

DISCOVER
Puerto Rico

DiscoverPuertoRico.com



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Puerto Rico

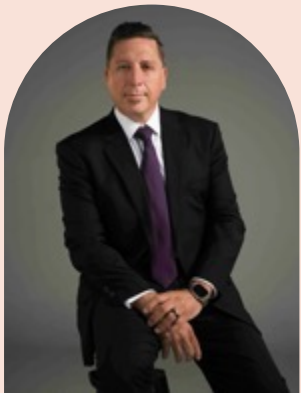
Discover Puerto Rico March Industry Update

MARCH 11, 2026

Translation available
upon request

Agenda

01



JORGE L. PÉREZ

Chief Marketing
Officer

02



STROM TUSSEY

Chief Marketing
Officer

03



GLORIANNA YAMIN

Vice President of
Marketing

04



LARESSA MORALES

Director of
Research &
Analytics

05



ED CAREY

Chief Sales
Officer

06



VANESSA FIGUEROA

Destination
Experience
Senior Director



Welcome Remarks

JORGE L. PÉREZ

Chief Executive Officer



Destination Marketing & Communications

STORM TUSSEY

Chief Marketing Officer

Super Bowl

UPDATE

SUPERBOWL RECAP

3 BILLION IMPRESSIONS

- Our Super Bowl activation, "The Plena Game Day Report," has successfully moved the needle from broad awareness to high-authority brand engagement.
- By leveraging a multi-channel approach—combining top-tier press distribution, the celebrity influence of Victor Cruz, and targeted Hispanic media via Telemundo—we have generated over 1 billion impressions to date.
- This massive "Halo Effect" has secured \$17.7M in Media Value, demonstrating that our holistic 360 campaign did not just reach audiences but was organically amplified by credible national and niche publications.
- Estimated Paid Media Value:
 - Despite the "Super Bowl Premium" (where CPCs typically spike by 4x), our high 4.24% CTR kept our effective CPC significantly below the Q1 industry average for entertainment & travel.
 - For every \$1.00 invested in paid media, the campaign generated an estimated \$5.50 in total media impact.

+245%

**Flight searches
to Puerto Rico**

*Expedia, Feb 8-11 vs. prior
year*

537K

**Discover PR
website visitors**

+16% month-over-month

+1,550%

**"Puerto Ricans
American citizens"**

*Google search surge post-SB
LX*

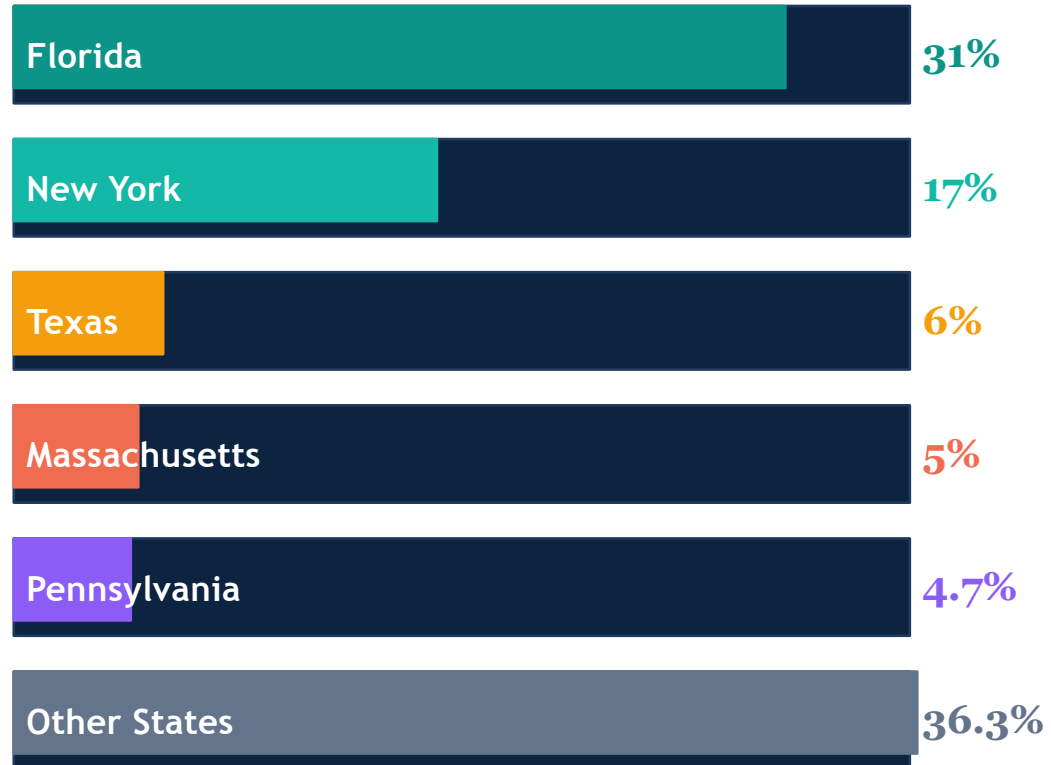
+1,450%

**Flight searches
to Vega Baja**

Bad Bunny's hometown spike

Three cultural catalysts drove an unprecedented surge in Puerto Rico awareness, curiosity, and travel intent during this 31-day period.

Baseline Origin Markets (Air Passengers)



Source: Discover Puerto Rico Visitor Research

Fastest-Growing NEW Markets

Post-Super Bowl growth vs. prior year (Discover Puerto Rico)

Kentucky +26%

Georgia +23%

Minnesota +21%

Ohio +19%

Virginia +19%

These emerging markets signal untapped audience growth beyond the traditional Puerto Rican diaspora in FL and NY.

+240%

San Juan

Capital city, Old San Juan, beaches, nightlife

Core travel destination – sustained elevated demand

+1,450%

Vega Baja

Bad Bunny's hometown – coastal charm, beaches

Breakout destination, previously low baseline

Rising

Ponce

Carnaval de Ponce (Feb), cultural travel

Redirected by Discover PR campaign

Rising

El Yunque

Rainforest ecotourism, ArteYunque 2026

Nature + culture overlap growing

Stable

Mayagüez

University city, west coast, seafood

Strong local/regional origin market

Rising

Culebra / Vieques

Remote island beaches, off-the-beaten-path

Growing among adventure travelers post-SB

Awaken Your Senses



NEW CAMPAIGN LAUNCH





Female Audience



VIDEO

MUJERES

AUDIENCIA

- Impulsadas por un profundo deseo de renovación emocional y reconexión consigo mismas.
- No buscan simplemente escapar de la rutina diaria; son viajeras conscientes que priorizan experiencias capaces de generar transformación personal y despertar los sentidos, por encima de adquisición material.
- El 82% de quienes toman decisiones sobre viajes son mujeres.
- Para 2028, las mujeres controlarán el 75% del gasto discrecional.
- En 2025, el 58% de las personas que viajaron a Puerto Rico fueron mujeres.







Boricua Bridge

VIDEO

CONEXIÓN BORICUA

AUDIENCIA

- Motivados por una búsqueda profunda de aceptación plena y reconexión cultural.
- Buscan reconectar con sus raíces, priorizando experiencias que les permitan celebrar la riqueza y complejidad de su identidad latina.
- En Estados Unidos viven 6 millones de boricuas y más de 64 millones de hispanos.
- Entre los principales mercados internacionales se encuentran Colombia, México y España.







Bespoke Adventurer

VIDEO

AVENTURAS DE LUJO

AUDIENCIA

- Busca un entorno dinámico que estimule su curiosidad.
- Para este viajero, el lujo no se define por lo ostentoso, sino por experiencias exclusivas, acceso privilegiado y guías expertos que le permitan descubrir la riqueza cultural y explorar más allá de lo convencional.
- Valora el autodescubrimiento que se da conectando genuinamente con el destino, asegurando que cada viaje sea único y de alta calidad.
- Este segmento se caracteriza por tener los ingresos más altos.
 - El mercado global de turismo de aventura fue valorado en \$804.51 mil millones en 2024.
 - Se proyecta que alcance \$1.7 billones para 2032.







Local Partners



SHOWCASE

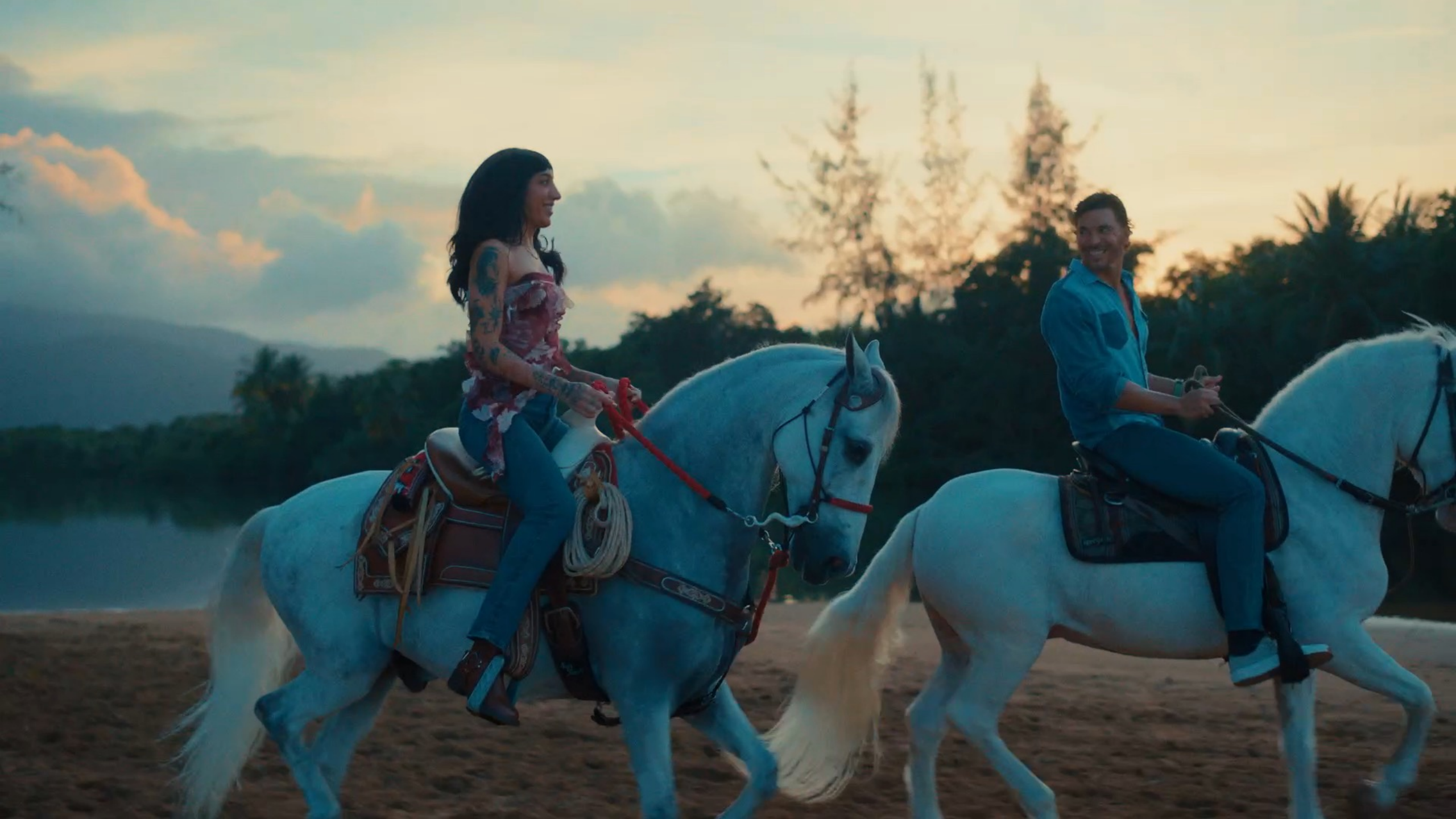


Awaken
your senses

PARTNERS

Behind the Scenes POV

VIDEO





Research

LARESSA MORALES

Director of Research & Analytics

Industry Results

2025 - 5TH CONSECUTIVE RECORD YEAR!

GROWTH OBSERVED ACROSS ALL SEGMENTS AND INDUSTRY



AIR PASSENGERS

+2%



LODGING REVENUE

+7%



LODGING DEMAND

+8%



CRUISE PASSENGERS

+12%



ROOM TAX COLLECTIONS

+8%

2025 VISITORS

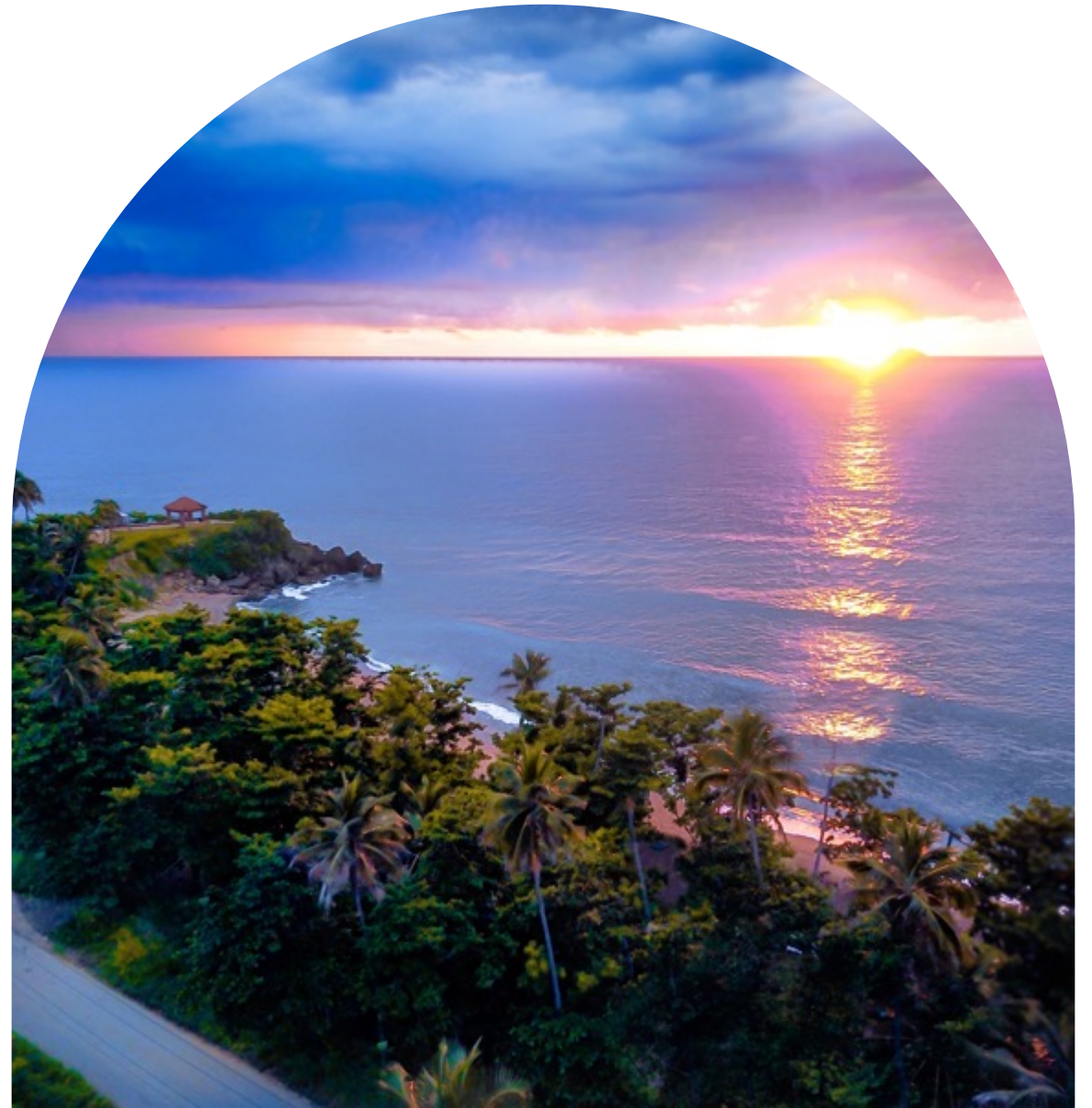
NON-RESIDENT VOLUME & SPEND



8.1
Million



\$8.2
Billion



INDUSTRY METRICS - JAN 2026

DESPITE FEWER ARRIVALS, LODGING AND CRUISE ARE OFF TO A GREAT START



SJU AIR PASSENGERS

-2%

VS. 2025



LODGING DEMAND

+10%

VS. 2025



LODGING REVENUE

+8%

VS. 2025



CRUISE PASSENGERS

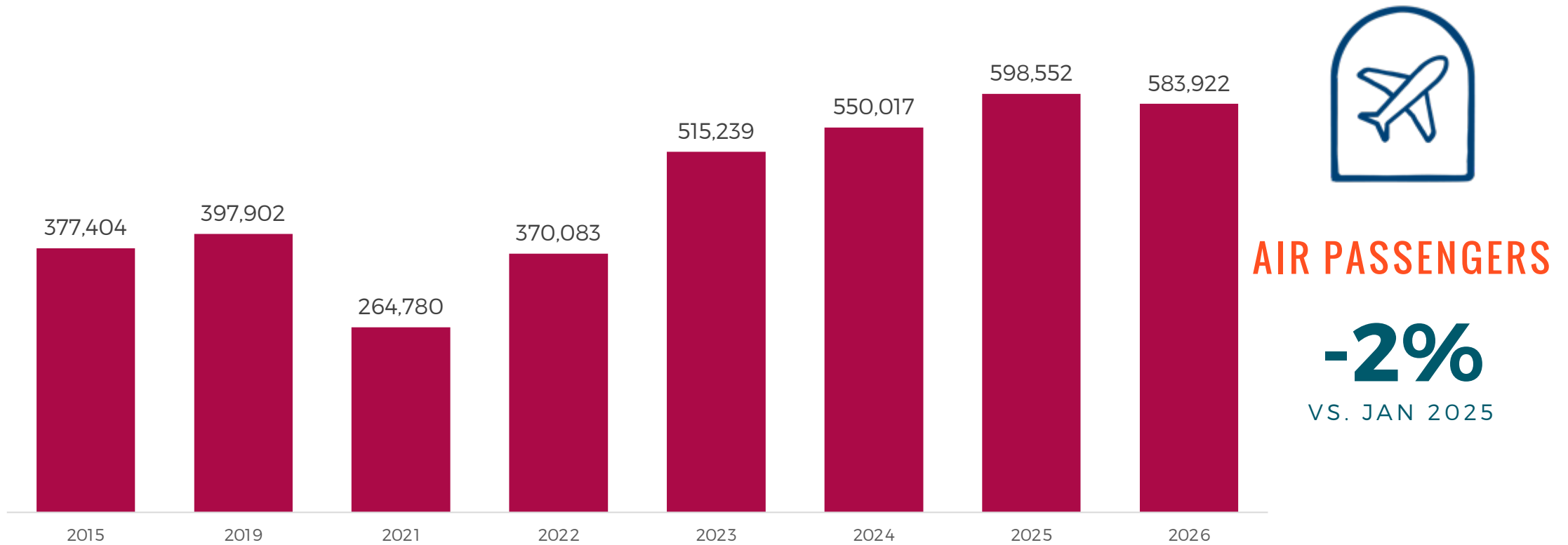
+25%

VS. 2025

LOWER CAPACITY DRIVES FEWER ARRIVALS

INCREASES IN EUROPE AND SOUTH AMERICA PARTIALLY OFFSET DECLINES FROM NORTH AMERICAN AND CARIBBEAN

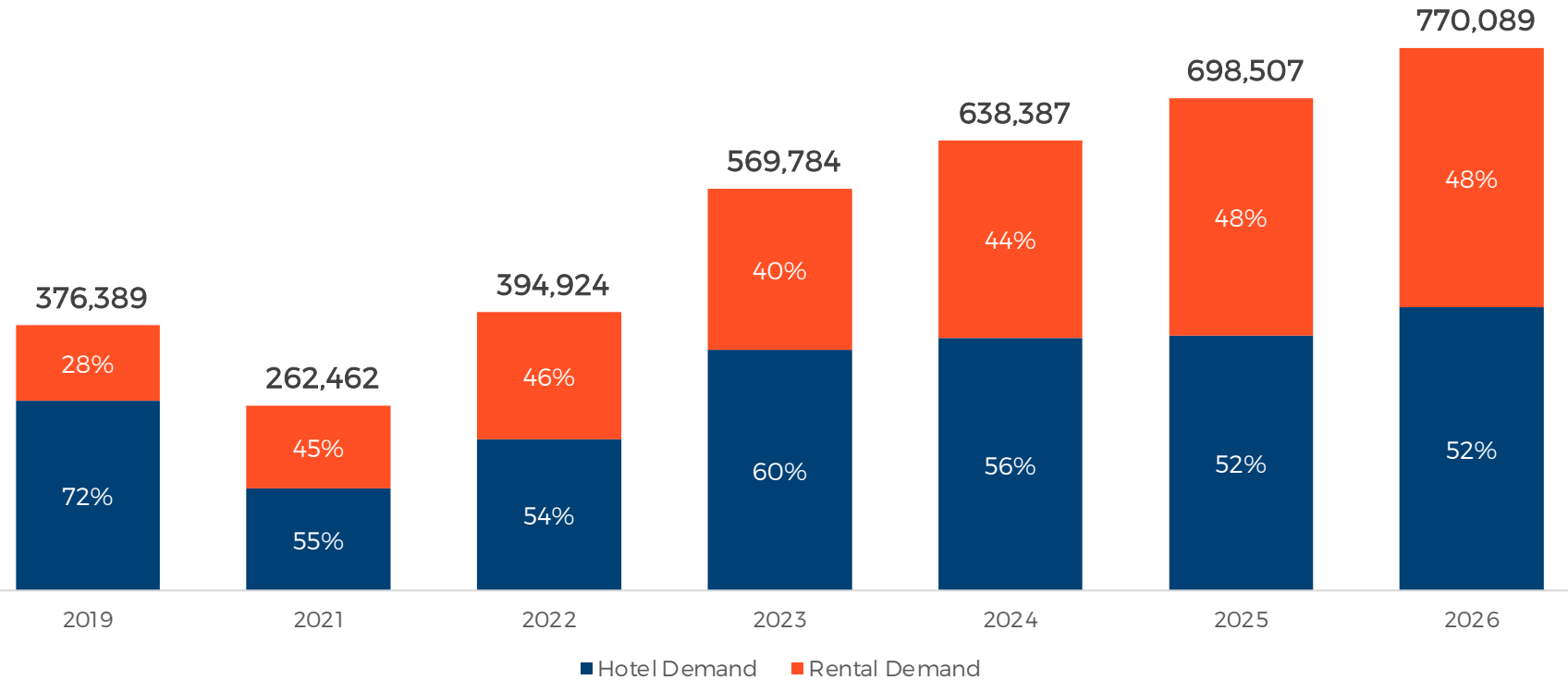
SJU Arrivals
(January)



LODGING DEMAND REMAINS STRONG

HOTEL DEMAND INCREASED 11% AND RENTAL NIGHTS BOOKED 9%

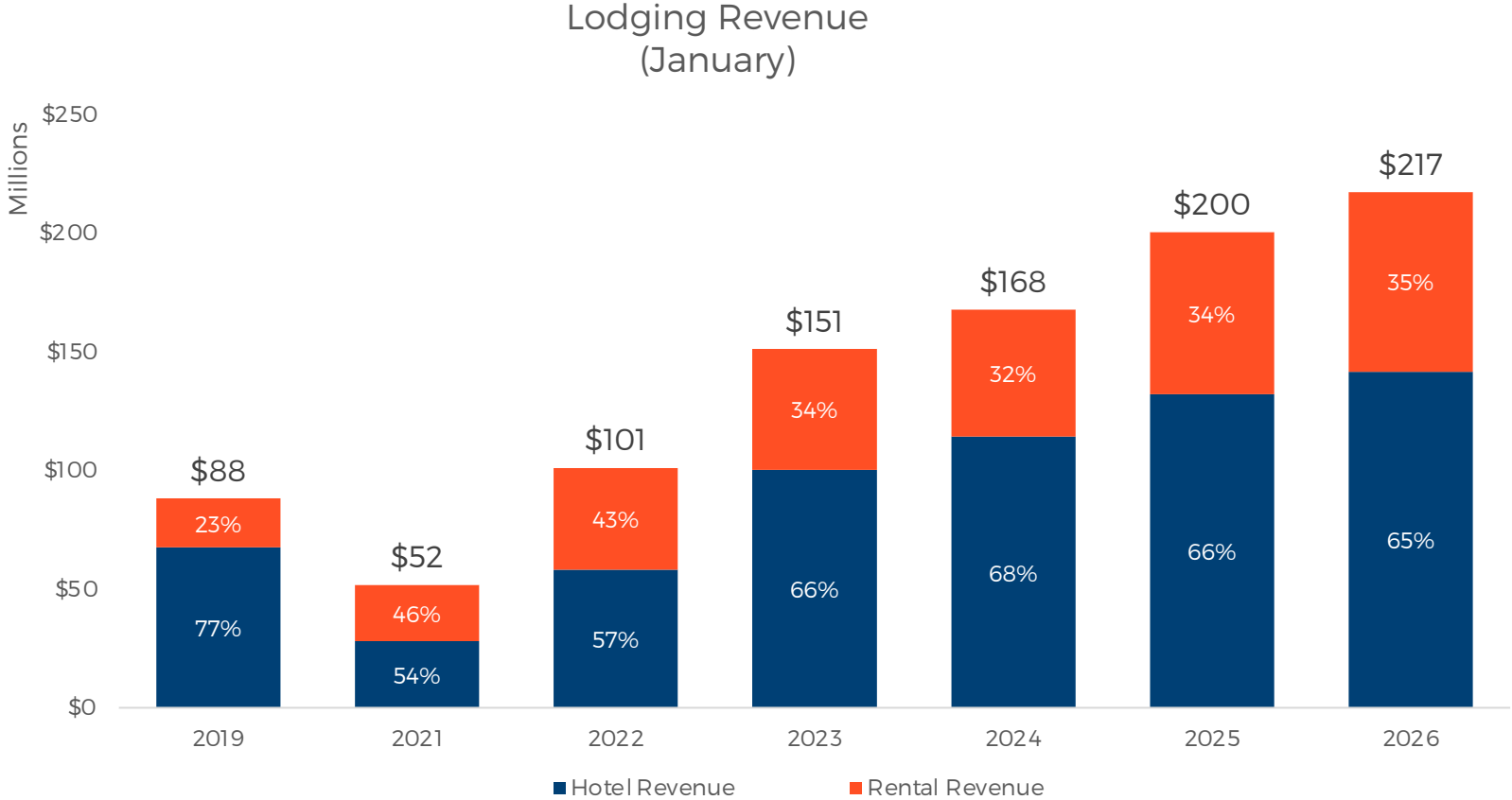
Lodging Demand
(January)



+10%
VS. JAN 2025

AS DOES LODGING REVENUE GROWTH

STRONG RENTAL DEMAND AND HOTEL RATES CONTRIBUTE TO NEW RECORD REVENUE

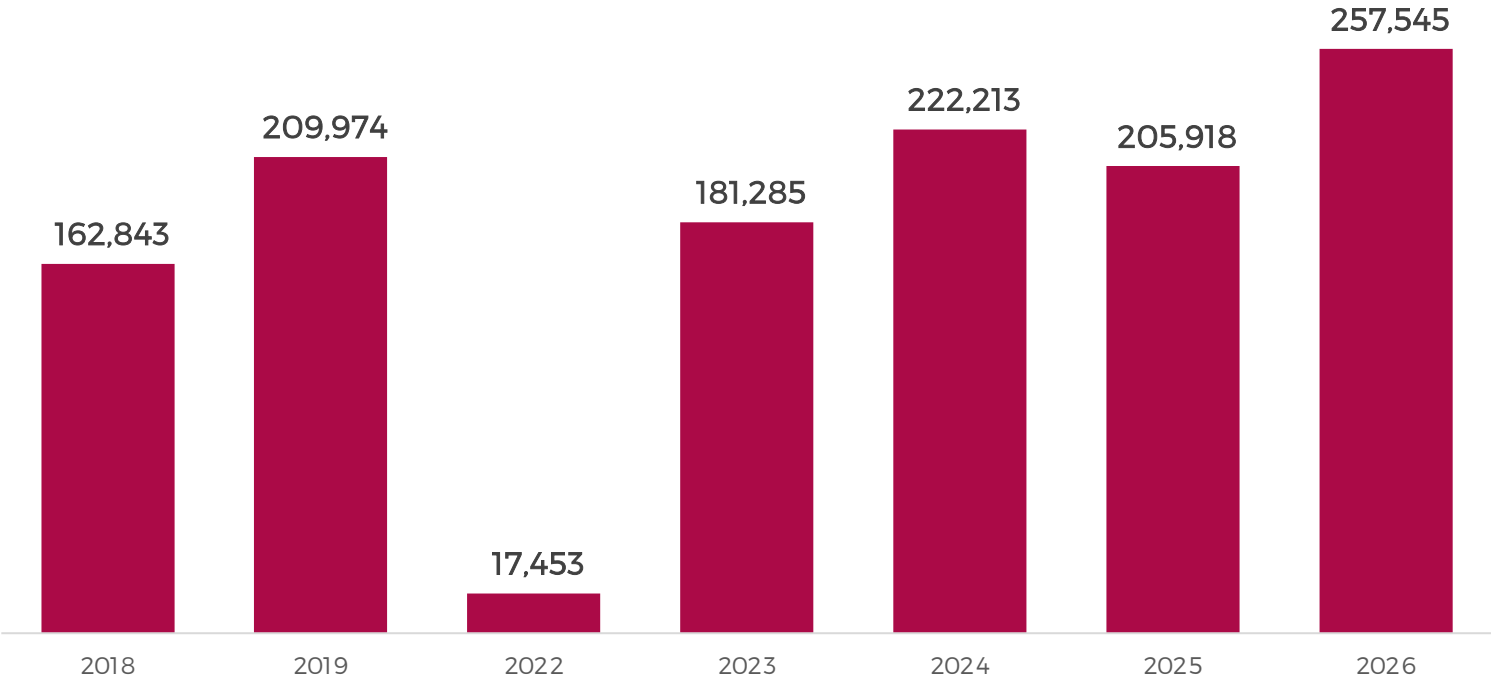


+8%
VS. JAN 2025

CRUISE ARRIVALS IN SAN JUAN INCREASE BY 51K

25% MORE CRUISE PASSENGER ARRIVALS IN JANUARY

San Juan Cruise Passenger Arrivals
(January)

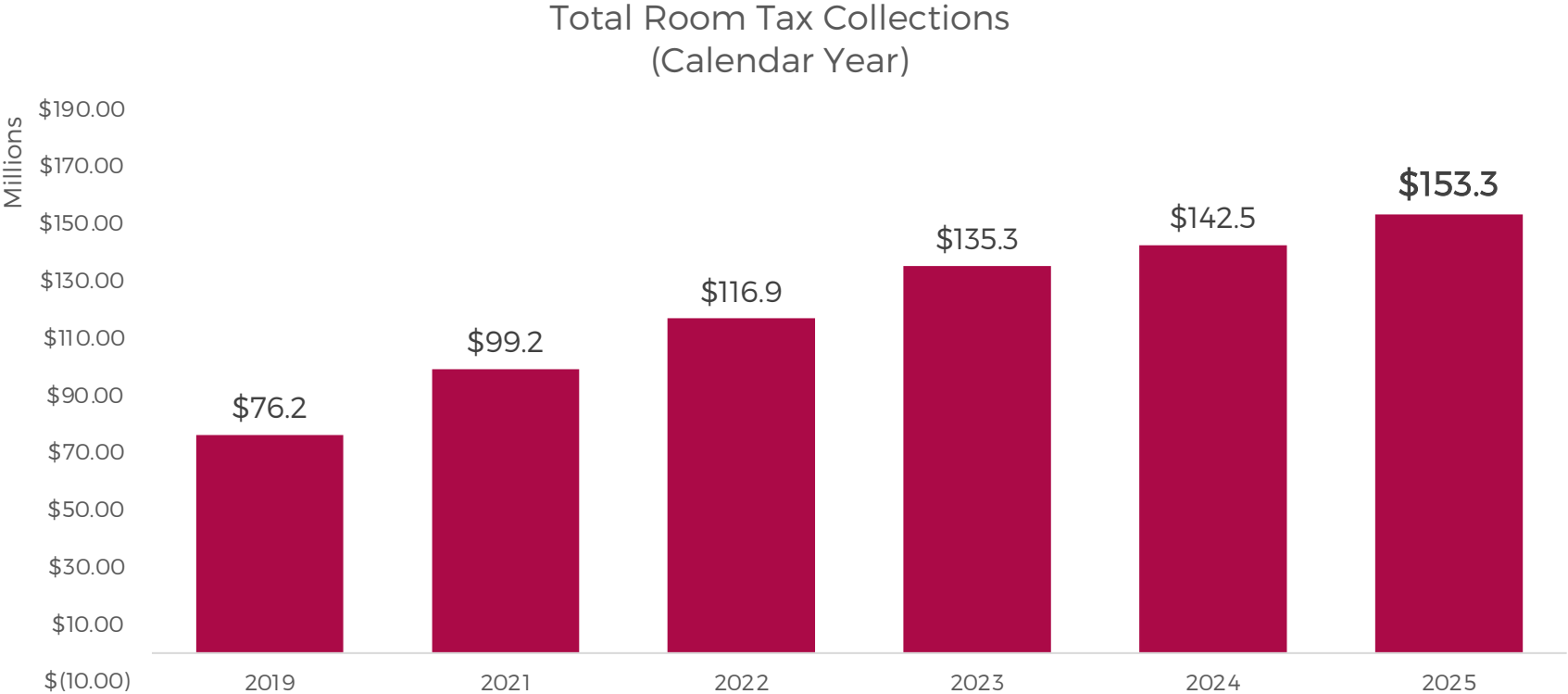


+25%

VS. JAN 2025

2025 BROUGHT RECORD ROOM TAX COLLECTIONS

THE INDUSTRY GROWTH CONTINUES TO DIRECTLY BENEFIT THE ECONOMY



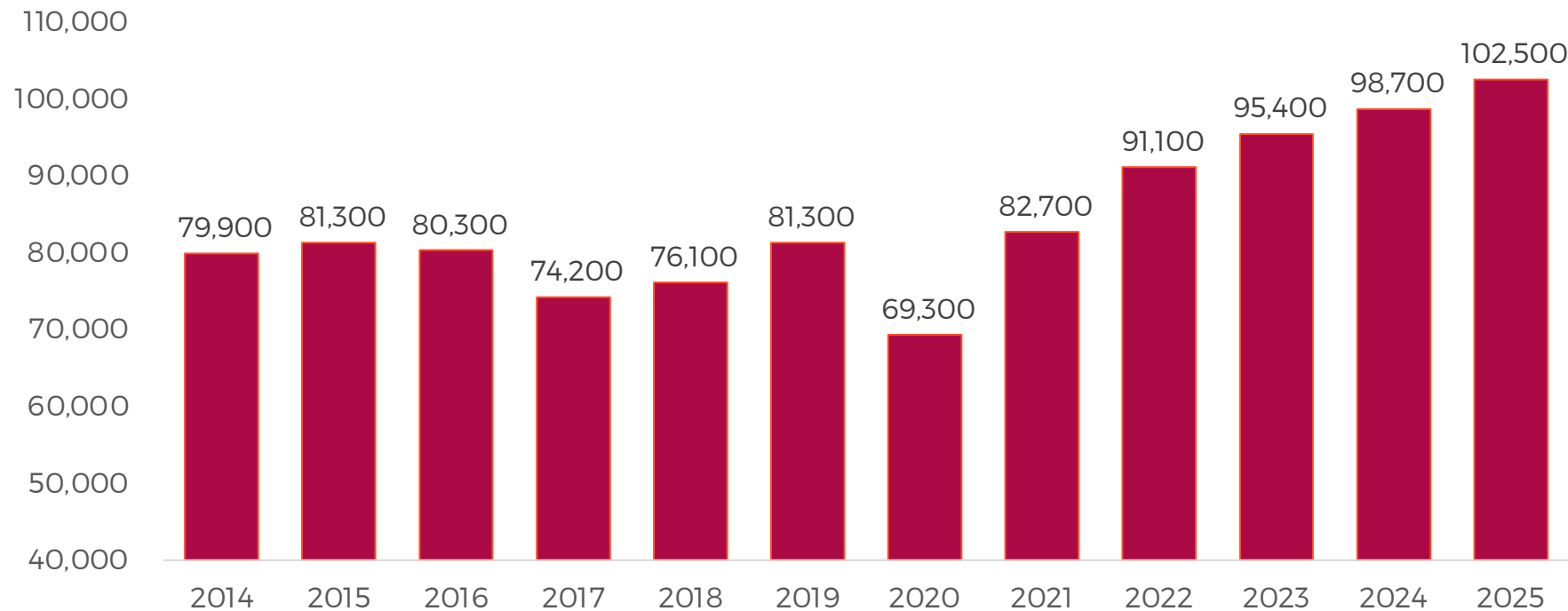
+8%

VS. 2024

LEISURE & HOSPITALITY JOBS

ON THE RISE

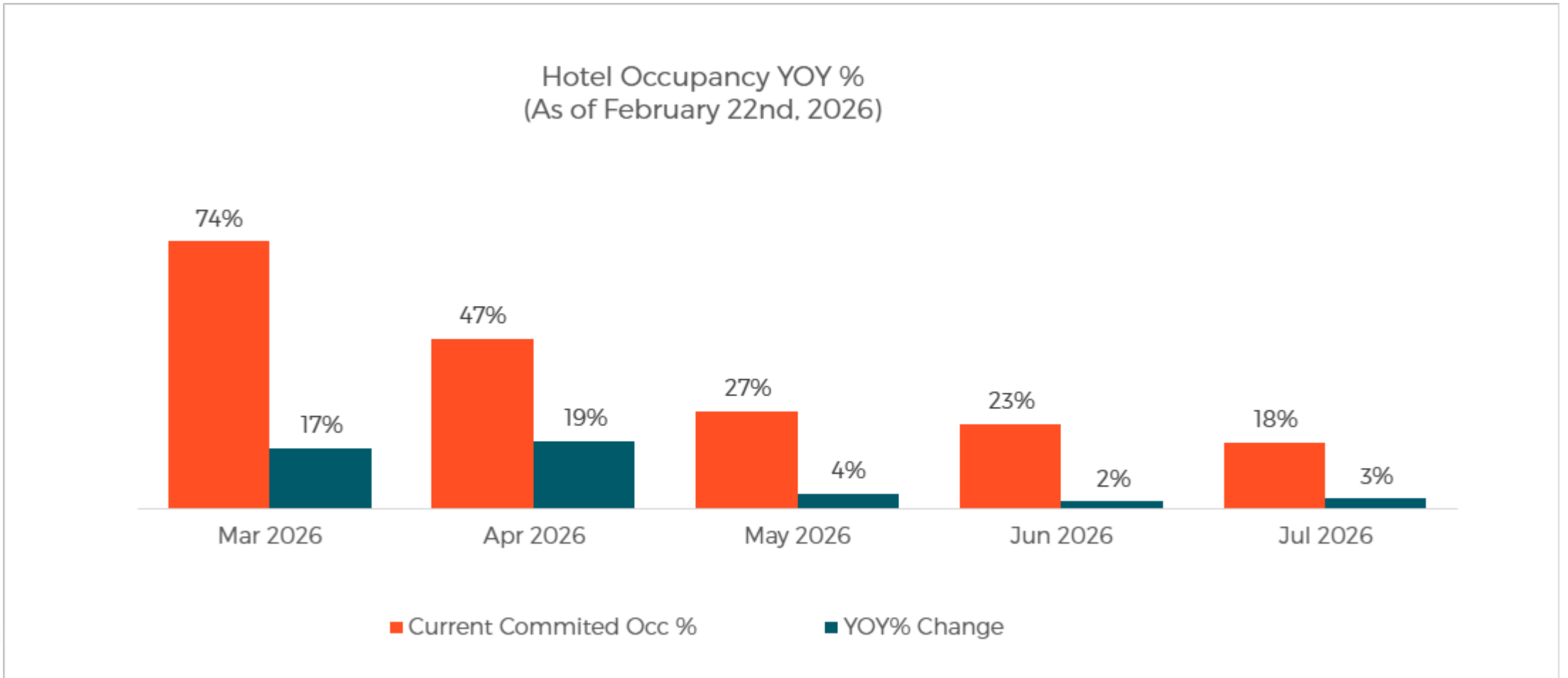
Puerto Rico
Leisure & Hospitality Monthly Jobs
(December 2014-2025)



+4%
VS. DEC 2024

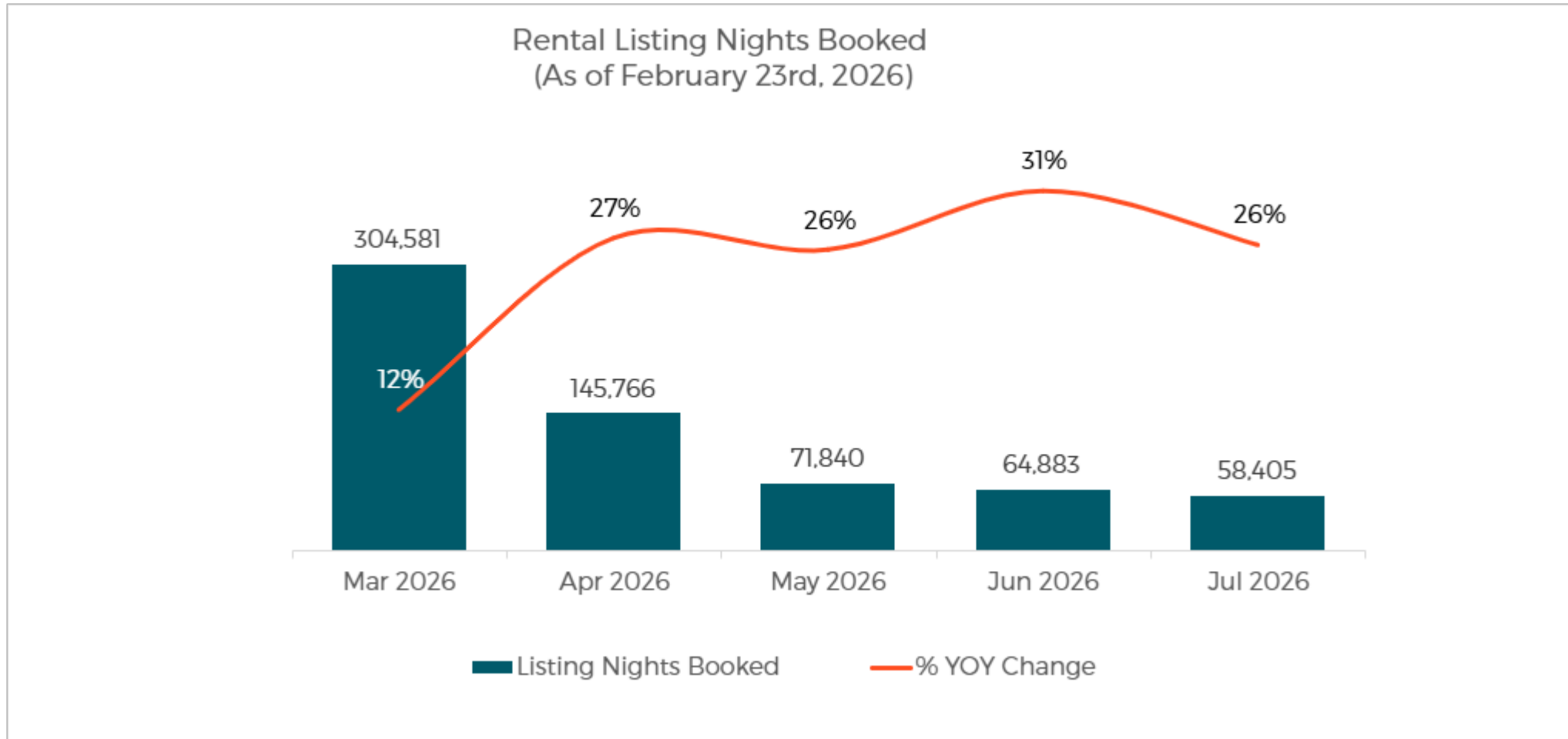
HOTEL BOOKING PACE

AS OF FEBRUARY 22, 2026



RENTAL BOOKING PACE

OVERALL LISTING NIGHTS BOOKED ARE PACING WELL AHEAD OF 2025



2026 U.S. TOURISM OUTLOOK

UNCERTAINTY REMAINS ELEVATED, BUT TRAVEL DEMAND OVERALL IS STILL HOLDING

- Upscale & premium segments outperform; value-conscious travelers continue to soften.
- Business & group travel rebounding, strengthening urban and convention-oriented markets.
- World Cup 2026 to lift U.S. demand, including spillover into non-host destinations.
- International inbound down, but Mexico, Central America & parts of Europe showing resilience.
- Lean into higher-income and premium travelers with luxury, culinary, and cultural positioning.
- Offer smart value strategies for soft midscale segments (bundles, shoulder-season offers).
- Capitalize on group/business travel momentum
- Leverage World Cup adjacency— consider positioning Puerto Rico as a pre/post tournament getaway.
- Target recovering regional international markets (Mexico, Central America, Caribbean basin, Canada).



Sales & Destination Experience

ED CAREY

CHIEF SALES OFFICER

PRODUCTION FISCAL YTD PACE COMPARISON

FISCAL YEAR 2025-2026, JULY - FEBRUARY 21, 2025

1,003

Event Leads

▲ 14.8% YOY

635,240

Room Night Leads

▲ 3.9% YOY

218

Events Booked

▼ -7.2% YOY

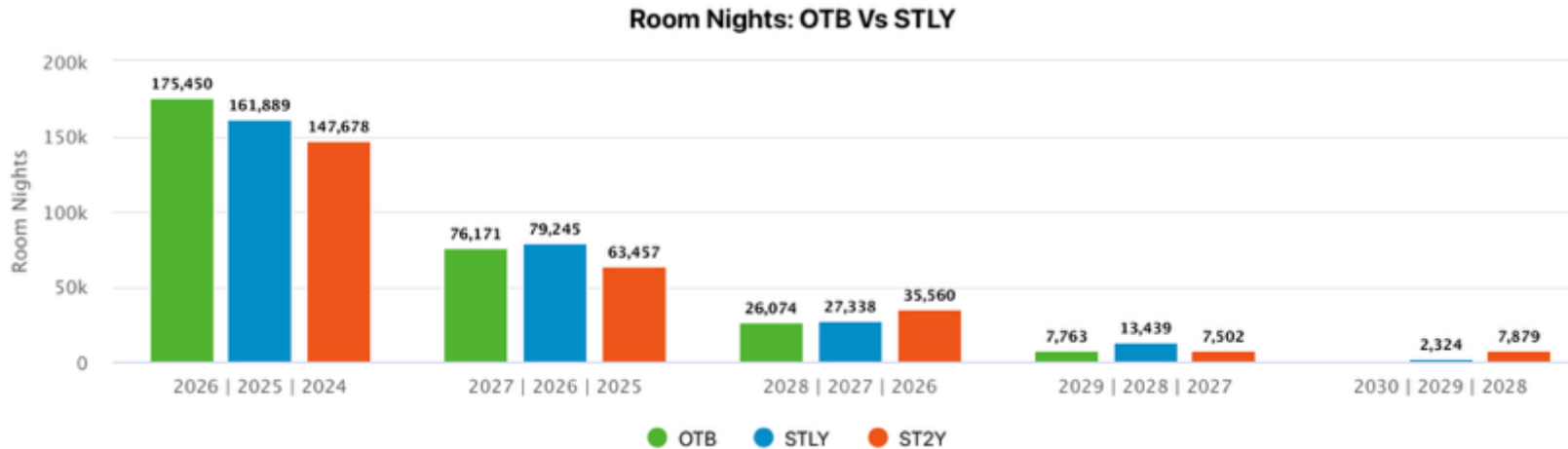
133,767

Rooms Booked

▲ 7.5% YOY

LONG TERM PACE COMPARISON

CALENDAR YEARS 2026-2030



Year	OTB			Cancelled			Tentative			Conversion Rate		
	RN	vs STLY	vs ST2Y	RN	vs STLY	vs ST2Y	RN	vs STLY	vs ST2Y	RN	vs STLY	vs ST2Y
2026	175,450	161,889 (↑8%)	147,678 (↑19%)	4,141	0 (-)	2,759 (↑50%)	156,357	230,741 (↓-32%)	129,407 (↑21%)	23.2%	22.3% (↑4%)	21.8% (↑6%)
2027	76,171	79,245 (↓-4%)	63,457 (↑20%)	894	0 (-)	0 (-)	215,959	231,431 (↓-7%)	235,092 (↓-8%)	18.3%	22.2% (↓-18%)	17.5% (↑5%)
2028	26,074	27,338 (↓-5%)	35,560 (↓-27%)	5,370	0 (-)	0 (-)	117,972	88,413 (↑33%)	144,433 (↓-18%)	15.1%	14.8% (↑2%)	22.5% (↓-33%)
2029	7,763	13,439 (↓-42%)	7,502 (↑3%)	0	0 (-)	0 (-)	50,587	40,302 (↑26%)	45,982 (↑10%)	13.8%	16.7% (↓-17%)	8.9% (↑54%)
2030	0	2,324 (↓-100%)	7,879 (↓-100%)	0	0 (-)	0 (-)	25,023	24,036 (↑4%)	32,427 (↓-23%)	0.0%	13.4% (↓-100%)	27.4% (↓-100%)

LONG TERM COMPRESSION

CALENDAR YEARS 2026-2030

OTB Room Nights by Month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2026		31,148	31,615	23,577	12,021	10,925	14,673	4,255	1,677	8,444	12,343	5,127	155,805
2027	16,554	11,089	3,028	7,570	11,344	5,931	1,481	3,661	2,684	1,796	9,522	1,491	76,151
2028	4,239	2,425	218	6,666	465	5,043	1,138	5,880	0	0	0	0	26,074
2029	1,818	955	231	3,639	0	0	0	0	0	1,120	0	0	7,763
2030	0	0	0	0	0	0	0	0	0	0	0	0	0
2031	0	0	740	0	0	0	0	0	0	0	0	0	740
													266,533

Room Nights in the Pipeline (still in Lead or Tentative Status)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2026		16,491	15,101	21,296	21,674	13,346	9,167	3,958	10,057	7,362	13,426	16,413	156,313
2027	20,413	48,986	25,668	31,128	15,102	16,813	9,426	4,340	12,534	17,194	10,548	14,133	226,285
2028	11,167	22,233	20,467	12,677	9,415	4,019	7,316	617	823	2,950	4,348	10,925	106,957
2029	4,260	2,710	10,176	8,144	2,823	4,382	3,620	0	0	0	2,400	3,320	41,835
2030	7,881	7	5,641	0	0	600	9,932	0	0	0	0	0	24,061
2031	0	0	4,060	0	0	4,959	0	3,522	0	0	0	0	12,541
2032	0	0	0	0	0	0	0	0	0	0	0	0	0
													567,992

CAPITALIZING ON THE “BAD BUNNY EFFECT”

SPAIN MARKET MOMENTUM

Market Signal

- Spanish partners reporting increased inquiries and bookings for Puerto Rico
- Cultural visibility creating a short term conversion opportunity
- Demand across MICE, incentives and leisure.

Our Response

- Targeted Spain sales mission (Madrid, Barcelona, Bilbao)
- Engagement with priority agencies and corporate buyers
- Alignment with existing Spain media activity.

Expected Outcome

- Convert momentum into near term bookings and pipeline development.
- Strengthen relationships with top Spanish agencies
- Expand Puerto Ricans positioning for European meetings & incentives.





Sales & Destination Experience

VANESSA FIGUEROA

DESTINATION EXPERIENCE SENIOR DIRECTOR

SERVICE EXCELLENCE RECOGNITION PROGRAM

CELEBRATING THE PEOPLE WHO MAKE PUERTO RICO UNFORGETTABLE

- **Concept & Purpose**

- A destination-wide recognition program that honors hospitality professionals who go above and beyond, embodying the warmth, culture, and professionalism that define Puerto Rico's service spirit.
- Meeting planners and clients can nominate any hospitality professional, from front-line staff to leadership.
- As of today, we have received 17 nominations!

- **Quarterly Recognition**

- All nominees receive a **Service Excellence Pin** to wear proudly.
- Card from our CEO acknowledging their contribution.
- Personalized piece of art from local artist for the program.



Service Excellence Nomination Committee



CLARISA JIMÉNEZ

President/CEO
Puerto Rico Hotel
and Tourism
Association



LOISSE HERGER

President/CEO
Olive Collection



STANLEY TAPIA

School Director
International
School of
Hospitality and
Culinary Arts
Universidad Ana
G. Mendez



JORGE PEREZ

Deputy Executive
Director for
Puerto Rico
Tourism
Company



VANESSA FIGUEROA

Destination
Experience
Senior Director
Discover Puerto
Rico



BETH BUSHMAN

National Sales
Director
Discover Puerto
Rico

LEADING WITH SERVICE IN PUERTO RICO

- **Marketing Perspective** - Will serve as a strategic content engine that strengthens Discover Puerto Rico's brand positioning as a leader in world class hospitality and service excellence in the MICE facing channels.
 - Through a structured quarterly social rollout that featuring nominee spotlights, testimonial videos, and winner recognition moments that will generate recurring, authentic content that highlights Puerto Rico's real service excellence stories.
 - A destination-wide recognition program that honors hospitality professionals who go above and beyond, embodying the warmth, culture, and professionalism that define Puerto Rico's service spirit.
- **Local Comms Perspective**
 - Amplifying recognition through multi-channel visibility, including social media, press releases, LinkedIn, newsletters, and industry communications.
 - Positioning nominees as ambassadors of Puerto Rico's service excellence and recognition of the program from industry leaders, committee members, and meeting planners.
 - Generating media exposure and industry awareness through public relations and earned media.
 - Reinforcing destination credibility through promotion at key tradeshow and industry events.



DISCOVER
Puerto Rico

**Thank
You**

