


**CARIBBEAN TOURISM ORGANIZATION
STATE OF THE INDUSTRY CONFERENCE,
MARTINIQUE**

OCTOBER 16-18, 2013


***“THE REALITIES OF INTRA-CARIBBEAN
TOURISM.
AND WHO GETS IT”***

Intra-Caribbean arrivals by sub-region

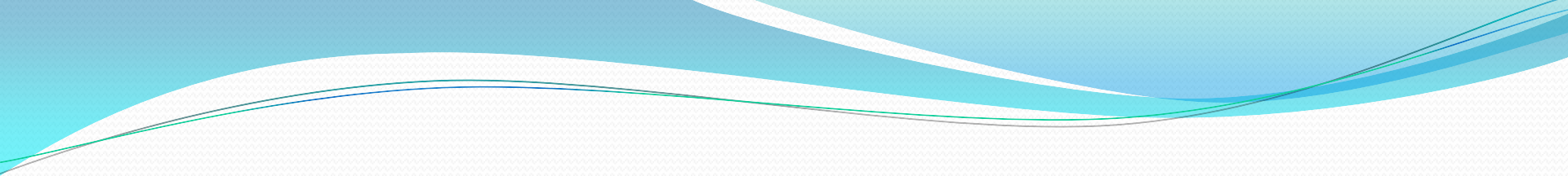
Region	2008	2009	2010	2011	2012
OECS	335.0	298.6	286.1	284.1	280.3
CARICOM	606.4	572.6	543.1	500.0	501.1
Other Cmwealth	366.9	332.3	316.9	293.2	279.6
Other Caribbean	750.4	835.8	899.7	941.4	1004.3




Historically intra-Caribbean travel reflects metropolitan and linguistic linkages and much inter-regional travel remains within these traditional political and economic groups i.e. English speaking, French speaking etc.



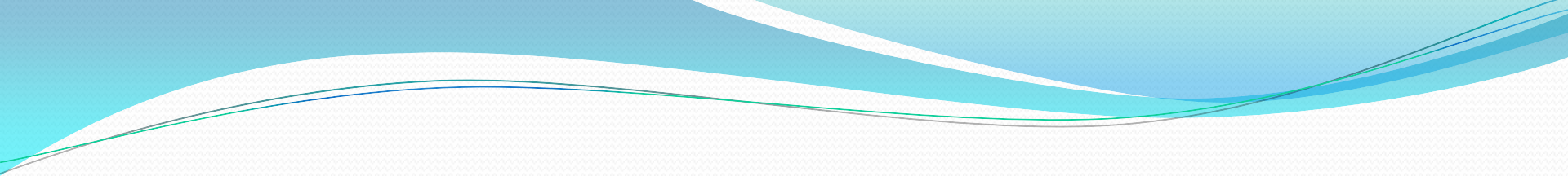
Driving forces behind intra-regional travel include business and commerce, “tourism”, visiting friends and relations, cultural and sporting activities, inter-governmental affairs, and specialist services (particularly medical and educational).



Other factors affecting intra-Caribbean travel include price of travel, macro-economic conditions, immigration requirements, and connectivity.



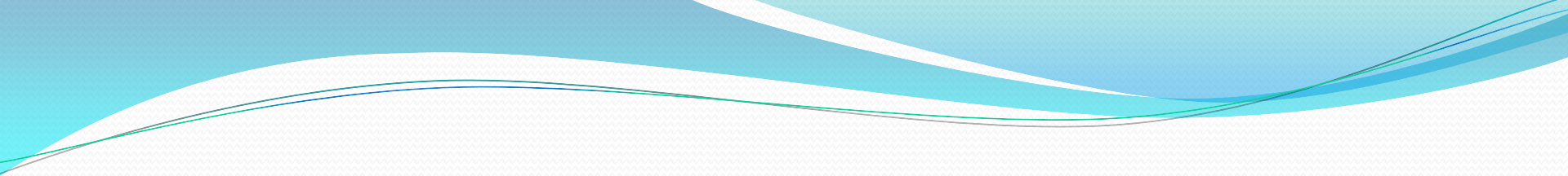
Formal aviation arrangements in the CTO region characterized by bilateral and multilateral agreements reflecting various traditional and liberalized approaches to exchange of route rights. These restrict fifth freedom rights and constrain operational flexibilities for airlines and travelers.



Additionally, increasing aviation security requirements further serve to increase difficulties for intra-regional travelers.



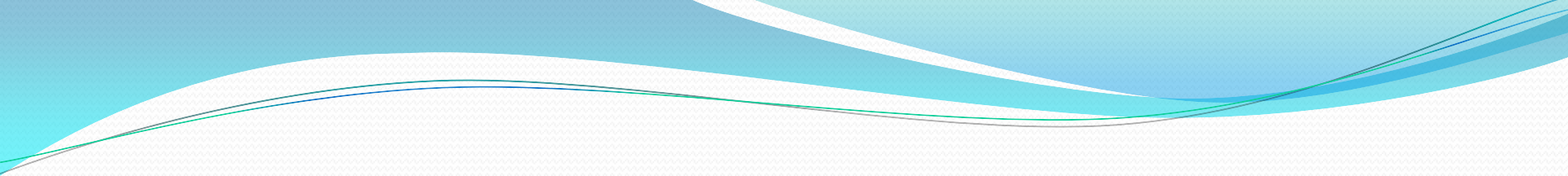
Various efforts underway, including through CTO Aviation Task Force, to address these legal and operational constraints.



Inter-island ferry services constitute important linkages between a few Caribbean destinations e.g. USVI – BVI, Martinique – Saint Lucia, Dominica – Guadeloupe.



Long-standing plans for
additional ferry services in the
eastern Caribbean.



Increasing importance of cruise tourism to Caribbean travelers as an alternative to traditional air and sea based travel.



Thank You!