



# **Making Intra-Regional Travel Affordable, Accessible, and Profitable**

**Brian Challenger - CEO, LIAT**

**Ian Burns - CEO, AirOne**

**Roseanne Myers - Moderator**





## Accessibility within the region

- Anguilla
- Antigua and Barbuda
- Aruba
- Bahamas
- Barbados
- Belize
- Bermuda
- Bonaire
- British Virgin Islands
- Cayman Islands
- Cuba
- Curaçao
- Dominica
- Dominican Republic
- Grenada
- Guadeloupe
- Guyana
- Haiti
- Jamaica
- Martinique
- Montserrat
- Puerto Rico
- Saint Lucia
- St. Barts
- St. Eustatius
- St. Kitts and Nevis
- St. Lucia
- St. Maarten
- St. Martin
- St. Vincent & the Grenadines
- Suriname
- Trinidad and Tobago
- Turks and Caicos Islands
- United States Virgin Islands
- Venezuela





## Dependence on the Caribbean Market 2008

	Tourist Arrivals (000's)				Tourist Arrivals (000's)		
Destination	All Markets	Caribbean	% Share	Destination	All Markets	Caribbean	% Share
Dominica	79.5	40.5	50.9	Cuba	2348.3	245.7	10.5
Montserrat	7.4	2.7	36.1	St Maarten*	475.4	31.2	6.6
St Vincent & G'dines	84.1	28.5	33.9	Haiti	304.0	19.1	6.3
Grenada	130.4	30.4	23.3	Bonaire	74.3	4.6	6.2
Trinidad and Tobago	432.6	96.6	22.3	St Eustatius *	11.8	0.7	6.1
Anguilla	68.3	14.7	21.6	Cayman Islands	302.9	15.2	5.0
British Virgin Islands	345.9	74.3	21.5	Dominican Republic	3979.7	168.0	4.2
Guyana	132.8	28.3	21.3	US Virgin Islands	731.5	28.5	3.9
St Lucia	295.8	61.3	20.7	Jamaica	1767.3	67.8	3.8
Barbados	567.7	114.8	20.2	Aruba	826.7	29.3	3.5
Antigua and Barbuda	265.8	53.0	19.9	Saba*	12.0	0.4	3.3
Curacao	408.9	48.2	11.8	Puerto Rico	3674.9	90.6	2.5
Cuba	2348.3	245.7	10.5	Bahamas	1463.0	22.6	1.5
St Maarten*	475.4	31.2	6.6	Bermuda	263.6	4.0	1.5
Haiti	304.0	19.1	6.3	Belize	245.0	2.3	0.9
				Cancun (Mexico)	2165.3	7.6	0.4

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## How can we make intra-regional travel more affordable?

### PRICING STRUCTURE

GRENADA (GND)	FARE STRUCTURE		
	TOTAL FARE \$	AIRLINE \$	TAXES \$
FROM BGI	132.35	68.00	64.35
TO BGI	145.63	83.00	62.63
<b>TOTAL</b>	<b>277.98</b>	<b>151.00</b>	<b>126.98</b>

<b>% OF FARE</b>	54	46
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TAX STRUCTURE		
TO GND \$	TAX STRUCTURE	TO BGI \$
\$ 10.20	Sales Tax	\$ 12.45
\$ 27.50	Passenger Facility Charge	\$ 3.70
\$ 2.50	Airport Development Tax	\$ 6.00
\$ 7.40	Airport Authority Taxes	\$ 1.50
\$ 16.75	Fuel Surcharge	\$ 16.75
\$ -	Airport Passenger Taxes	\$ 22.23
<b>\$ 64.35</b>	<b>TOTAL</b>	<b>\$ 62.63</b>





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### PRICING STRUCTURE

ST LUCIA (SLU)	FARE STRUCTURE		
	TOTAL FARE \$	AIRLINE \$	TAXES \$
FROM BGI	126.87	\$ 65.00	\$ 61.87
TO BGI	105.57	\$ 50.00	\$ 55.57
<b>TOTAL</b>	<b>232.44</b>	<b>115.00</b>	<b>117.44</b>

<b>% OF FARE</b>	49	51
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TAX STRUCTURE		
TO SLU \$	TAX STRUCTURE	TO BGI \$
\$ 9.75	Sales Tax	\$ 7.50
\$ 27.50	Passenger Facility Charge	\$ 25.00
\$ 2.50	Airport Development Tax	\$ 4.82
\$ 5.00	Airport Authority Taxes	\$ 1.50
\$ 16.75	Fuel Surcharge	\$ 16.75
\$ 0.37	Airport Passenger Taxes	\$ -
<b>\$ 61.87</b>	<b>TOTAL</b>	<b>\$ 55.57</b>





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### PRICING STRUCTURE

JAMAICA (KIN)	FARE STRUCTURE		
	TOTAL FARE \$	AIRLINE \$	TAXES \$
FROM BGI		261.00	154.84
TO BGI		205.00	
<b>TOTAL</b>	<b>620.84</b>	<b>466.00</b>	<b>154.84</b>

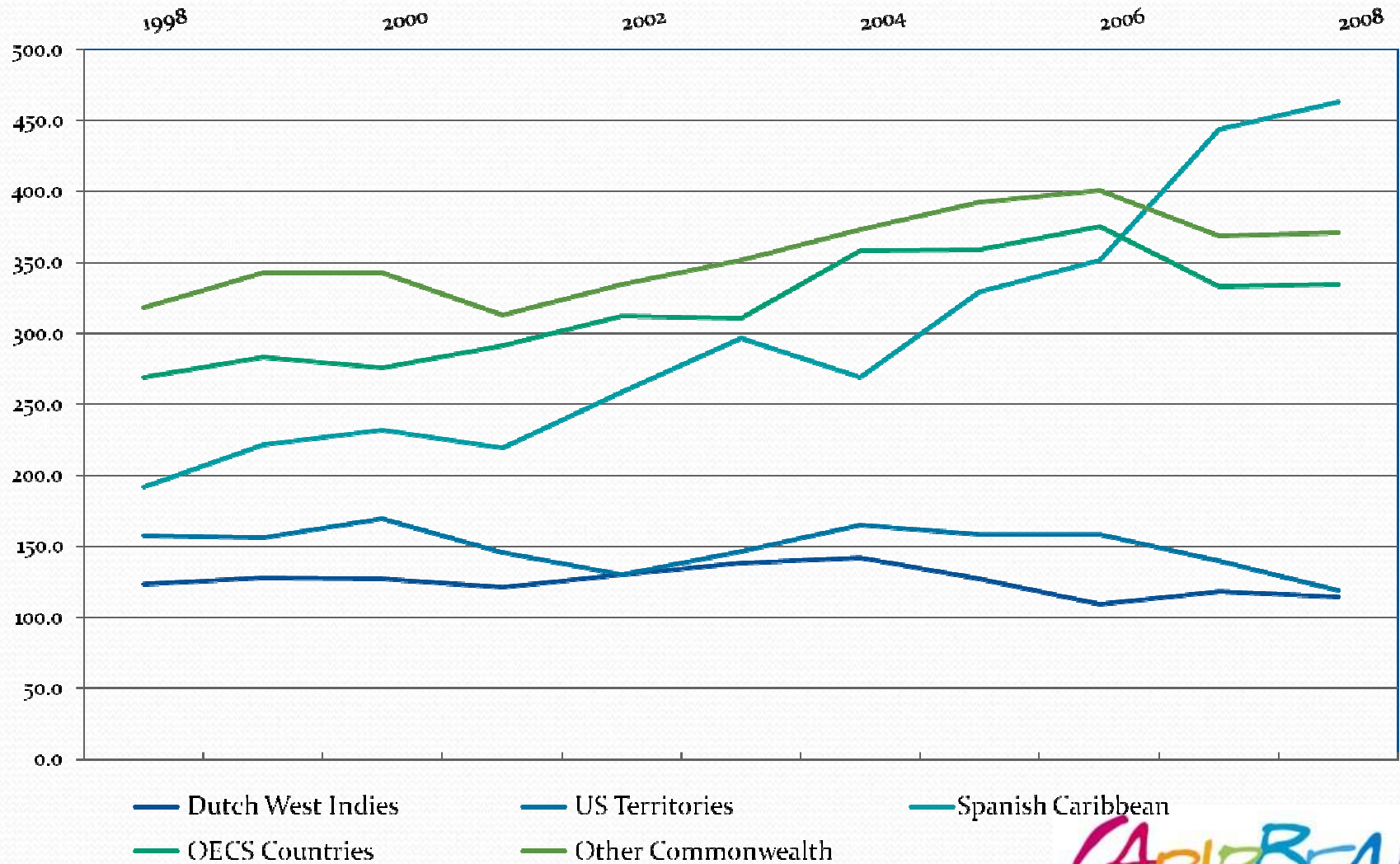
<b>% OF FARE</b>	75	25
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TAX STRUCTURE	
TAX STRUCTURE	US \$
Barbados: Travel Tax	69.90
Barbados: Airport Facilitation Fee	1.50
JG	27.50
JH	2.50
Jamaica: Passenger Service & Security Fee	9.34
Jamaica: Airport Improvement Fee	10.00
Jamaica: Tourism Enhancement Fee	10.00
JT	3.00
Jamaica: Travel Tax	21.10
<b>TOTAL TAXES BOTH WAYS</b>	<b>\$ 154.84</b>





## Tourist Arrivals From Caribbean ('000)





## Intra-regional Arrivals 2009 versus 2006

DESTINATIONS	2006	2009	% CHG. 2006-2009
<b>OECS COUNTRIES</b>	375.1	236.6	-37%
ANGUILLA	15.3	12.9	-16%
ANTIGUA & BARBUDA	54.0	41.5	-23%
BRITISH VIRGIN ISLANDS	N/A		
DOMINICA	46.6	40.5	-13%
GRENADA	30.9	27.0	-13%
MONTSERATT	2.9	2.3	-21%
ST KITTS & NEVIS	32.6	25.4	-22%
ST LUCIA	78.5	60.2	-23%
ST VINCENT & THE GRENADINES	38.2	26.8	-30%
<b>Other Commonwealth</b>			
BAHAMAS	19.3	18.9	-2%
BARBADOS	130.8	88.8	-32%
BELIZE *	2.3	2.4	3%
BERMUDA <sup>a e</sup>	N/A		
CAYMAN ISLANDS	11.4	15.2	
GUYANA	28.4	27.9	-2%
JAMAICA	56.6	65.9	16%
TRINIDAD & TOBAGO	126.1	82.4	-35%
TURKS & CAICOS ISLANDS	21.9	21.9	

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## Passenger Traffic – Regional Carriers

AIRLINE	JAN - DEC	JAN - DEC	% CHG
	2005	2009	2005 - 2009
BWIA/CA	561,807	206773	-63%
GRENADINES AIR	N/A	12625	N/A
CARIBBEAN STAR	231,204	N/A	N/A
LIAT	301,541	410283	36%
MUSTIQUE AIRWAYS	5,115	1848	-64%
ST. VINCENT AIR	11,062	3068	-72%
TRANS ISLAND AIR	26,228	N/A	N/A
TOTALS	1,136,957	634597	-502,360

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