

**ICAO/CARICOM AIR TRANSPORT MEETING:
PROMOTING CONNECTIVITY FOR SUSTAINABLE AIR TRANSPORT
DEVELOPMENT:
GUYANA, 21-23 NOVEMBER 2018**

AIR TRANSPORT AND TOURISM: SMART PRODUCT MIX

“Rejuvenate, Recreate, Reconnect: New Directions for Caribbean Aviation”

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CTO Aviation Task force*



Overview: CTO Mandate

- The Caribbean's tourism development agency, with 24 Dutch, English, Spanish and French country members as well as private sector allied members
- Vision: to position the Caribbean as the most desirable, year round, warm weather destination
- Purpose: Leading Sustainable Tourism
One Sea, One Voice, One Caribbean
- Work: Advocacy, HRD, Sustainable Tourism Development, Research, Scholarship Foundation & **Air Transportation**



Overview: CTO Mandate

*To encourage,
champion and
inform
facilitation of
Air
Transportation
into and
throughout the
Caribbean*

Composition of CTO-ATF

CTO; Regulators ; Airport Authorities
CHTA; CARICOM; OECS; IATA; CDB

Work Programme Areas

- Safety & Security;
- Legal & Regulatory
- Economics
- Ease of Travel/Customer Satisfaction



Overview: Caribbean Tourism

Growing amidst many Challenges:

- Economic dependence
- Stiffening competition
- Vulnerability to Natural Disasters
- Lack of sectoral linkages
- High leakages

What is the Role of Air Transport?



Stay-Over Visitor Arrivals By Air to CARICOM Countries (by thousands)

	2013	2014	2015	2016	2017	% Change 2017/16
Antigua & Barbuda	243.9	249.3	250.5	265.2	247.3	-6.7
The Bahamas	1,365.6	1,427.1	1,484.1	1,481.8	1,505.1	1.6
Barbados	508.5	519.6	591.9	631.5	661.2	4.7
Belize	294.2	321.2	341.2	385.6	427.1	10.8
Dominica	78.3	81.5	74.5	78.1	71.3	-8.6
Grenada	116.5	133.5	132.5	135.4	146.4	8.1
Guyana	200.1	205.8	206.8	235.3	247.3	5.1
Haiti	419.7	465.2	515.8	467.1	420.8	-9.9
Jamaica	2,008.4	2,080.2	2,123.0	2,181.7	2,352.9	7.8
Montserrat	7.2	8.8	8.9	8.7	8.2	-6.0
St. Kitts & Nevis	101.0	104.7	110.3	106.8	106.5	-0.3
Saint Lucia	318.6	338.2	344.9	374.9	386.1	11.0
St. Vincent & the Grenadines	71.7	70.7	75.4	78.8	76.0	-3.5
Suriname	249.1	251.6	227.7	257.0	278.0	8.2
Trinidad & Tobago	434.0	412.5	439.7	408.8	394.7	-3.5
TOTAL – CARICOM	6,416.8	6,669.9	6,927.2	7,096.7	7,328.9	3.7

Source: CTO member countries and CTO estimates



Cruise Passenger Arrivals to CARICOM Countries (by thousands)

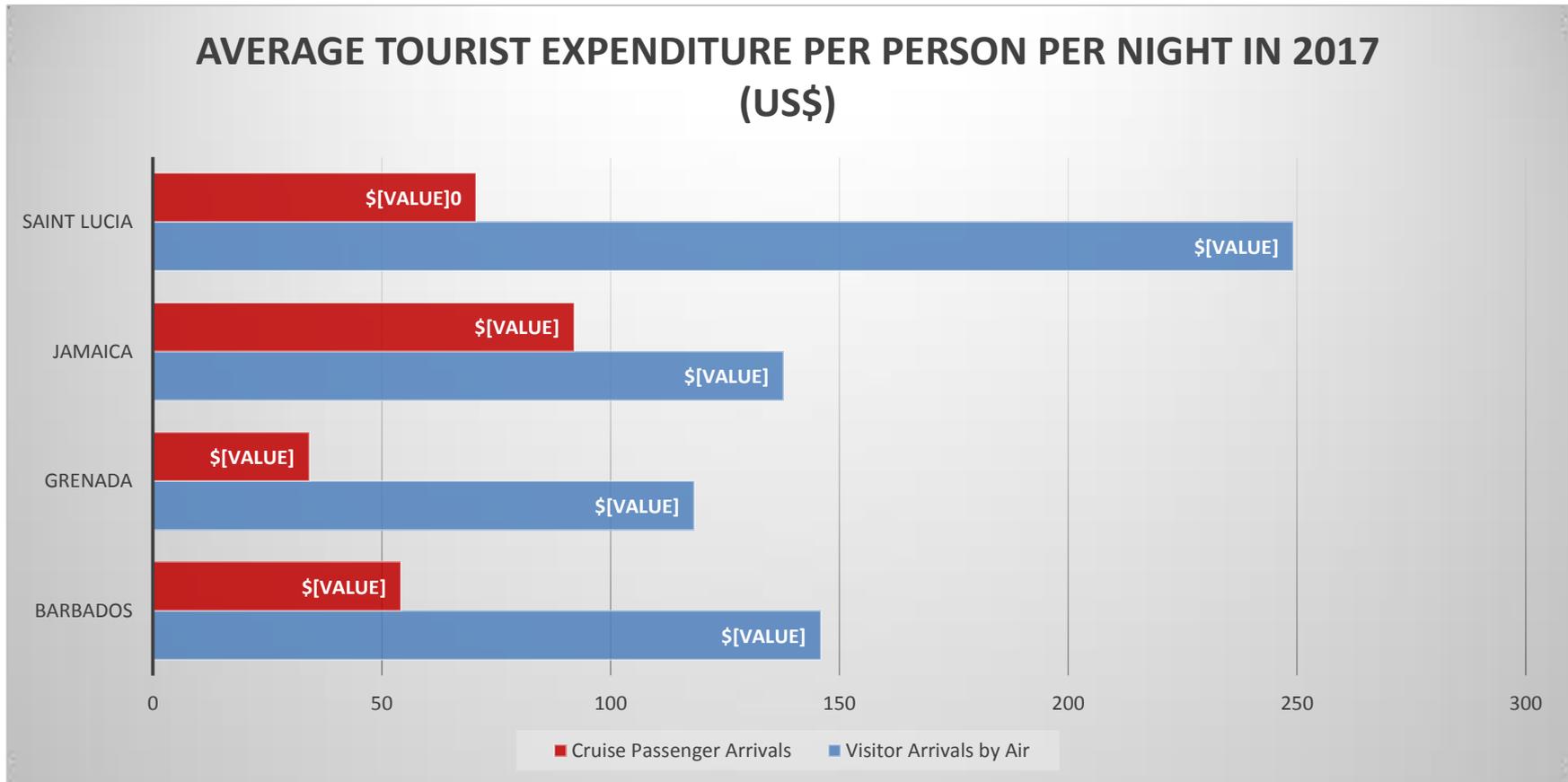
	2013	2014	2015	2016	2017
Antigua & Barbuda	533.9	522.3	644.3	608.5	792.9
The Bahamas	4,709.2	4,804.7	4,513.5	4,690.4	4,628.3
Barbados	570.3	557.9	586.6	595.0	681.2
Belize	677.4	968.1	958.0	1,005.4	1,014.2
Dominica	230.6	286.6	281.5	277.1	156.1
Grenada	197.3	235.1	280.5	314.9	299.4
Haiti	643.6	662.4	673.5	707.9	734.6
Jamaica	1,265.3	1,423.8	1,568.7	1,655.6	1,923.3
St. Kitts & Nevis	592.0	694.7	909.1	932.2	1,068.4
Saint Lucia	594.1	641.5	677.4	587.7	669.2
St. Vincent & the Grenadines	80.2	85.2	82.1	99.5	174.2
Trinidad & Tobago	33.1	42.8	79.4	83.0	68.4
TOTAL – CARICOM	10,127.0	10,925.1	11,254.6	11,557.2	12,210.2

Note: Total cruise visits as given above represent the sum of arrivals at individual destinations. However, because most cruise ships stop at more than one destination, this figure is considerably larger than the number of cruise passengers visiting the region.

Source: CTO member countries and CTO estimates



Estimated Average Visitor Spend: Air vis-a- vis Cruise

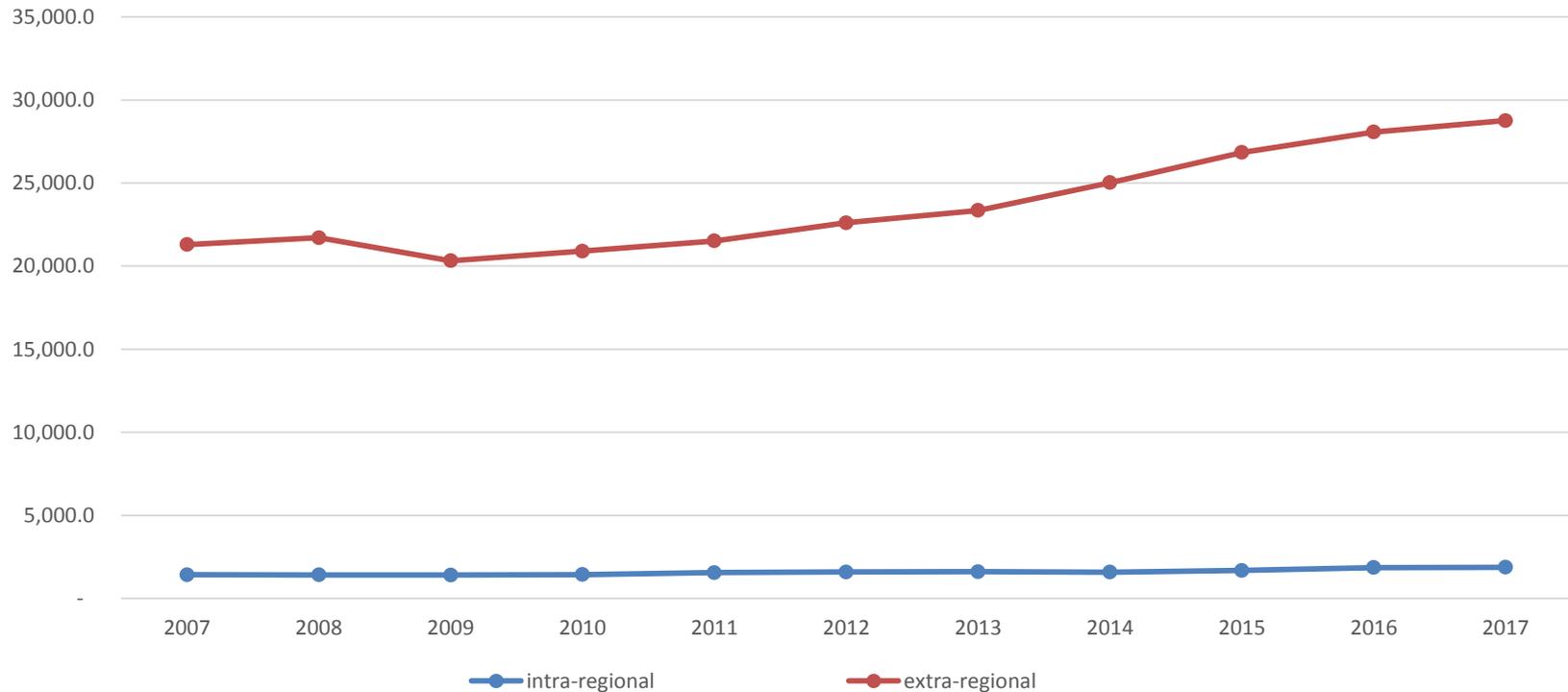


Source: Caribbean Tourism Organization



Comparison: Regional vis-à-vis International Air Arrivals

Intra-regional vs extra-regional tourist arrivals



Source: Caribbean Tourism Organization



Barriers to Intra-Regional Travel

Cost

Connectivity

Competitiveness

Security

**Language/
Metropolitan
Linkages**



Actions Required

Regional promotions and
Incentives

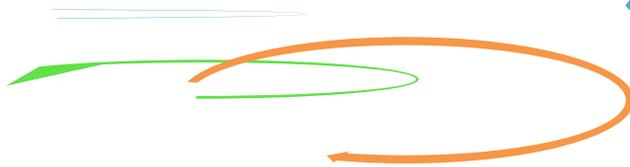
Inter-airline Cooperation

Taxation “Specials”

One-Stop Security



Legal Framework For International Travel



CTO/ATF Role Going Forward

Regulatory

Analysis

Advocacy and Facilitation

Public Awareness

