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The Turks and Caicos Islands welcomed a total of 1,598,557 Visitor Arrivals for 2019. A 9 percent increase of arrivals overall to our shores when compared to the previous year’s record breaking figures. These arrivals compose of 486,739 Stopover and 1,111,818 Cruise. The Caribbean Tourism Organization describes the growth seen this year in the Caribbean tourism industry as the result of strong demand from the main sources coupled with increased airlift capacity, more diverse accommodation facilities and the sustained recovery following hurricane season 2017.

The destination recorded an impressive 10 percent increase in arrivals through our international airport and fixed based operations. The Grand Turk Cruise Center greeted a 9 percent increase in cruise passengers’ year-over-year. Similarly, for a consecutive year the Cruise Center also welcomed more ships, hosting 354 compared to 320 ship calls in 2018; this marked an 11 percent increase in ship calls year-over-year.

The Turks and Caicos Islands, has also seen increases in arrivals from its major source markets. The American market maintained its dominant share of total arrivals, accounting for 82% of the destination’s land based arrivals; The United States outbound travel market continued to grow steadily despite concerns about the US economy. Canada followed by Europe account for 9 and 4 percent of stopover arrival shares respectively.

The craving for new and authentic experiences remains the main driver for demand and spending on leisure travel worldwide, according to the CTO. The Turks and Caicos Islands must continue to put forth new and innovative marketing initiatives which will contribute significantly to sustained growth in the midst of the many threats in the global environment that we are seeing at this time.

This year-end report, prepared by the Statistical Officer of the Turks and Caicos Islands Tourist Board, presents the industry’s data along with commentary to broaden the industry’s understanding of our collective progress over the past year.
2019 Year End

Comparing 2018 and 2019

TOTAL VISITOR ARRIVALS
1,598,557

Cruise Passenger Arrivals
9% ↑

Land Based Arrivals
10% ↑

Number of Cruise Vessels
11% ↑

Land Based Arrivals from Major Markets
- United States: 9% ↑
- Canada: 20% ↑
- Europe: 20% ↑
Historical Arrival Totals

Total Visitor Arrivals 2011 - 2019

CHART 1, 2
Source: Air Stats: Immigration E/D Cards
Cruise Stats: Grand Turk Cruise Center

Land-Based and Cruise

Source: Turks and Caicos Islands Tourism 2019 Year End
Historical Arrival Totals; Air Arrivals by Month

CHART 3

Source: Air Stats: Immigration E/D Cards

Air Arrivals by Month

<table>
<thead>
<tr>
<th>Year</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>24353</td>
<td>24771</td>
<td>31877</td>
<td>28780</td>
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<td>28562</td>
<td>25203</td>
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<td>15712</td>
<td>21881</td>
<td>28738</td>
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<tr>
<td>2014</td>
<td>31155</td>
<td>32962</td>
<td>41389</td>
<td>34212</td>
<td>28779</td>
<td>30850</td>
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<td>30175</td>
<td>14376</td>
<td>18385</td>
<td>26904</td>
<td>34329</td>
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<td>39627</td>
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<tr>
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<td>44567</td>
<td>41981</td>
<td>50913</td>
<td>49933</td>
<td>33495</td>
<td>33333</td>
<td>43421</td>
<td>34992</td>
<td>19202</td>
<td>24582</td>
<td>29955</td>
<td>42586</td>
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<td>2017</td>
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<td>43597</td>
<td>48354</td>
<td>50206</td>
<td>33946</td>
<td>34606</td>
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<td>36244</td>
<td>2346</td>
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<td>23221</td>
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</tr>
<tr>
<td>2018</td>
<td>31737</td>
<td>41160</td>
<td>50128</td>
<td>43632</td>
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<td>42012</td>
<td>45206</td>
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<td>15768</td>
<td>21854</td>
<td>33736</td>
<td>43399</td>
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<tr>
<td>2019</td>
<td>42949</td>
<td>41704</td>
<td>56138</td>
<td>45045</td>
<td>42019</td>
<td>45781</td>
<td>47103</td>
<td>36220</td>
<td>13442</td>
<td>24182</td>
<td>40996</td>
<td>51160</td>
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</table>
Visitors by Month 2019

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Land Based Arrivals</strong></td>
<td>42949</td>
<td>41704</td>
<td>56138</td>
<td>45045</td>
<td>42019</td>
<td>45781</td>
<td>47103</td>
<td>36220</td>
<td>13442</td>
<td>24182</td>
<td>40996</td>
<td>51160</td>
</tr>
<tr>
<td><strong>Cruise Arrivals</strong></td>
<td>89527</td>
<td>96991</td>
<td>90762</td>
<td>85205</td>
<td>83155</td>
<td>86533</td>
<td>103118</td>
<td>92389</td>
<td>81292</td>
<td>81559</td>
<td>103460</td>
<td>117827</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>132476</td>
<td>138695</td>
<td>146900</td>
<td>130250</td>
<td>125174</td>
<td>132314</td>
<td>150221</td>
<td>128609</td>
<td>94734</td>
<td>105741</td>
<td>144456</td>
<td>168987</td>
</tr>
</tbody>
</table>

2019 has been another impressive year for the Turks and Caicos Islands, as Total Visitor Arrivals has seen an increase of 9%. Cruise arrivals account for the majority of the destination’s visitor population. The Turks and Caicos Islands Tourist Board continues to explore ways in which cruise arrivals can be converted to stayovers therefore creating a better balance.
## Land Based Arrivals by Country of Origin

<table>
<thead>
<tr>
<th>Month</th>
<th>United States</th>
<th>Canada</th>
<th>Europe</th>
<th>Caribbean</th>
<th>South America</th>
<th>Asia</th>
<th>Rest of the World</th>
<th>Not Stated</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>33924</td>
<td>5283</td>
<td>1792</td>
<td>384</td>
<td>1270</td>
<td>83</td>
<td>180</td>
<td>33</td>
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<tr>
<td>February</td>
<td>33017</td>
<td>5962</td>
<td>1370</td>
<td>363</td>
<td>703</td>
<td>107</td>
<td>157</td>
<td>25</td>
</tr>
<tr>
<td>March</td>
<td>46382</td>
<td>6846</td>
<td>1612</td>
<td>468</td>
<td>557</td>
<td>110</td>
<td>135</td>
<td>28</td>
</tr>
<tr>
<td>April</td>
<td>37155</td>
<td>3820</td>
<td>2375</td>
<td>504</td>
<td>787</td>
<td>103</td>
<td>254</td>
<td>47</td>
</tr>
<tr>
<td>May</td>
<td>36474</td>
<td>2421</td>
<td>1429</td>
<td>370</td>
<td>933</td>
<td>120</td>
<td>203</td>
<td>69</td>
</tr>
<tr>
<td>June</td>
<td>41120</td>
<td>1967</td>
<td>1100</td>
<td>496</td>
<td>773</td>
<td>126</td>
<td>154</td>
<td>45</td>
</tr>
<tr>
<td>July</td>
<td>40302</td>
<td>1863</td>
<td>2281</td>
<td>820</td>
<td>1333</td>
<td>175</td>
<td>317</td>
<td>12</td>
</tr>
<tr>
<td>August</td>
<td>28433</td>
<td>2175</td>
<td>3264</td>
<td>986</td>
<td>754</td>
<td>191</td>
<td>375</td>
<td>42</td>
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<tr>
<td>September</td>
<td>9672</td>
<td>1514</td>
<td>664</td>
<td>701</td>
<td>471</td>
<td>111</td>
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<td>October</td>
<td>18666</td>
<td>2547</td>
<td>1351</td>
<td>685</td>
<td>511</td>
<td>233</td>
<td>181</td>
<td>8</td>
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<tr>
<td>November</td>
<td>32219</td>
<td>4638</td>
<td>2226</td>
<td>669</td>
<td>589</td>
<td>293</td>
<td>255</td>
<td>107</td>
</tr>
<tr>
<td>December</td>
<td>40183</td>
<td>6089</td>
<td>2433</td>
<td>902</td>
<td>611</td>
<td>382</td>
<td>493</td>
<td>67</td>
</tr>
<tr>
<td>Totals</td>
<td>397547</td>
<td>45125</td>
<td>21897</td>
<td>7348</td>
<td>9292</td>
<td>2034</td>
<td>2952</td>
<td>544</td>
</tr>
</tbody>
</table>

### Air Visitor Country of Origin 2019

Air visitors from the United States grew by 9% year-over-year and accounted for 82% of the total. Canadian visitors increased in 2019 yet continues to account for 9% when compared to the previous year. Europe accounts for 4% of the total respectively.
The top markets for visitors to the Turks and Caicos Islands are the United States, Canada, United Kingdom, Italy, France, Germany, other European Countries, Brazil, the Caribbean and all other countries to follow.
United States Arrivals
Arrivals from the leading source market to the destination totaled 397,547 visitors. When compared to 2018, visitor arrivals from the USA showed a 9% increase.

Canada Arrivals
Arrivals from Canada saw an overall increase of 20%

Europe Arrivals
Arrivals from the European market for destination TCI saw a 20% increase. With the highest share coming out of the UK, France and Italy respectively.

Caribbean Arrivals
Arrivals from the Caribbean decreased by 29%

South America Arrivals
Arrivals from the South American Market predominately Brazil, Argentina indicated an increase of 29% in arrivals.
## Cruise Visitor Statistics

### NUMBER OF CRUISE SHIPS AND PAX FOR 2019

<table>
<thead>
<tr>
<th>Month</th>
<th>2019</th>
<th>Total Pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>31</td>
<td>89,527</td>
</tr>
<tr>
<td>February</td>
<td>34</td>
<td>96,991</td>
</tr>
<tr>
<td>March</td>
<td>27</td>
<td>90,762</td>
</tr>
<tr>
<td><strong>QTR 1 TOTAL</strong></td>
<td><strong>92</strong></td>
<td><strong>277,280</strong></td>
</tr>
<tr>
<td>April</td>
<td>26</td>
<td>85,205</td>
</tr>
<tr>
<td>May</td>
<td>25</td>
<td>83,155</td>
</tr>
<tr>
<td>June</td>
<td>24</td>
<td>86,533</td>
</tr>
<tr>
<td><strong>QTR 2 TOTAL</strong></td>
<td><strong>75</strong></td>
<td><strong>254,893</strong></td>
</tr>
<tr>
<td>July</td>
<td>28</td>
<td>103,118</td>
</tr>
<tr>
<td>August</td>
<td>25</td>
<td>92,389</td>
</tr>
<tr>
<td>September</td>
<td>25</td>
<td>81,292</td>
</tr>
<tr>
<td><strong>QTR 3 TOTAL</strong></td>
<td><strong>78</strong></td>
<td><strong>276,799</strong></td>
</tr>
<tr>
<td>October</td>
<td>26</td>
<td>81,559</td>
</tr>
<tr>
<td>November</td>
<td>39</td>
<td>103,460</td>
</tr>
<tr>
<td>December</td>
<td>44</td>
<td>117,827</td>
</tr>
<tr>
<td><strong>QTR 4 TOTAL</strong></td>
<td><strong>109</strong></td>
<td><strong>302,846</strong></td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>354</strong></td>
<td><strong>1,111,818</strong></td>
</tr>
</tbody>
</table>

*CHART 15  Source: Cruise Stats: Grand Turk Cruise Center*
Number of Cruise Ships For 2019 by Month

![Chart showing the number of cruise ships for 2019 by month](chart16.png)

Number of Cruise Ship Passengers For 2019 by Month

![Chart showing the number of cruise ship passengers for 2019 by month](chart17.png)

Source: Cruise Stats: Grand Turk Cruise Center
Total Number of Cruise Ships per Year

Source: Cruise Stats: Grand Turk Cruise Center
Cruise Arrivals 2006 - 2019

Source: Cruise Stats: Grand Turk Cruise
Cruise Visitors by Nationality

PASSENGERS BY NATIONALITY FOR 2019

- USA: 951,567 (36%)
- Canada: 53,710 (5%)
- United Kingdom: 53,710 (5%)
- Brazil: 37,440 (3%)
- Caribbean: 10,205 (1%)
- Guyana: 3,950 (1%)
- South America: 7,063 (1%)
- Rest of the World: 50,165 (4%)

Source: Cruise Stats: Grand Turk Cruise Center
Accommodation Statistics

Properties By Island - 2019

<table>
<thead>
<tr>
<th>Island</th>
<th>Hotels</th>
<th>Condo Hotels</th>
<th>Villas</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providenciales</td>
<td>12</td>
<td>26</td>
<td>129</td>
<td>9</td>
</tr>
<tr>
<td>Grand Turk</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>South Caicos</td>
<td>2</td>
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<td>North Caicos</td>
<td>2</td>
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<td>23</td>
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<td>Middle Caicos</td>
<td>0</td>
<td>0</td>
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<td>0</td>
</tr>
<tr>
<td>Parrot Cay</td>
<td>0</td>
<td>0</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>19</td>
<td>26</td>
<td>162</td>
<td>10</td>
</tr>
</tbody>
</table>

The Turks and Caicos Islands Tourist Board currently keeps record of all registered properties and their associated room counts, for units compromising of four bed or more across the islands.

The Board seeks to put into place a vacation rental registry that would be able to capture all available accommodations across the Turks and Caicos Islands.

CHART 21

Source: Turks and Caicos Islands Tourist Board

CHART 22

Source: Turks and Caicos Islands Tourist Board

Registered Properties Room Count 2019

<table>
<thead>
<tr>
<th>Island</th>
<th>Room Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parrot Cay</td>
<td>133</td>
</tr>
<tr>
<td>Middle Caicos</td>
<td>10</td>
</tr>
<tr>
<td>North Caicos</td>
<td>90</td>
</tr>
<tr>
<td>South Caicos</td>
<td>89</td>
</tr>
<tr>
<td>Grand Turk</td>
<td>79</td>
</tr>
<tr>
<td>Providenciales</td>
<td>3607</td>
</tr>
</tbody>
</table>
As of December 31st 2019, 1569 Active Rentals throughout the Turks and Caicos Islands has been listed on the Airbnb and HomeAway Rental Channels. These listings increased by 11% when compared with 2018 and are composed of entire homes, private rooms and shared room rental types.
Focus and Nurture of Sister Islands

The promotion of the Sister Islands is the top priority of the Tourist Board. Promotional and marketing materials such as maps, brochures, the website and social media pages are continuously updated in both print and digital formats to ensure up-to-date information of the Sister Islands is easily accessible. The traditional methods of marketing such as advertising in print media and attending various tradeshows in the US, Canada, Europe and Latin America are still being utilized to promote the Sister Islands as they have continually proven to be effective.

Furthermore, several strategies are being used to market and promote the Sister Islands, such as promoting culture and heritage tourism. The Turks and Caicos has a rich culture which includes delectable local delicacies, handmade crafts and many historical sites such as the Conch Bar Caves, the Cheshire Hall Plantation and the Grand Turk Lighthouse among others that are being advertised and used to attract tourists on a global scale.

The concept of dual vacations is also being heavily promoted. The Turks and Caicos offers our visitors a destination within a destination, each island has a unique identity and subculture. The islands are also easily accessible by short ferry rides and flights which makes it ideal for ‘island hopping’. A strong emphasis is now being place on splitting your trip and having day trips to islands such as North and Middle Caicos if you’re staying in Providenciales or splitting the nights across 2-3 different islands to get the true ‘Turks and Caicos Experience’.

- Jennifer Pardo
  Senior Marketing Executive
  Turks and Caicos Islands Tourist Board
The Turk & Caicos Tourist Board has continually promoted the Turks & Caicos as the number one tourism destination for both land based and cruise visitors in the Caribbean. The destination has won several accolades such as the World Travel Awards for Caribbean’s Leading Beach Destination and Caribbean’s Most Romantic and the Porthole Magazine’s Cruise Readers’ Choice Award for the Best Caribbean Beach Port. There recent awards are a testament to the destination’s continued success in the market.

The Turks and Caicos Islands recently also saw the commencement of several new developments and flight additions in 2019 from cities such as Chicago. This will continue to make way for increases in both visitor arrivals and the room inventory in the destination.

The Turks and Caicos has also renewed its commitment to promote sustainable tourism to ensure that the islands remain “Beautiful by Nature” for future generations. The Board has partnered with the Office of the Premier to promote the ban on plastic and polystyrene to both visitors and local stakeholders. This has taken the form of video and radio PSAs, local billboard advertising and dissemination of free reusable shopping bags. Moreover, the Board has remained committed to educating industry stakeholders on the importance of sustainability by launching its first Sustainable Tourism Symposium in November 2019 with similar sustainable tourism workshops to follow.

Lastly, the Tourist Board’s resolve to work hand in hand with our stakeholders to promote the destination has not wavered. There has been multiple partnerships for various press trips and tradeshows. This allows for the creation of a unified message and the reduction of cost while maximizing the output and exposure.

Jennifer Pardo
Senior Marketing Executive
Turks and Caicos Islands Tourist Board
Research Methodology

The Turks and Caicos Islands Tourist Board relies on data from many stakeholders to compile this report. Our primary source of data for this report is the Embarkation/Disembarkation card that all visitors to the Turks and Caicos Islands fill out upon arrival. This form is collected in cooperation with the Ministry of Border Control and Labour; Immigration Department. Air visitor data card counts are reconciled against daily counts by Immigration and TCI Airport Authority to ensure accuracy.

A list of additional data sources for this report are listed below:

1. Ministry of Border Control and Labour - Immigration Dept. - ED Cards and Border Management System data
2. Turks and Caicos Tourist Board - Quality Assurance Dept. - Accommodation inventory (properties and rooms)
   Marketing Dept. - Sister Islands Focus / Outlook 2020
3. Grand Turk Cruise Center - Cruise Statistics
4. Turks and Caicos Islands Airport Authority - Air Statistics (load factors)
5. Provo Air Center, Blue Heron Aviation, South Side Marina, Walkin Marina, Turtle Cove Marina, Blue Haven Marina and Caicos Marina - Private Flight / Vessel Arrivals.
6. Caribbean Cruisin - Ferry Tourist Count
7. Turks and Caicos Islands Government; Department of Statistics - Departing Visitors Survey.
8. Airbnb - Vacation Rental Statistics.
9. Caribbean Tourism Organization

The Turks and Caicos Islands Tourist Board extends many thanks to all partners and stakeholders that provide data for this and other reports.

Any queries/comments can be directed to:
Sharissa Lightbourne, Statistical Officer, SLightbourne@turksandcaicostourism.com.