WELCOME COFFEE

PROUDLY SPONSORED BY

AVIATION DAY CARIBBEAN

RUBiS Aviation

IATA

ALTA
MASTER OF CEREMONY

CANDICE KIMMEL

PRESIDENT
THE MAGIC OF AVIATION

PETER CERDÁ
REGIONAL VICE PRESIDENT, THE AMERICAS
AVIATION AS ECONOMIC ENABLER

• LAST YEAR, MORE THAN US$27 BILLION IN TOURISM SPENDING WAS MADE POSSIBLE BY AIR TRAVEL TO THE CARIBBEAN.

• AND AVIATION SUPPORTS MORE THAN US$35.9 BILLION IN GDP AND OVER 1.6 MILLION JOBS.

• EQUIVALENT TO 14% OF THE TOTAL CARIBBEAN ECONOMY.
BEAUTIFUL BEACHES, HISTORY & RICH CULTURE
AVIATION AS A LIFE LINE
QUESTIONs FOR THE DAY

❖ RIGHT BUSINESS ENVIRONMENT?
❖ OVER-TAXATION?
❖ AWARE OF GLOBAL COMPETITION?
❖ FOSTER INTRA-CARIBBEAN CONNECTIVITY?
❖ TOO MANY AIRLINES IN THE REGION?
❖ CONSOLIDATION?
INDUSTRY PROFITS UNDER PRESSURE IN 2018, BUT STILL HIGH

Global commercial airline profitability

% revenues

US$ billion

Source: ICAO, IATA
PER PAX PROFIT SHOWS WIDE REGIONAL VARIATION

Profit per passenger (US$)


Source: IATA
RECORD NUMBER OF CITY PAIRS = MORE CHOICE

Source: IATA Economics using data from ICAO, IATA Statistics, SRS Analyzer and our own forecasts
IMPEDIMENTS TO BETTER CONNECTIVITY

TAXES, CHARGES & FEES

REGULATORY BARRIERS

INEFFICIENT INFRASTRUCTURE
## TAXATION EXAMPLE: CARIBBEAN

<table>
<thead>
<tr>
<th>Intra-Regional</th>
<th>BASE FARE</th>
<th>TAXES</th>
<th>FEES AND CHARGES</th>
<th>FULL FARE</th>
<th>TFCS/FULL FARE (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BGI (BARBADOS) – SVD (ST. VINCENT)</td>
<td>298</td>
<td>52.16</td>
<td>121.7</td>
<td>471.86</td>
<td>37%</td>
</tr>
<tr>
<td>ANU (ANTIGUA) – SVD (ST. VINCENT)</td>
<td>210</td>
<td>21</td>
<td>213.9</td>
<td>444.9</td>
<td>53%</td>
</tr>
<tr>
<td>POS (TRINIDAD) – KIN (JAMAICA)</td>
<td>400</td>
<td>85</td>
<td>125.79</td>
<td>610.79</td>
<td>35%</td>
</tr>
<tr>
<td>NAS (BAHAMAS) – PLS (TCI)</td>
<td>213</td>
<td>98.13</td>
<td>60</td>
<td>371.13</td>
<td>43%</td>
</tr>
<tr>
<td>BGI (BARBADOS) – GRE (GRENAADA)</td>
<td>198</td>
<td>34.66</td>
<td>136.04</td>
<td>368.7</td>
<td>46%</td>
</tr>
<tr>
<td><strong>SLU (CASTRIES, SAINT LUCIA) – BGI (BARBADOS)</strong></td>
<td><strong>150</strong></td>
<td><strong>11.26</strong></td>
<td><strong>182.08</strong></td>
<td><strong>343.34</strong></td>
<td><strong>56%</strong></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Extra-Regional</th>
<th>BASE FARE</th>
<th>TAXES</th>
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<th>FULL FARE</th>
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</thead>
<tbody>
<tr>
<td>BGI (BARBADOS) – MIA (MIAMI) USA</td>
<td>640</td>
<td>148.6</td>
<td>58.91</td>
<td>847.51</td>
<td>24%</td>
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<td>POS (TRINIDAD) – PTY (PANAMA CITY, PANAMA)</td>
<td>459</td>
<td>158.8</td>
<td>60</td>
<td>677.8</td>
<td>32%</td>
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<tr>
<td>NAS (BAHAMAS) – JFK (NEW YORK, USA)</td>
<td>328</td>
<td>69.7</td>
<td>85.81</td>
<td>483.51</td>
<td>32%</td>
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<tr>
<td>UVF (VIEUX FORT, SAINT LUCIA) – MIA (USA)</td>
<td>665</td>
<td>86.5</td>
<td>124.91</td>
<td>876.41</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: LIAT, CAL, Bahamasair, AA, Copa
TAXATION EXAMPLE: CARIBBEAN

- EACH $1 OF TICKET TAX COULD LEAD TO:
  - OVER 40,000 FEWER FOREIGN PASSENGERS
  - $20M OF REDUCED TOURIST EXPENDITURE
  - 1,200 FEWER JOBS
**CARTAGENA: 2015 EXAMPLE**

**AIRPORT FEE REDUCTION**
92 TO 38 dollars

**INTERNATIONAL PASSENGERS**
\[\uparrow \text{52\%}\]

**TOURIST ARRIVALS**
\[\uparrow \text{47\%} \text{ to Cartagena}\]

\*FASTEST GROWING INTERNATIONAL AIRPORT IN COLOMBIA

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**CTG International Pax**

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<th>Total Pax</th>
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Source: Aerocivil

**CTG International Tourists Flow**

<table>
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<tr>
<th>YEAR</th>
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Source: Migracion Colombia

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**4 NEW ROUTES**

- CTG-ATL (Delta starting Dec ‘15)
- CTG-FLL (JetBlue starting Oct ‘14)
- CTG-AMS (KLM starting Mar ’17)
- CTG-MAD (Air Europa starting Mar ’17)
CARIBBEAN COMPETES AGAINST GLOBAL DESTINATIONS
PREPARING FOR TOMORROW
20 YEAR PAX GROWTH OUTLOOK TO 2036

- **North America**: 544m, 2.5%
- **Latin America & The Caribbean**: 373m, 3.6%
- **Europe**: 492m, 1.9%
- **Middle East**: 276m, 4.3%
- **Africa**: 197m, 4.6%
- **Asia Pacific**: 2,126m, 4.4%
INCREMENTAL PAX TRAFFIC GROWTH (2036 VS. 2016)
THE FUTURE ROLE OF GOVERNMENT

GOVERNMENT SUPPORT

- Efficient Infrastructure
- Harmonized and Intelligent Consumer Laws
- Competitive Fees and Charges
- Harmonized and efficient Regulation

TRAFFIC GROWTH

NO SUPPORT
STATES THAT GET IT = POSITIVE OUTCOMES

Dubai

Singapore

Panama
3 PRIORITIES TO ADVANCE CARRIBEAN AVIATION AGENDA

1. Review cost structures & excessive taxation to global averages to be competitive.

2. Ensure government sees aviation as a business partner and economic engine of growth.

3. Update infrastructure & enhance security and facilitation practices.
THANK YOU
KEYNOTE SPEECH

DR. WARREN SMITH
PRESIDENT
WELCOME BY ALTA

LUIS FELIPE DE OLIVEIRA
EXECUTIVE DIRECTOR
Our objective is to contribute to the economic and social development of our nations through a safer, more efficient and sustainable aviation industry in the Latin American and Caribbean region.

To achieve it, ALTA is bringing more companies together to join efforts across the entire industry, from airlines to suppliers, governments and other industry associations.
Air Transport continues to outperform Economic Growth in the region

Source: ALTA, World Bank

Latin American and Caribbean Air Transport Association
Latin American and Caribbean carriers have doubled passenger traffic during the last 10 years.

281M Passengers carried in 2017

7% of World Total

Source: ALTA
More than 650 million passengers will travel by airplane in Latin America and the Caribbean in 2035.
Caribbean Region in Perspective
Caribbean GDP, PPP (constant 2011 international $)

Source: World Bank
Caribbean Region

- Travel & Tourism total contribution to GDP is around 15% (highest in all regions worldwide)
- Tourism accounts for 1 in every 8 jobs
- 4 times more dependent on tourism that any other region in the world
- Lowest growth rate in Latin America and Caribbean 2,5%
- 30.1M tourist arrivals in 2017, equivalent to 65%+ of total Caribbean population
- Tourist arrivals to the Caribbean represent 2.3% of Global International Tourist arrivals

Latin American and Caribbean Air Transport Association
Caribbean Capacity Breakdown

Source: ALTA Analysis based on OAG data

Latin American and Caribbean Air Transport Association
Caribbean Region Capacity

Fastest growing markets in the Caribbean (seats offered)

CAGR 2008-2017

Central America: 8%
Europe: 4%
South America: 4%
North America: 4%
Intra-caribbean: -2%

Source: ALTA Analysis based on OAG data
Caribbean NA - Capacity

CAGR 2008-2017

<table>
<thead>
<tr>
<th>Region</th>
<th>CAGR 2008-2017</th>
<th>Market Share</th>
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<tbody>
<tr>
<td>USA Carriers</td>
<td>3%</td>
<td>79.7%</td>
</tr>
<tr>
<td>Canada Carriers</td>
<td>20.2%</td>
<td>14%</td>
</tr>
<tr>
<td>Caribbean Carriers</td>
<td>-3.8%</td>
<td>6.3%</td>
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Source: ALTA Analysis based on OAG data

Latin American and Caribbean Air Transport Association
Challenges & Opportunities
Challenges

- Limited Inter-Region Connectivity
- High Government Taxes and ATC Costs
- Fragmented Market

- Gaps in Infrastructure
- Regulatory Fragmentation
- Lack of Consolidation
• **No true Caribbean Hub** (over 93% of the Region’s Inter-Traffic is non-stop)

• **Intra-Caribbean connections** are mostly dominated by outside carriers
Caribbean is located in the middle of a population of 736M people

9 Million Annual Passengers

Strong Growth: 8.0% CAGR

21 Competing Carriers

Source: ALTA Analysis
Joint ventures and agreements

ALTA/IATA ISSA program for Latin America and Caribbean

[Logos of ALTA, IATA, and ISSA]
REGULATORY PANEL:
RECOGNIZING AVIATION AS ECONOMIC DRIVER

CHRISTOPHER BARKS
FAA

PAULINE YEARWOOD
CARICOM

MAURICIO NICHOLLS
RUBIS

VINCENT VANDERPOOL-WALLACE
BEDFORDBAKER GROUP

NARI WILLIAMS-SINGH
JAMAICA CIVIL AVIATION AUTHORITY
NETWORKING COFFEE BREAK

PROUDLY SPONSORED BY

Princess Juliana International Airport
KEYNOTE PRESENTATION:
AIR TRANSPORT, COMPETITIVENESS & CONNECTIVITY

DAMIEN REEVES
ECONOMIST

JAMES WILTSHIRE
HEAD OF POLICY ANALYSIS
OUTLINE

❖ CONNECTIVITY IN THE CARIBBEAN
❖ CAUSES OF LOST CONNECTIVITY
❖ CONSUMER IMPACTS OF LOST CONNECTIVITY
❖ ECONOMIC IMPACTS OF LOST CONNECTIVITY
❖ CONCLUSIONS & POLICY RECOMMENDATIONS
AVIATION AS AN ECONOMIC ENGINE

- 5.2 million jobs in LATAM and Caribbean supported by air transport
- 385 cities served in LATAM and Caribbean
- $167 billion LATAM-Caribbean GDP generated by air transport
- 300 flights every hour in LATAM and Caribbean
- 2,600,000 flights per year
- 160 global cities connected with LATAM and Caribbean
HIGH LEVELS OF DEPENDENCY ON AIR TRANSPORT

Departures per Capita, 2017

Global average = 0.5

Source: IATA Economics based on PaxIS, World Bank
GROWTH RATES VARY WIDELY ACROSS THE REGION

Source: IATA Economics based on DDS
THE IMPORTANCE OF CONNECTIVITY

Direct Connectivity
- Reflects direct services available from a given airport;
- Measured by number of destinations and/or destination importance;
- Can also consider frequency.

Indirect Connectivity
- Reflects destinations that only be reached with one or more stops;
- Connections weighted in terms of their quality;
- Key factors: connecting time and relative diversion.

‘Hub’ Connectivity
- For hub airports reflects the number of flight pairs that can be connected taking into account minimum and maximum connecting times.
- As with indirect connectivity, connections can be weighted by quality in terms of diversion factor and connecting times.
CUBA & DOMINICAN REP. LEAD IN CONNECTIVITY

Global Air Connectivity at City Level, 2018

Source: IATA Economics based on SRS Analyzer
Passenger Growth by Region, 2007-17

Source: Intervistas based on data provided by IATA
GLOBAL CONNECTIVITY MOSTLY INCREASING

Change in Global Connectivity
2008 to 2018

Source: Intervistas based on data provided by IATA
Change in Regional Connectivity
2008 to 2018

Source: IATA Economics
CAUSES OF LOST CONNECTIVITY

High costs, taxes, and fees

Lack of regulatory harmonisation

Inefficient operations
SHORT ROUTES CHALLENGING COMMERCIAL

Yield vs Distance by Country

Source: IATA Economics based on PaxiS
SHORT ROUTES CHALLENGING COMMERCIALLY

Average Revenue Per Passenger Per Kilometre, 2016

Global Average = USD0.08

Source: IATA Economics based on PaxIS
HIGH COSTS ADD TO THE CHALLENGE

Average airport charges per passenger (one-way)

- Suriname: $69
- St. Lucia: $69
- St. Kitts and Nevis: $69
- Bahamas: $59
- Guadeloupe: $55
- Curacao: $52
- Grenada: $48
- Turks and Caicos Islands: $45
- Trinidad and Tobago: $40
- Antigua and Barbuda: $40
- Barbados: $39
- Belize: $36
- Jamaica: $35
- Martinique: $34
- Aruba: $32
- Dominican Republic: $31
- Cuba: $28
- Dominica: $21
- Montserrat: $20
- Guyana: $15
- Haiti: $14
- Anguilla: $11

Source: IATA Aviation Charges Intelligence Center
BURDEN OF TAXES HIGHEST WITHIN REGION

Taxes, fees and charges
(for return travel in June 2018)

Source: CDB based on LIAT, CAL, BahamasAir, AA, Copa
CARTAGENA SHOWED IMPACT OF CUTTING TFCs

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Source: Migracion Colombia
INFRASTRUCTURE UTILIZATION RELATIVELY LOW

Movements per hour, by airport

- Departures
- Arrivals

MBJ

NAS

POS

BGI

Infrasctructure utilization relatively low.
CAUSES OF LOST CONNECTIVITY

- High costs, taxes, and fees
- Lack of regulatory harmonisation
- Inefficient operations
CONSUMER BENEFITS OF INCREASED CONNECTIVITY

Kingston, Jamaica

Direct 3 hours

Connecting 5-8 hours

Bridgetown, Barbados
POLICY REFORM WILL INCREASE TRAFFIC

Incremental Passenger Traffic, 2025 (%)

Source: InterVistas analysis
SIGNIFICANT WIDER ECONOMIC BENEFITS

Total Incremental Employment

BMC Total: 106k; All total: 207k

<table>
<thead>
<tr>
<th>Country</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANG</td>
<td>230</td>
</tr>
<tr>
<td>ANT</td>
<td>1,435</td>
</tr>
<tr>
<td>BAH</td>
<td>16,370</td>
</tr>
<tr>
<td>BAR</td>
<td>3,780</td>
</tr>
<tr>
<td>BVI</td>
<td>6,060</td>
</tr>
<tr>
<td>BZE</td>
<td>1,200</td>
</tr>
<tr>
<td>CAY</td>
<td>2,875</td>
</tr>
<tr>
<td>DOM</td>
<td>1,455</td>
</tr>
<tr>
<td>GRE</td>
<td>735</td>
</tr>
<tr>
<td>GUY</td>
<td>1,795</td>
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<tr>
<td>HAI</td>
<td>36,320</td>
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<td>JAM</td>
<td>14,360</td>
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<td>MON</td>
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<tr>
<td>SKN</td>
<td>550</td>
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<tr>
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<td>4,990</td>
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<td>3,200</td>
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<td>CUB</td>
<td>1,770</td>
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<tr>
<td>CUR</td>
<td>1,445</td>
</tr>
<tr>
<td>DR</td>
<td>28,945</td>
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<tr>
<td>GUA</td>
<td>6,880</td>
</tr>
<tr>
<td>MAR</td>
<td>3,920</td>
</tr>
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Total Incremental GDP (USD mn)

BMC Total: $1.5 bn; All total: $3.3 bn

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<tr>
<td>ANG</td>
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<tr>
<td>ANT</td>
<td>$40</td>
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<td>BAH</td>
<td>$415</td>
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<td>GUA</td>
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<td>MAR</td>
<td>$150</td>
</tr>
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Source: InterVistas analysis
SIGNIFICANT WIDER ECONOMIC BENEFITS

Suggested Strategies: Reduce Costs, Harmonise Regulations, Enhance Efficiency

INCREASED AIR TRAVEL DEMAND
E.g., a 25% reduction in taxes may increase traffic in BMCs by 13% by 2036

CONNECTIVITY & TIME SAVINGS
E.g., the Bridgetown to Kingston travel time could reduce from 5 - 8 to 3 hours

ECONOMIC IMPACTS
E.g., Policy changes could provide additional 140K jobs in the sector by 2036
POLICY CONCLUSIONS & RECOMMENDATIONS

ACTIONS FOR CONSIDERATION BY GOVERNMENTS:

❖ STIMULATE DEMAND AND CONNECTIVITY BY REDUCING TAXES & CHARGES TO MAKE AIR TRAVEL MORE AFFORDABLE

❖ STRENGTHEN EFFORTS TOWARDS REGULATORY HARMONIZATION, INCLUDING ENHANCED MARKET ACCESS

❖ ENHANCE EFFICIENCY E.G. CUSTOMS & BORDER, INFRASTRUCTURE, AIR TRAFFIC MANAGEMENT

❖ INCREASE COLLABORATION BETWEEN COUNTRIES AND BETWEEN AIR TRANSPORT AND TOURISM SECTORS, INCLUDING THROUGH INTEGRATED DEVELOPMENT STRATEGIES

❖ TARGETED MEASURES TO SUPPORT DEVELOPMENT OF NEW ROUTES
THANK YOU!
LOOKING FOR INSIGHTS INTO AIR TRANSPORT MARKETS AND ISSUES?

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- Charts
- Presentations
- Videos and more.

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EXECUTIVE PANEL:
CHALLENGES FACING THE CARIBBEAN AVIATION GROWTH & INTRA-ISLAND CONNECTIVITY

JULIAN ROGERS
ROGERS MEDIA HOUSE

RAVI DARYANANI
PRINCESS JULIANA INTERNATIONAL AIRPORT

HUGH RILEY
CARIBBEAN TOURISM ORGANIZATION

JULIE REIFER-JONES
LIAT

TRACY COOPER
BAHAMASAIR
NETWORKING LUNCH

PROUDLY SPONSORED BY

Aviation Day
The Caribbean Airline

IATA
ALTA
Once, we were close, real close. Then we drifted apart.
PANEL DISCUSSION:
PREPARING CARIBBEAN AIRPORTS TO MEET TODAY’S DEMAND & TOMORROW’S GROWTH

BRIAN SAMUEL
CARIBBEAN DEVELOPMENT BANK

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AREA MANAGER, CARIBBEAN
PRIZE RAFFLE

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**AVIATION DAY CARIBBEAN**

**PRIZE RAFFLE**
2X BLUETOOTH CAR KITS
PRIZE RAFFLE

6X FITBITS

Rockwell Collins

Aviation Day - Caribbean
PRIZE RAFFLE

5 NIGHTS @ SIMPSON BAY RESORTS

&

3 NIGHTS OYSTER BEACH BAY RESORT
2X2 ROUND TRIP TICKETS
Caribbean Airlines
the warmth of the islands

2X2 ROUND TRIP TICKETS

PRIZE RAFFLE
2X ROUND TRIP TICKETS
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- LIAT The Caribbean Airlines
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- AIRPORTS AUTHORITY OF JAMAICA

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