

2019 TOURISM STATISTICS REPORT



TurksandCaicosTourism.com

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EXECUTIVE SUMMARY

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



Highlights

2019

Comparing 2018 and 2019

1,598,557

**TOTAL VISITOR
ARRIVALS**



9% ↑

**Cruise Passenger
Arrivals**



11% ↑

**Number of
Cruise Vessels**



10% ↑

Land Based Arrivals



**Land Based Arrivals
from Major Markets**

United States

9% ↑

Canada

20% ↑

Europe

20% ↑

Historical Arrival Totals

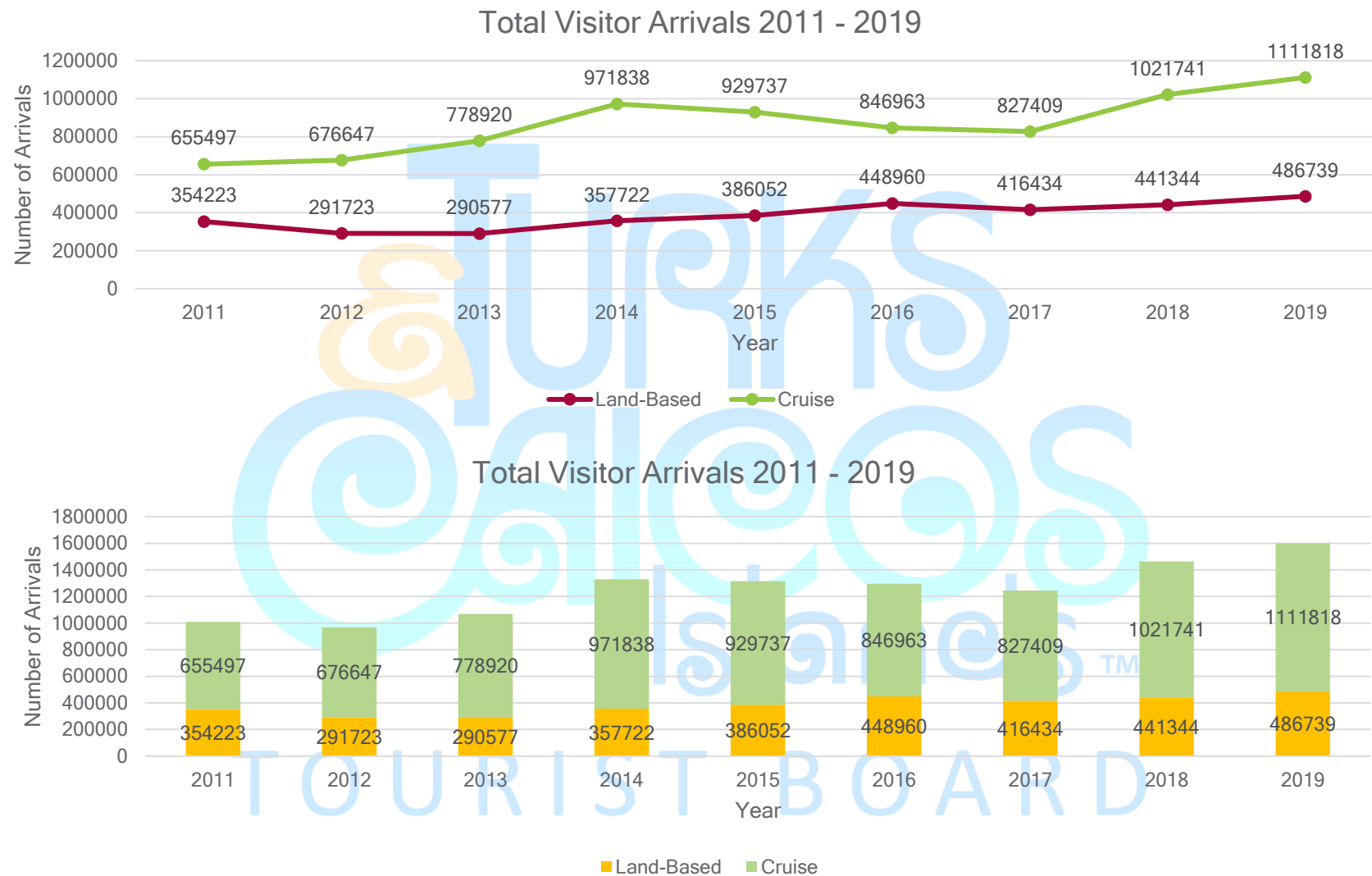


CHART 1, 2

Source: Air Stats: Immigration E/D Cards
Cruise Stats: Grand Turk Cruise Center

Historical Arrival Totals; Air Arrivals by Month

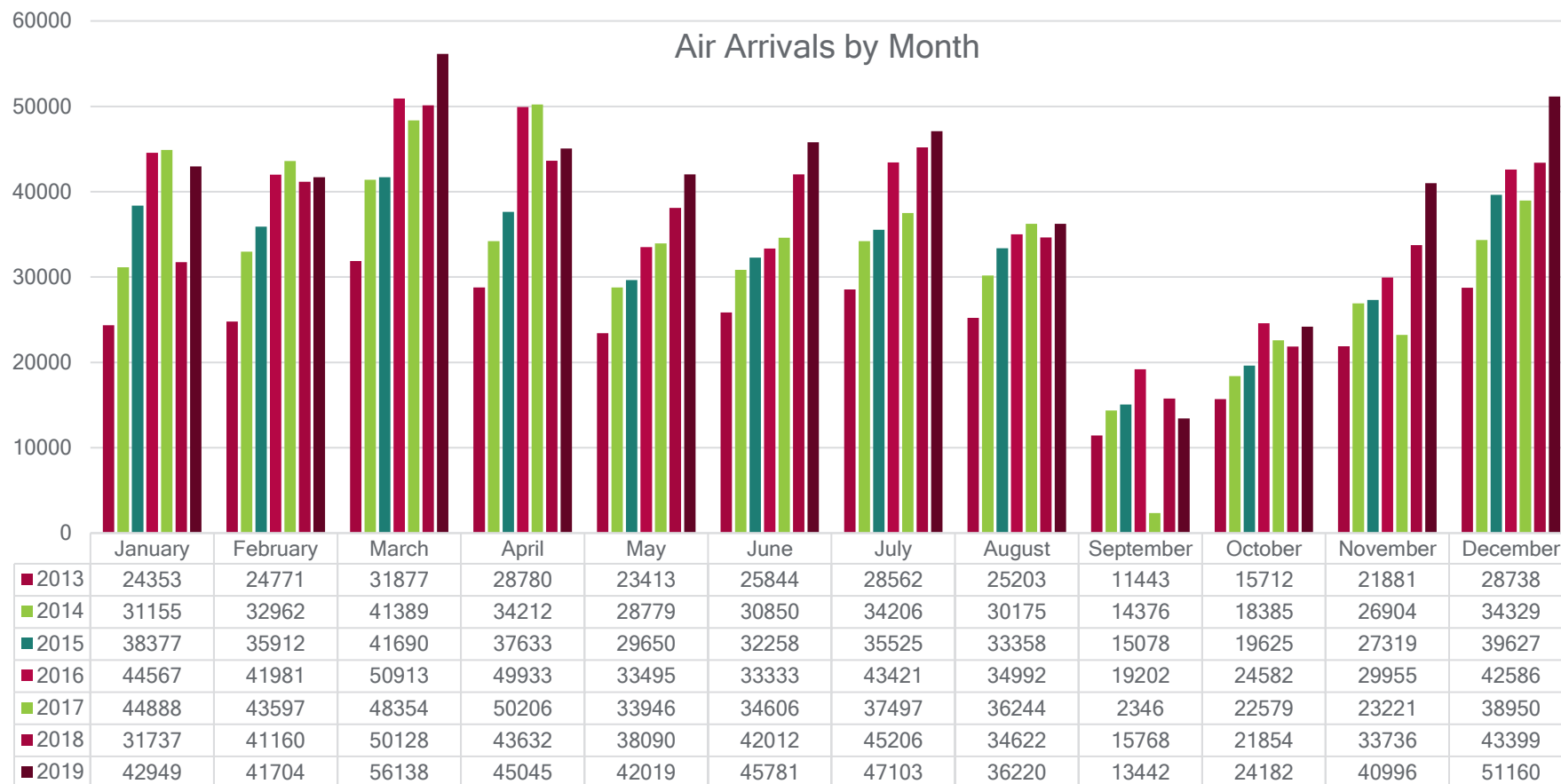


CHART 3

Source: Air Stats: Immigration E/D Cards

Visitors by Month 2019

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

CHART 4

Source: Air Stats: Immigration E/D Cards
Cruise Stats: Grand Turk Cruise Center

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.

Distribution of 2019 Visitor Arrivals

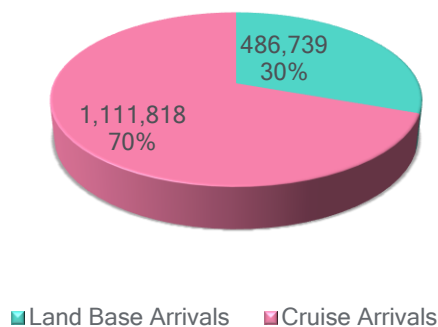


CHART 5

Source: Air Stats: Immigration E/D Cards
Cruise Stats: Grand Turk Cruise Center

OVERALL ARRIVALS BY MONTH

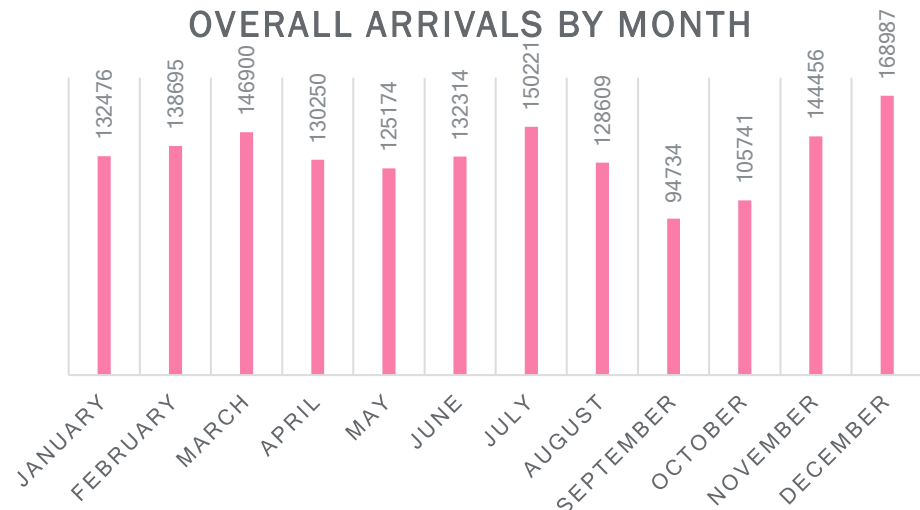


CHART 6

Source: Air Stats: Immigration E/D Cards
Cruise Stats: Grand Turk Cruise Center

Land Based Arrivals by Country of Origin

Month	United States	Canada	Europe	Caribbean	South America	Asia	Rest of the World	Not Stated
January	33924	5283	1792	384	1270	83	180	33
February	33017	5962	1370	363	703	107	157	25
March	46382	6846	1612	468	557	110	135	28
April	37155	3820	2375	504	787	103	254	47
May	36474	2421	1429	370	933	120	203	69
June	41120	1967	1100	496	773	126	154	45
July	40302	1863	2281	820	1333	175	317	12
August	28433	2175	3264	986	754	191	375	42
September	9672	1514	664	701	471	111	248	61
October	18666	2547	1351	685	511	233	181	8
November	32219	4638	2226	669	589	293	255	107
December	40183	6089	2433	902	611	382	493	67
Totals	397547	45125	21897	7348	9292	2034	2952	544



CHART 7 Source: Air Stats: Immigration E/D Cards

Air Visitor Country of Origin 2019

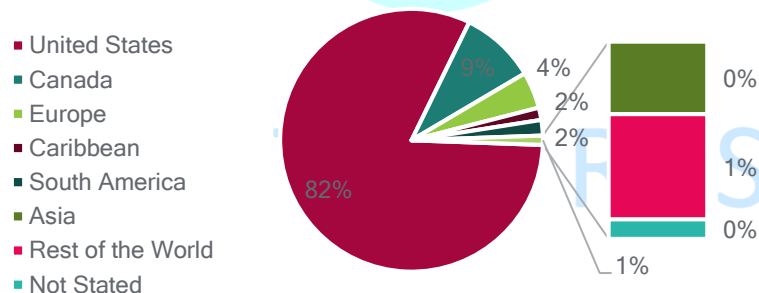


CHART 8 Source: Air Stats: Immigration E/D Cards

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.

Land Based Arrivals by Country of Origin 2019 vs 2018

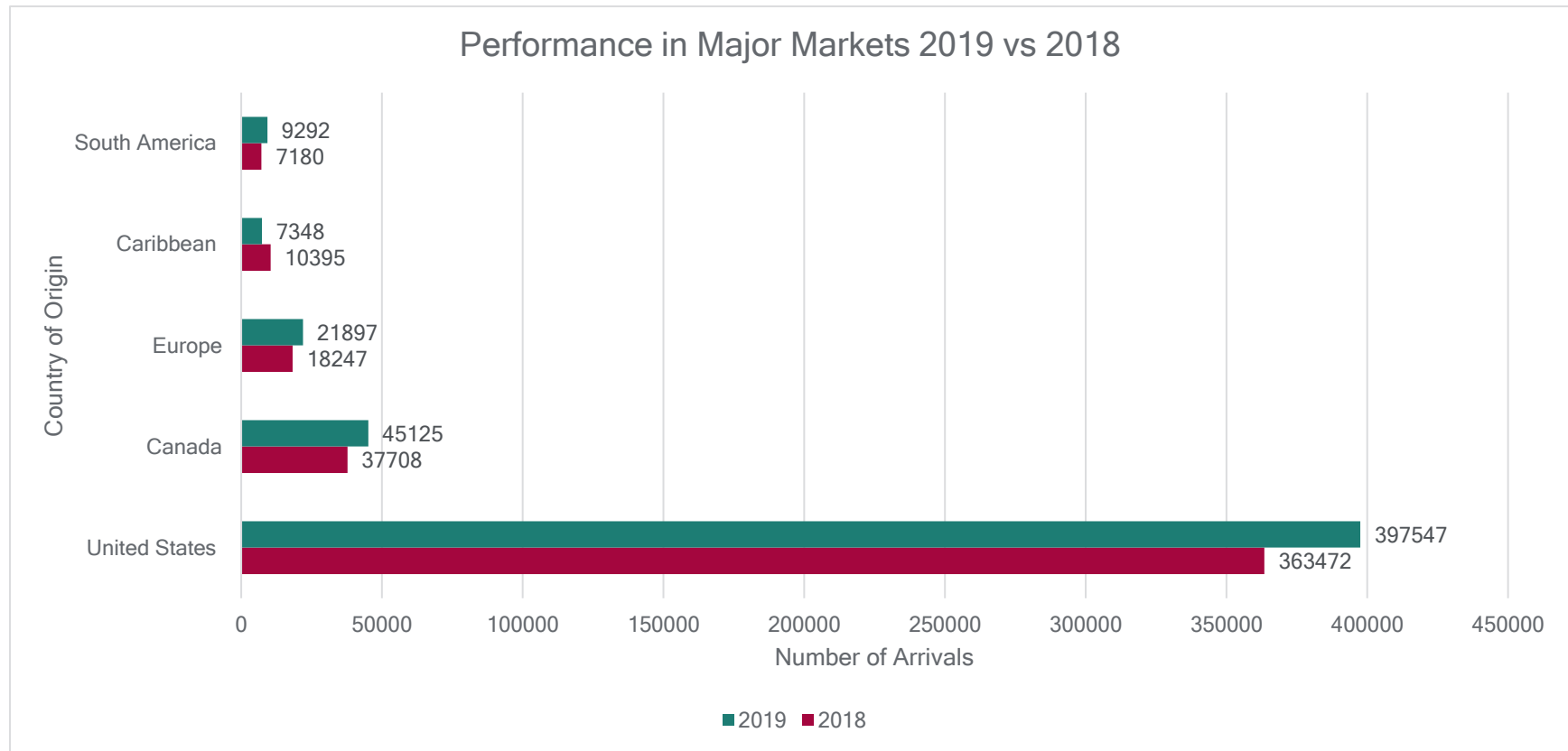


CHART 9

Source: Air Stats: Immigration E/D Cards

TOURIST BOARD

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.

Land Based Arrivals 2019 Major Markets

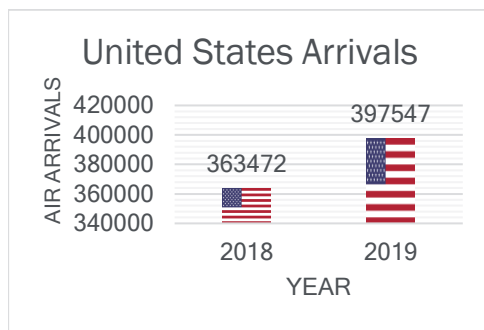


CHART 10 Source: Air Stats: Immigration E/D Cards

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.

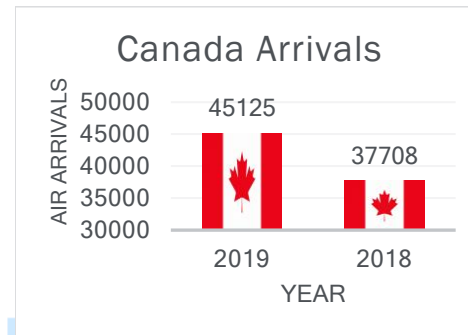


CHART 11 Source: Air Stats: Immigration E/D Cards

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

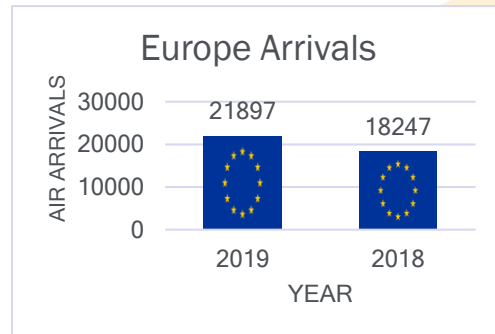


CHART 12 Source: Air Stats: Immigration E/D Cards

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.

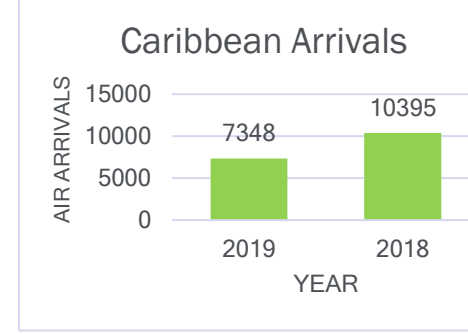


CHART 13 Source: Air Stats: Immigration E/D Cards

Caribbean Arrivals
Arrivals from the Caribbean decreased by 29%

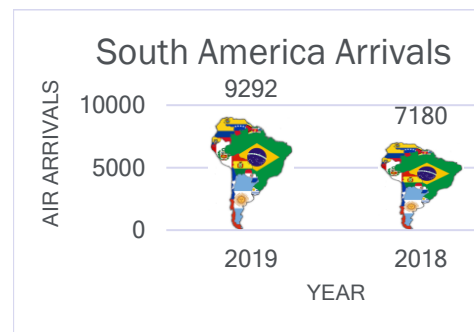


CHART 14 Source: Air Stats: Immigration E/D Cards

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

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

CHART 15 Source: Cruise Stats: Grand Turk Cruise Center



Number of Cruise Ships For 2019 by Month

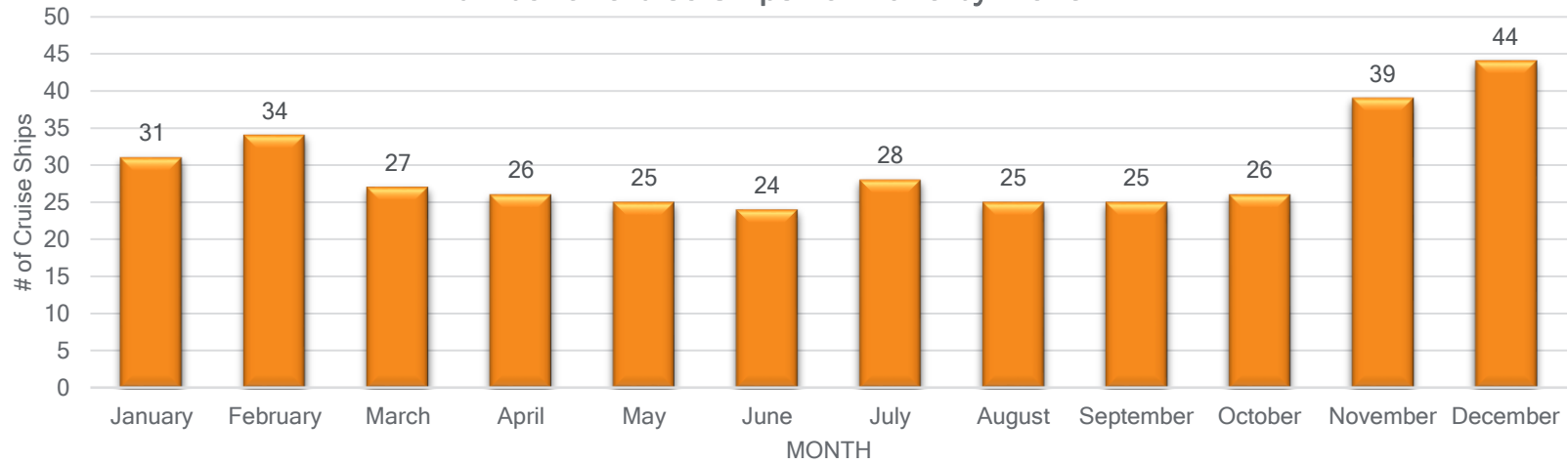


CHART 16 Source: Cruise Stats: Grand Turk Cruise Center

Number of Cruise Ship Passengers For 2019 by Month

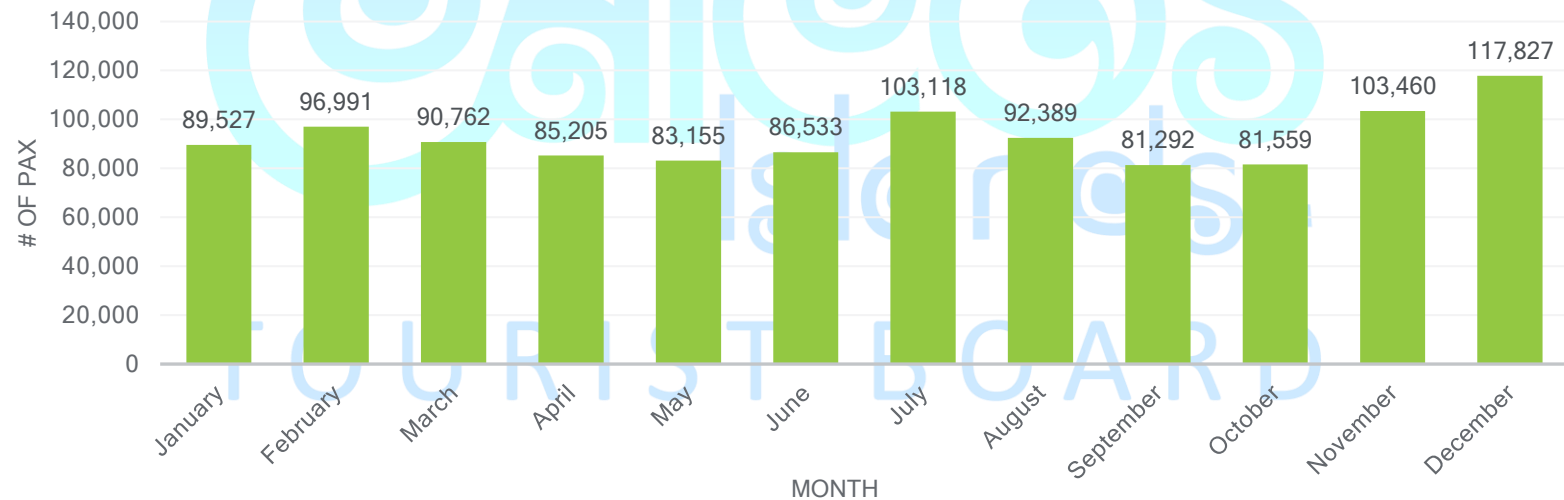


CHART 17 Source: Cruise Stats: Grand Turk Cruise



Total Number of Cruise Ships per Year

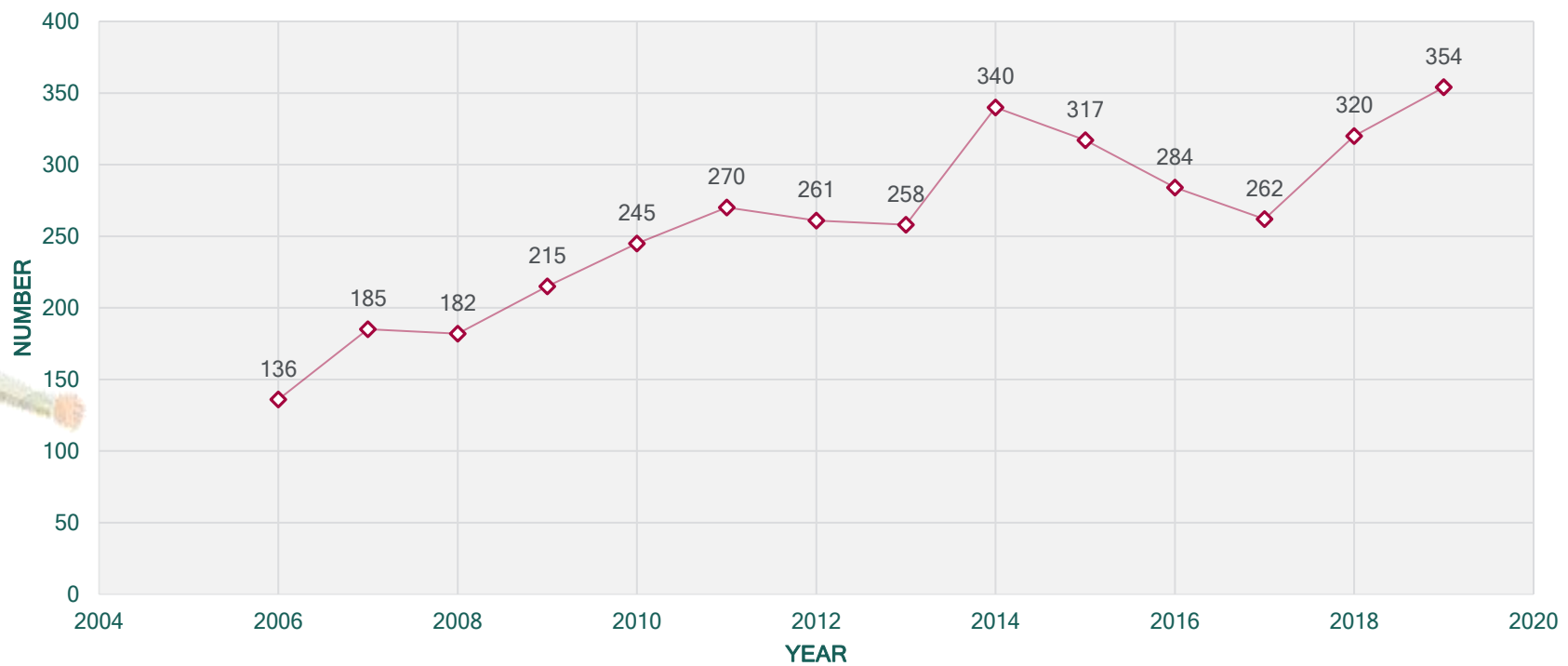
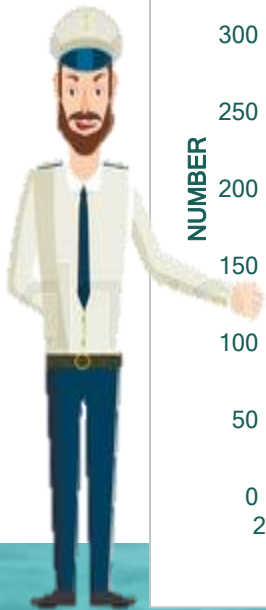


CHART 18 Source: Cruise Stats: Grand Turk Cruise



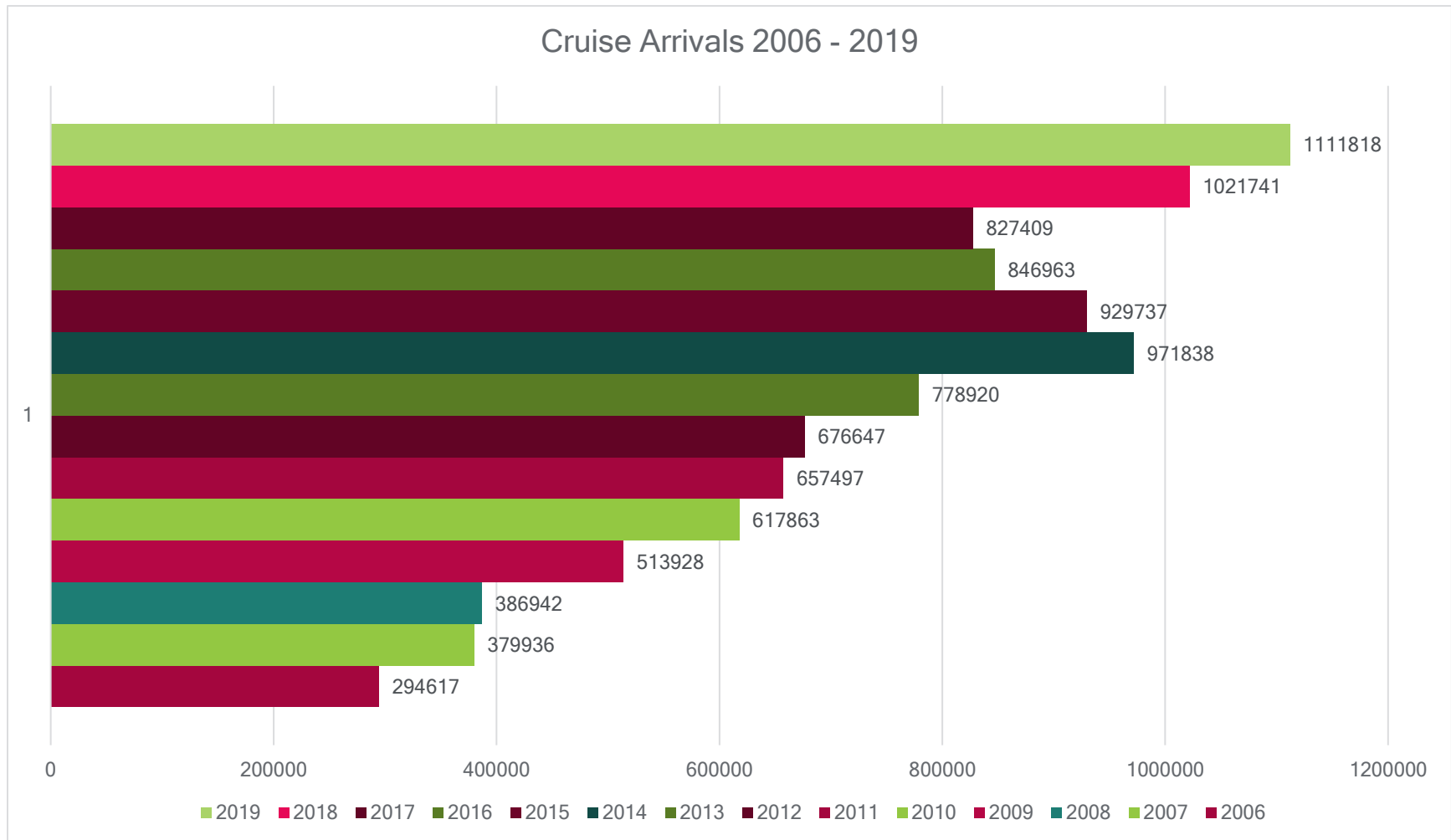


CHART 19 Source: Cruise Stats: Grand Turk Cruise

Cruise Visitors by Nationality



PASSENGERS BY NATIONALITY FOR 2019



CHART 20 Source: Cruise Stats: Grand Turk Cruise Center

Accommodation Statistics

Properties By Island - 2019

	Hotels	Condo Hotels	Villas	Other
Providenciales	12	26	129	9
Grand Turk	3	0	3	0
South Caicos	2	0	0	0
North Caicos	2	0	23	1
Middle Caicos	0	0	1	0
Parrot Cay	0	0	6	0
TOTAL	19	26	162	10

CHART 21

Source: Turks and Caicos Islands Tourist Board

Registered Properties Room Count 2019

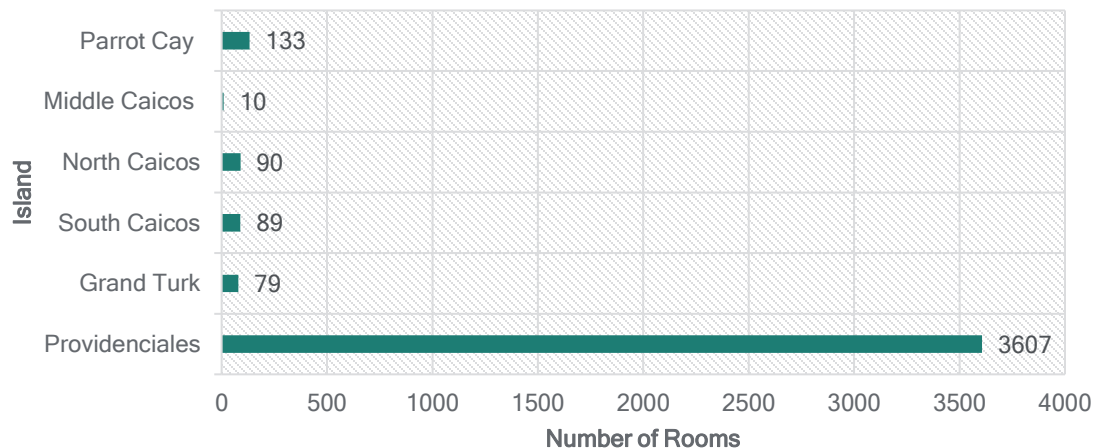


CHART 22

Source: Turks and Caicos Islands Tourist Board



The Turks and Caicos Islands Tourist Board currently keeps record of all registered properties and their associated room counts, for units comprising 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.

Vacation Rental Statistics

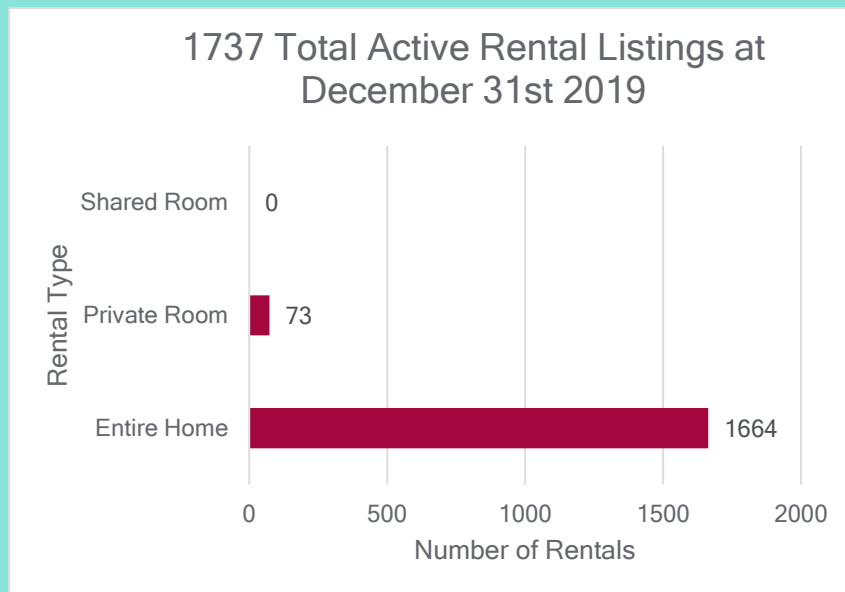


CHART 23 Source: AirDNA

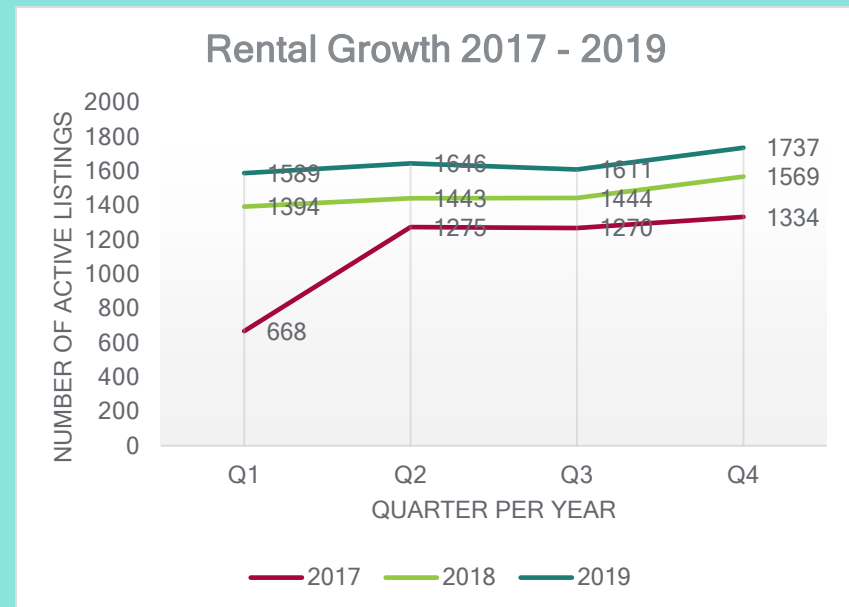


CHART 24 Source: AirDNA

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 placed 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



Outlook 2019



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. These 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 tradeshow. 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:

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