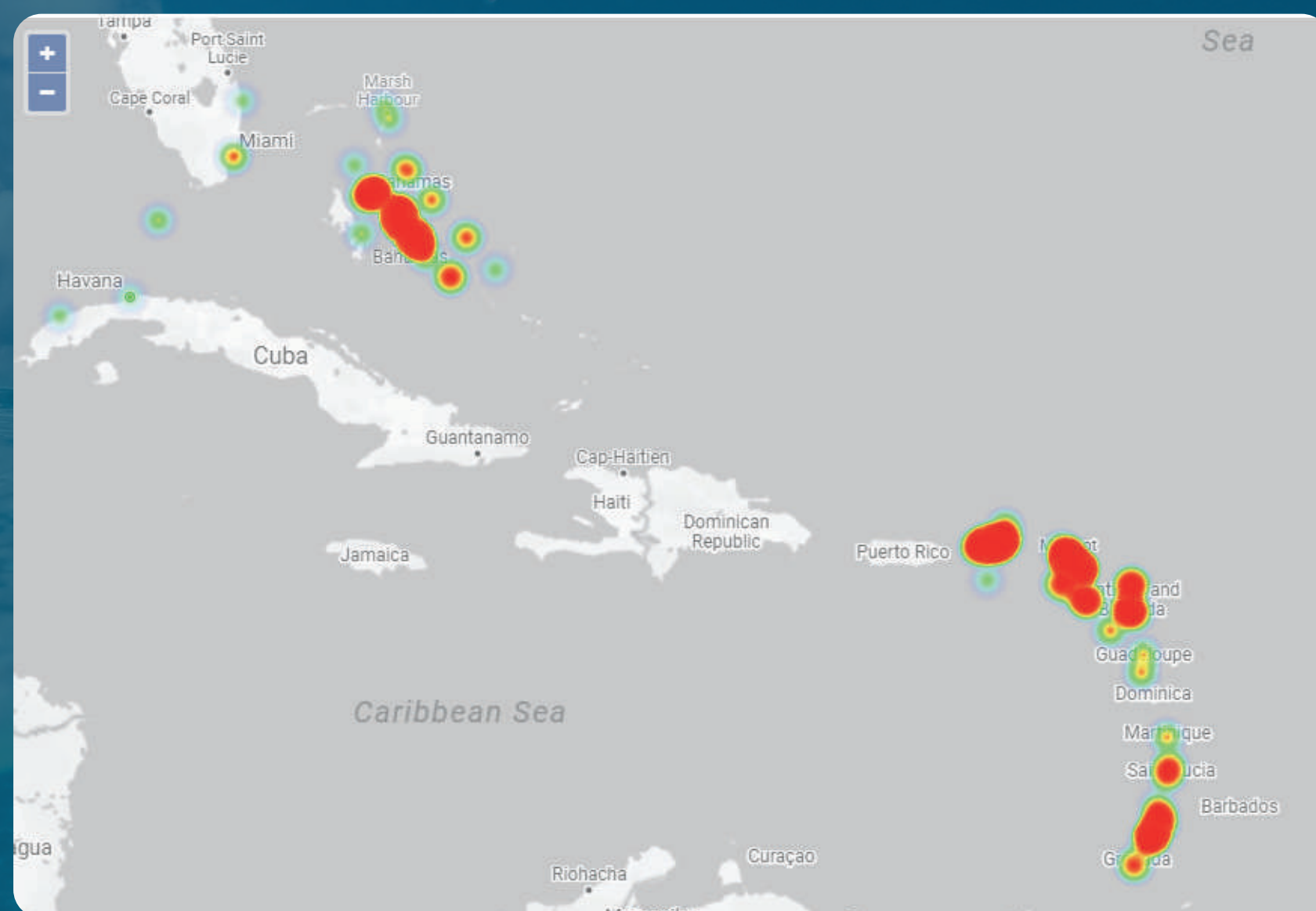




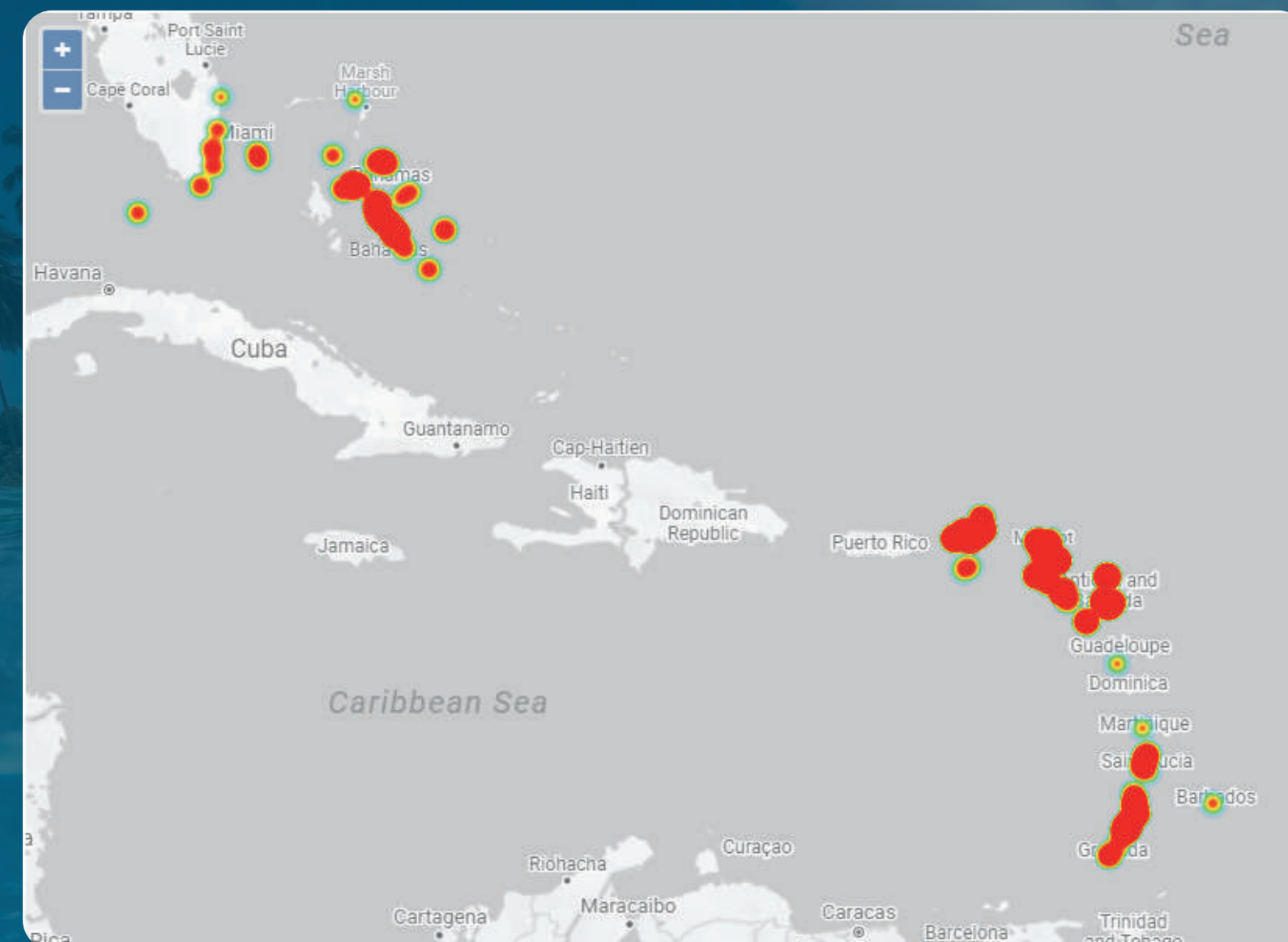
# 2022 vs 2024 Winter Season in US S.E Coast, Bahamas & Caribbean

## Macro Outlook

2021 - 2022



2023 - 2024



- US South East Coast (Florida) sees 55% increase in number of itineraries created, whilst Bahamas declines by 15%



# Trends of Emerging Charter Destinations

2022 - 2024

## Macro Outlook

Emerging charter destinations have been defined below, with corresponding indication of growth/decline in number of itineraries created for each region over the period 2022 to 2024 and primary drivers thereof:

### Central America

↓ 18%

### Pacific Islands

↓ 9%

### Northern Europe

↑ 6%

### Australia and NZ

↑ 29%

### SE Asia

↑ 33%

### Middle East

↑ 31%

### Indian Ocean

↑ 21%

There is a clear trend - Eastern shores are drawing growing interest from charter clients away from the Western Hemisphere.





# Emerging Destinations Showing Decline Over The 2022 vs 2024 Seasons

Macro Outlook

Central America

2022 - 2023



2023 - 2024



Central America

↓ 18%





# Emerging Destinations Showing Decline Over The 2022 vs 2024 Seasons

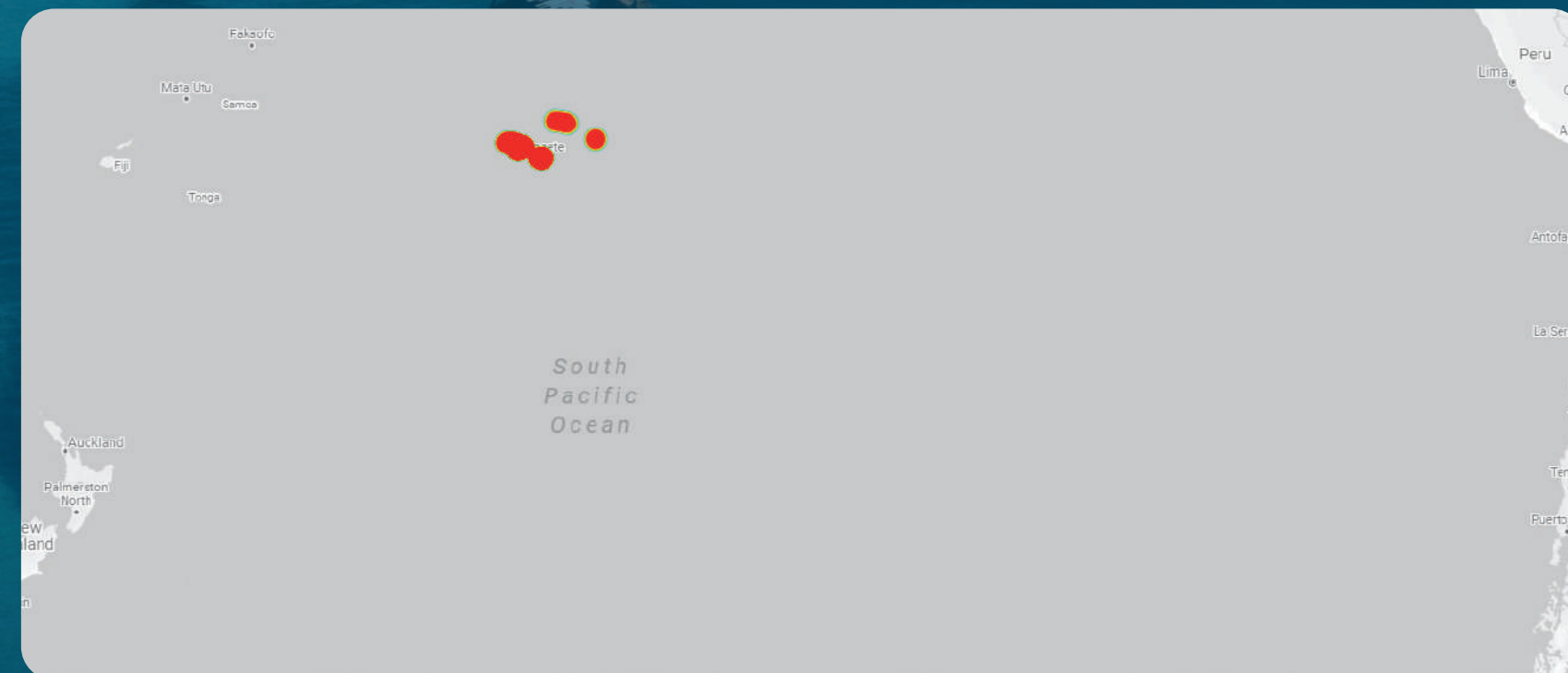
Macro Outlook

## Pacific Islands

2021 + 2022



2022 + 2023



Pacific Islands

↓ 9%



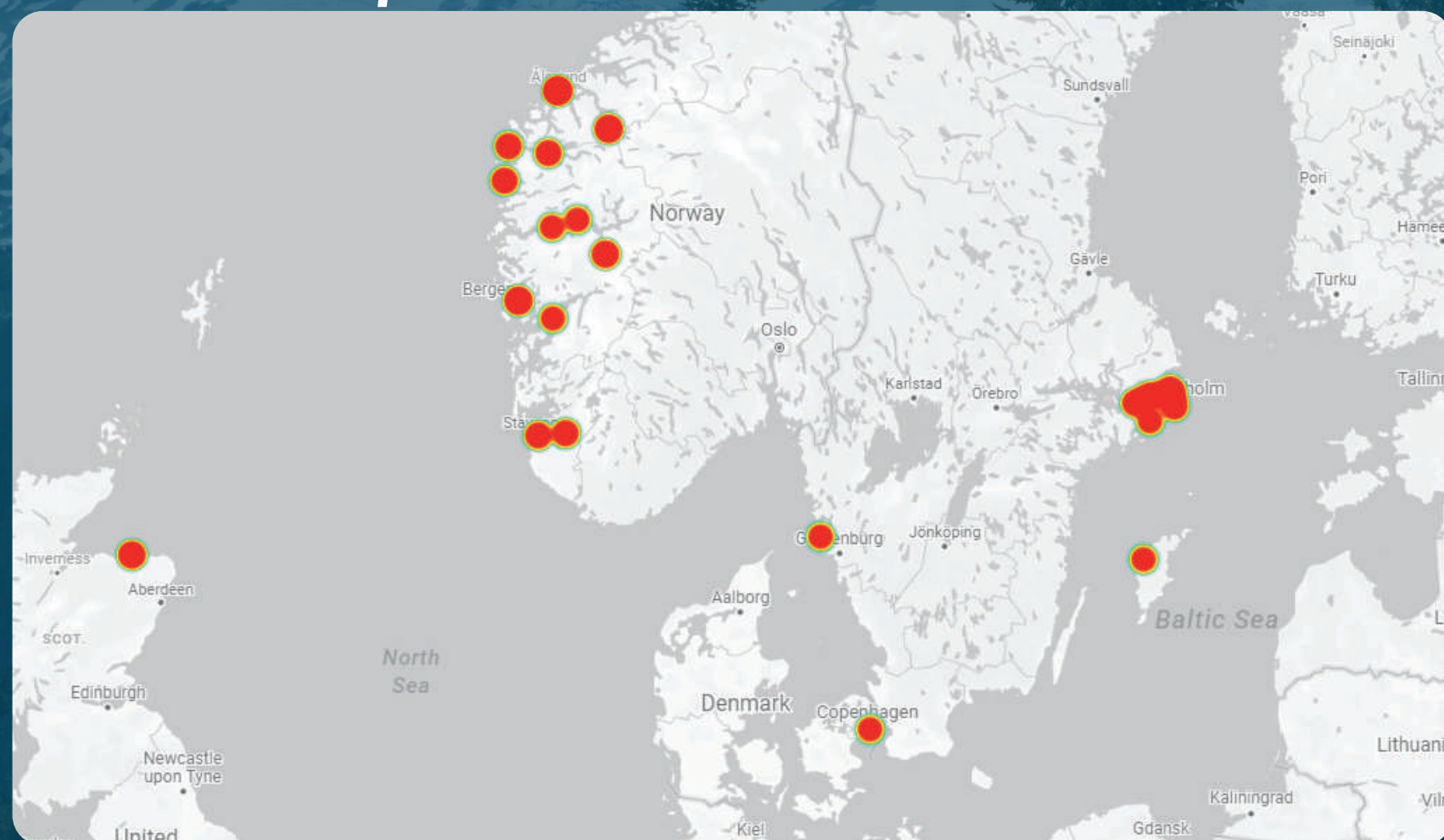


# Emerging Destinations Showing Growth Over The 2022 vs 2024 Seasons

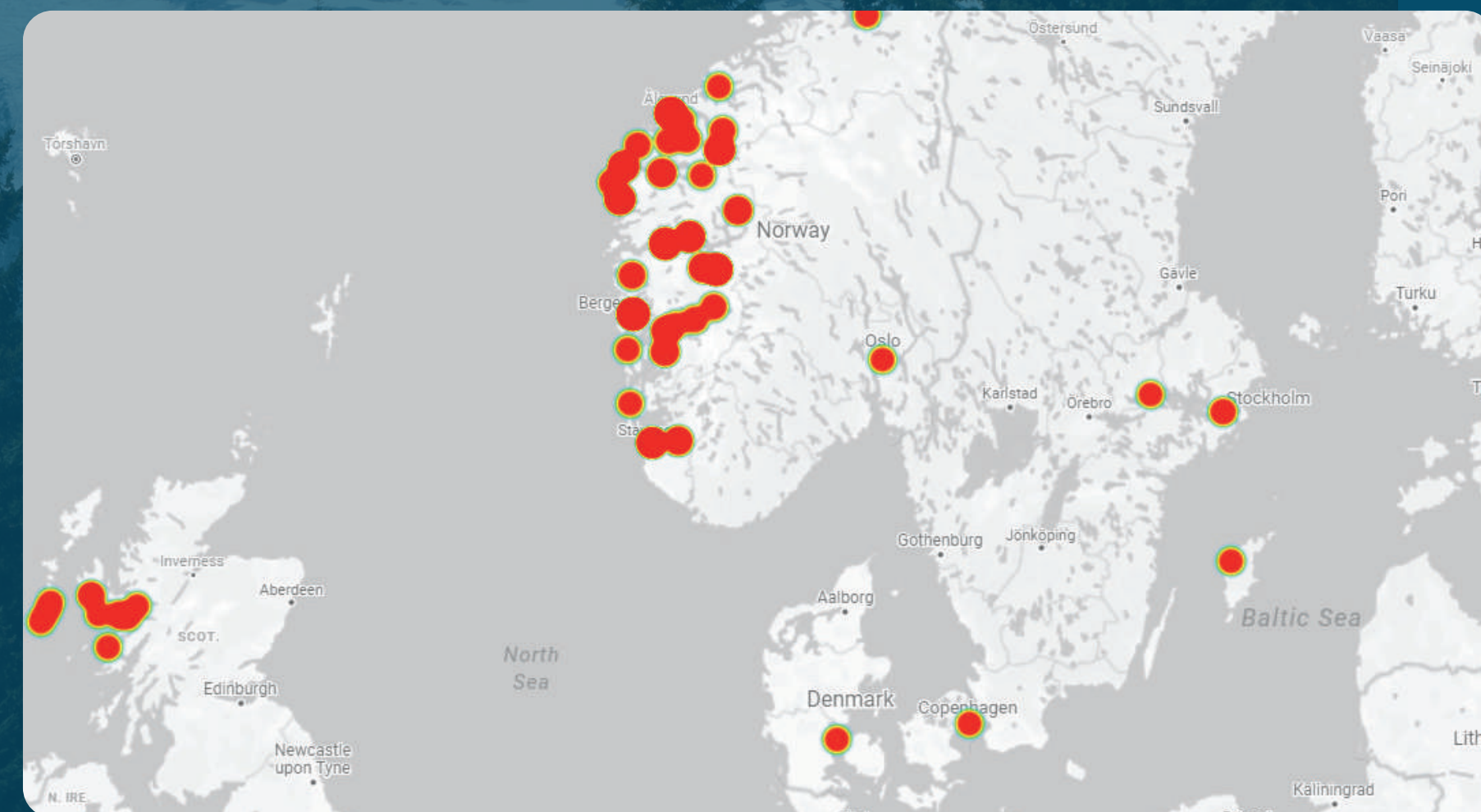
Macro Outlook

Northern Europe

2021 + 2022



2023 + 2024



Northern Europe

↑ 6%





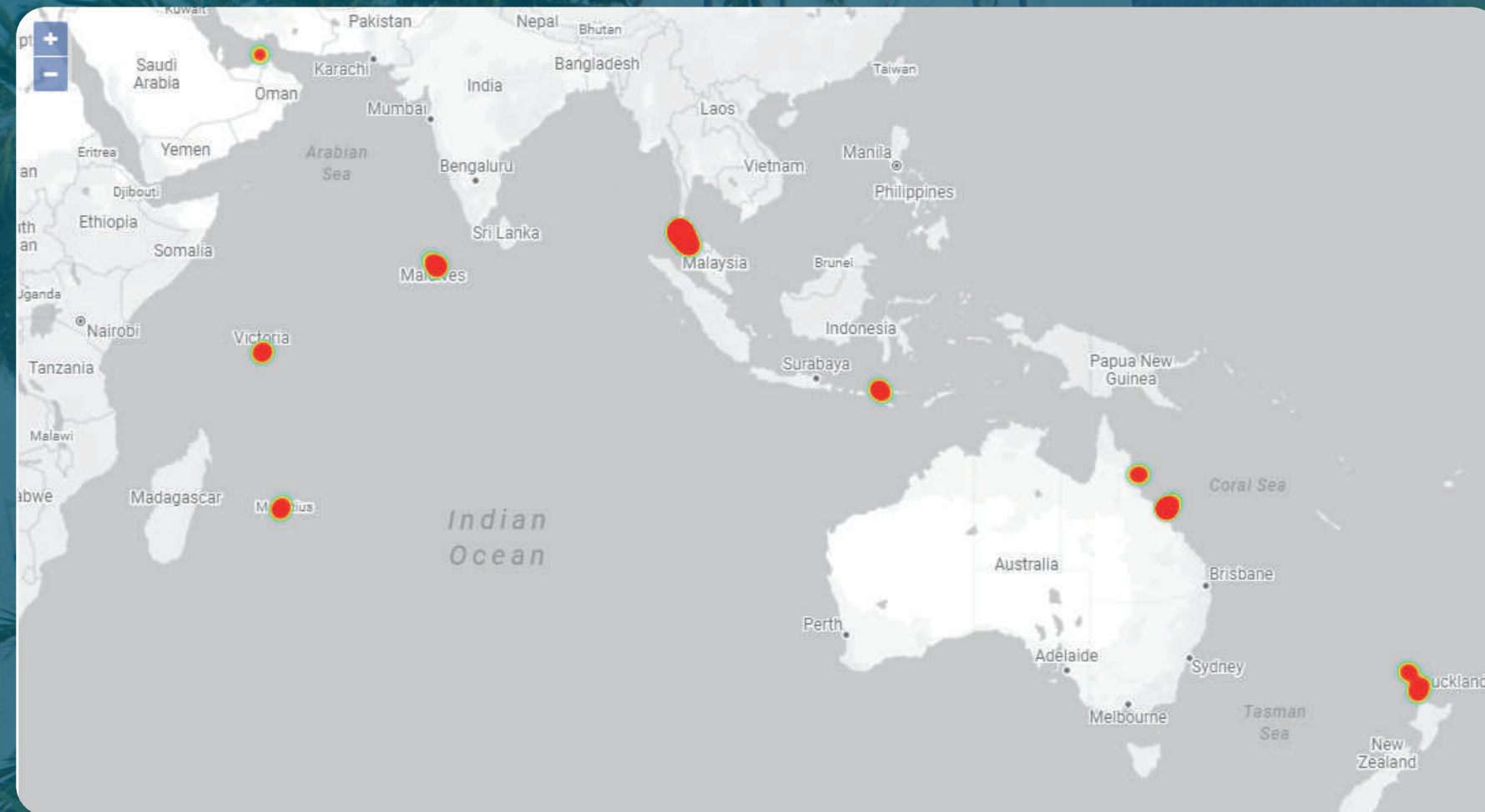
# Emerging Destinations Showing Growth Over The 2022 vs 2024 Seasons

Macro Outlook

*Eastern Hemisphere*

2021 + 2022

2023 + 2024



Australia and NZ

↑ 29%

SE Asia

↑ 33%

Middle East

↑ 31%

Indian Ocean

↑ 21%





An aerial photograph of a tropical beach. The water is a vibrant turquoise color, and the sand is a light beige. Several small boats are anchored in the shallow water. There are people swimming and standing on the beach. The text "THANK YOU FOR LISTENING" is overlaid on the right side of the image in a large, white, sans-serif font.

# THANK YOU

FOR LISTENING

