

## TOURISM STATISTICS 2014 – TURKS AND CAICOS ISLANDS

*as of December 31, 2014*

The year 2014 will indeed set a new benchmark for tourism in the Turks and Caicos Islands, as the destination welcomed and hosted some 1,407,313 visitors, this number reflects record increases in both stop-over and cruise passenger arrivals from all our major source markets. According to official data analyzed by the Turks and Caicos Tourist Board's Statistics Office, tourism arrivals for 2014 showed a 31.6% increase when compared to 2013. Further assessment of the 1,407,313 shows: 435,475 visitors were stop-over guest arriving primarily at the Providenciales International Airport (PLS) and 971,838 visitors came via cruise.

### Turks and Caicos Overall Arrivals Comparing 2013 to 2014

	2014			2013			
Month	Stop-Over Arrivals	Cruise Arrivals	Totals	Stop-Over Arrivals	Cruise Arrivals	Totals	% Change
January	31,155	95,517	126,672	24,353	77,144	101,497	24.8
February	32,962	72,862	105,824	24,771	66,389	91,160	16.1
March	41,389	84,303	125,692	31,887	29,355	61,232	105.3
<b>1st Quarter</b>	<b>105,506</b>	<b>252,682</b>	<b>358,188</b>	<b>81,001</b>	<b>172,888</b>	<b>253,889</b>	<b>41.1</b>
April	34,212	74,092	108,304	28,780	44,495	73,275	47.8
May	28,779	71,586	100,365	23,413	69,184	92,597	8.4
June	30,850	79,230	110,080	25,844	54,785	80,629	36.5
<b>2nd Quarter</b>	<b>93,841</b>	<b>224,908</b>	<b>318,749</b>	<b>78,037</b>	<b>168,464</b>	<b>246,501</b>	<b>29.3</b>
July	34,206	97,646	131,852	28,562	55,574	84,136	56.7
August	30,175	73,973	104,148	25,203	75,699	100,902	3.2
September	14,673	66,413	81,086	11,443	62,564	74,007	9.6
<b>3rd Quarter</b>	<b>79,054</b>	<b>238,032</b>	<b>317,086</b>	<b>65,208</b>	<b>193,837</b>	<b>259,045</b>	<b>22.4</b>
October	36,388	68,553	104,941	15,712	69,236	84,948	23.5
November	53,375	81,094	134,469	21,881	82,043	103,924	29.4
December	67,311	106,569	173,880	28,738	92,452	121,190	43.5
<b>4th Quarter</b>	<b>157,074</b>	<b>256,216</b>	<b>413,290</b>	<b>66,331</b>	<b>243,731</b>	<b>310,062</b>	<b>33.3</b>
<b>YTD</b>	<b>435,475</b>	<b>971,838</b>	<b>1,407,313</b>	<b>290,587</b>	<b>778,920</b>	<b>1,069,497</b>	<b>31.6</b>

*Source: Turks and Caicos Tourist Board Statistics Office*

The destination recorded increases in both stop-over and cruise arrivals in each month of 2014, when compared to 2013. Overall arrivals to the Turks and Caicos Islands grew by an astonishing

41.1% in the first quarter of 2014 alone; a combined total of 358,188 visitor arrivals to the destination, which is 104,437 more visitor arrivals than in the corresponding period in 2013. The 358,188 total arrivals for the first quarter of 2014 represents 105,506 stop-over visitors and 252,682 visitors arriving by cruise ship. In the second and third quarters of 2014, the destination continued to witness healthy increases in overall arrivals of 29.3% and 22.4% respectively. The fourth quarter surged by 33.3% when compared to the same quarter period in 2013.

## Stop-Over Arrivals

Statistically, the stop-over arrivals to the Turks and Caicos doubled in 2014, reflecting a record-breaking 49.9% increase comparing arrivals of 290,587 in 2013 to 435,475 in 2014. Stop-over arrivals to the destination via private aircraft reflected a significant increase when comparing arrivals in 2013 to 2014; however stop-over arrivals via private aircraft were excluded from the overall statistical information for both years as the recordings lacked demographical details.

### Turks and Caicos Stop-Over Arrivals 2014

Month	2014	2013	% Change
January	31,155	24,353	27.9
February	32,962	24,771	33.1
March	41,389	31,887	29.8
<b>1<sup>st</sup> Quarter</b>	<b>105,506</b>	<b>81,001</b>	<b>30.3</b>
April	34,212	28,780	18.9
May	28,779	23,413	22.9
June	30,850	25,844	19.4
<b>2<sup>nd</sup> Quarter</b>	<b>93,841</b>	<b>78,037</b>	<b>20.3</b>
July	34,206	28,562	19.8
August	30,175	25,203	19.7
September	14,673	11,443	28.2
<b>3<sup>rd</sup> Quarter</b>	<b>79,054</b>	<b>65,208</b>	<b>21.2</b>
October	36,388	15,712	131.6
November	53,375	21,881	143.9
December	67,311	28,738	134.2
<b>4<sup>th</sup> Quarter</b>	<b>157,074</b>	<b>66,331</b>	<b>136.8</b>
<b>YTD</b>	<b>435,475</b>	<b>290,587</b>	<b>49.9</b>

Source: Turks and Caicos Tourist Board Statistics Office

### **Regional Destinations Performance**

According to a recent report from the Caribbean Tourism Organization (CTO), the Caribbean reported record tourist arrivals in 2014. The region welcomed an estimated 26.3 million tourists last year, a 5.3% increase over the previous year.

A snapshot of the CTO's figures for 2014, released on February 11, 2015 showed destinations in the region recorded stop-over arrivals as stated below:

- Antigua and Barbuda down 2.5% (through December)
- Aruba up 9.5% (through December)
- Bahamas up 3.5% (through July)
- Barbados up 0.2% (through November)
- Bermuda down 5.2% (through November)
- Cayman Islands up 10.8% (through December)
- Cuba up 5.3% (through December)
- Dominican Republic up 9.6% (through December)
- Grenada up 18.4% (through December)
- Jamaica up 3.6% (through December)
- Puerto Rico up 6.6% (through October)
- Saint Lucia up 6.1% (through December)
- U.S. Virgin Islands up 3.9% (through November)

The fourth quarter of 2014 posted the greatest growth in stop-over arrivals for the Turks and Caicos Islands – an impressive 136.8% increase than the same quarter in 2013. The fourth quarter accounted for 157,074 stop-over arrivals; of significance the typically-slow October welcomed 36,399 stop-over arrivals, an impressive 131.6% increase; November saw the greatest growth, up 143.9% welcoming 53,375 stop-over arrivals when compared to November 2013; whilst December saw the most stop-over arrivals of any given month, hosting 67,311 visitors for an increase of 134.2% in stop-over arrivals compared to December 2013.

**Turks and Caicos Stop-Over Arrivals by Major Markets**

	<b>2014</b>	<b>% Share</b>	<b>2013</b>	<b>% Share</b>	<b>% Change</b>
USA	351,623	80.7	231,651	79.7	51.8
Canada	47,413	10.9	31,797	10.9	49.1
Europe	9,961	2.3	6,671	2.3	49.3
Other	26,478	6.1	20,468	7.0	29.4
<b>TOTAL</b>	<b>435,475</b>	<b>100.0</b>	<b>290,587</b>	<b>100.0</b>	<b>49.9</b>

*Source: Turks and Caicos Tourist Board Statistics Office*

The United States remains the leading market generator representing 80.7% of all stop-over arrivals; due in part to the accessibility, frequency of flights from most major gateways in the United States, coupled with increased airlift to the destination in 2014. Stop-over arrivals from the United States in 2014 grew by an impressive 51.8% in comparison to 2013. The total number of stop-over arrivals from the United States in 2014 was 351,623.

The same CTO report also showed data for tourist arrivals from the United States to other regional destinations. The data suggests that travel from the United States to the Caribbean has increased overall in 2014 compared to 2013:

- Antigua and Barbuda up 7.6% (through December)
- Aruba up 3.7% (through December)
- Bahamas down 2.7% (through July)
- Barbados down 4.1% (through November)
- Bermuda down 1.7% (through March)
- Cayman Islands up 8.5% (through December)
- Dominican Republic up 12.4% (through December)
- Jamaica up 2.0% (through December)
- Puerto Rico up 6.7% (through October)
- Saint Lucia up 11.2% (through December)

**Turks and Caicos Stop-Over Arrivals by Target Markets**

	<b>2014</b>	<b>% Share</b>	<b>2013</b>	<b>% Share</b>	<b>% Change</b>
USA	351,623	80.7	231,651	79.7	51.8
Canada	47,413	10.9	31,797	10.9	49.1
United Kingdom	5,293	1.2	3,267	1.1	62.0
Italy	1,568	0.4	1,804	0.6	-13.1
France	927	0.2	727	0.3	27.5
Other EU	2,173	0.5	873	0.3	148.9
Brazil	2,017	0.5	1,185	0.4	70.2
Caribbean	19,813	4.5	16,114	5.5	23.0
Other	4,648	1.1	3,169	1.1	46.7
<b>TOTAL</b>	<b>435,475</b>	<b>100.0</b>	<b>290,587</b>	<b>100.0</b>	<b>49.9</b>

*Source: Turks and Caicos Tourist Board Statistics Office*

Similarly, the destination’s second largest source market, Canada, performed tremendously with a total of 47,413 stop-over arrivals in 2014. The Canadian market showed an increase of 49.1% compared to the same period in the previous year.

The stop-over data analyzed for the European source markets signified a resurgence of interest in travel and leisure in the Turks and Caicos. The European markets showed an overall growth of 49.3%. Stop-over arrivals from the United Kingdom grew by 62% year-over-year. Similarly, stop-over arrivals from France continued its steady growth in 2014, recording an increase of 27.5%. Interest from other European nations including Germany, Luxemburg, Spain and Switzerland, etc. more than doubled, collectively showing an increase of 148.9% in 2014 when compared to 2013. However, it should be noted that Italy was the only European source market that underperformed for the Turks and Caicos in 2014. Italy’s numbers were down 13.1% in 2014 when compared to 2013.

Together the European market recorded 9,961 stop-over arrivals to the destination in 2014, up from 6,671 in 2013. A breakdown in stop-over arrivals from the European region reveals 5,293 visitors from the United Kingdom; 927 visitors from France; 1,568 visitors from Italy; and 2,173 visitors from other European nations.

The destination’s newest source market, Brazil, recorded 2,017 stop-over arrivals. The stop-over arrivals from Brazil grew by 70.2% in 2014 when compared to 2013. Increases in visitors from the Eastern Caribbean have also been a noted trend. 19,813 stop-over arrivals were welcomed from the Caribbean region, an increase of 23% year-over-year. 4,648 stop-over arrivals visited the Turks and Caicos from the rest of the world, including countries in Asia, Africa and the Pacific. Stop-over arrivals from the rest of the world increased by 46.7% when compared to arrivals of 3,169 in 2013.

## Cruise Arrivals

**Turks and Caicos Cruise Passenger Arrivals 2014**

	2014		2013		% Change	
	Calls	Passengers	Calls	Passengers	Calls	Passengers
January	40	95,517	29	77,144	37.9	23.8
February	27	72,862	24	66,389	12.5	9.8
March	35	84,303	12	29,355	191.7	187.2
<b>1<sup>st</sup> Quarter</b>	<b>102</b>	<b>252,682</b>	<b>65</b>	<b>172,888</b>	<b>56.9</b>	<b>46.2</b>
April	25	74,092	13	44,495	92.3	66.5
May	24	71,586	20	69,184	20.0	3.5
June	24	79,230	15	54,785	60.0	44.6
<b>2<sup>nd</sup> Quarter</b>	<b>73</b>	<b>224,908</b>	<b>48</b>	<b>168,464</b>	<b>52.1</b>	<b>33.5</b>
July	28	97,646	15	55,574	86.7	75.7
August	24	73,973	20	75,699	20.0	-2.3
September	21	66,413	18	62,564	16.7	6.2
<b>3<sup>rd</sup> Quarter</b>	<b>73</b>	<b>238,032</b>	<b>53</b>	<b>193,837</b>	<b>37.7</b>	<b>22.8</b>
October	23	68,553	22	69,236	4.5	-1.0
November	31	81,094	31	82,043	0.0	-1.2
December	41	106,569	39	92,452	5.1	15.3
<b>4<sup>th</sup> Quarter</b>	<b>95</b>	<b>256,216</b>	<b>92</b>	<b>243,731</b>	<b>3.3</b>	<b>5.1</b>
<b>YTD</b>	<b>343</b>	<b>971,838</b>	<b>258</b>	<b>778,920</b>	<b>32.9</b>	<b>24.8</b>

*Source: Turks and Caicos Tourist Board Statistics Office*

The Grand Turk Cruise Center greeted the largest amount of visitors ever to its shores in 2014 welcoming 971,838 cruise passengers. Cruise passenger arrivals increased by 24.8% year-over-year. The Cruise Center also welcomed 32.9% more ship calls than the previous year. 343 ships were hosted at the port in 2014 compared to 258 ships in 2013.

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In the first three quarters of 2014, the Grand Turk Cruise Center posted double-digit increases in both port calls and passenger arrivals when compared to 2013. The months of March, April, June and July saw the greatest performance gains of 2014.

March 2014 saw 187.2% more cruise passenger arrivals than March 2013. The recorded growth rate of 2014 is of great significance as the months of March and April in the year 2013 saw a huge dip in ship calls and cruise passenger arrivals. Ship calls in 2013 were down 67.6% and 48% respectively when compared to 2012. Also in 2013, cruise passenger arrivals were down 66.3% and 31.4% respectively, due to the closure of the Grand Turk Cruise Center in mid-March for three weeks.

The 187.2% increase in cruise passenger arrivals in March 2014 tallied 84,303 arrivals. There were 74,092 cruise passenger arrivals in April 2014, an increase of 66.7% when compared to April 2013; 79,230 cruise passenger arrivals in June 2014, an increase of 44.6% over the same time in 2013; and an increase of 77.4% in the month of July 2014 when compared to the same time in 2013, tallying 97,646 arrivals. The month of December 2014 however saw the most cruise passenger arrivals. The Grand Turk Cruise Center accommodated 106,569 cruise passengers in December 2014. This is an increase of 15.3% when compared to December 2013.

Projections throughout last year showed the Turks and Caicos was on target to welcome 1 million arrivals via the Grand Turk Cruise Center alone. The destination fell 2.8% percent shy of this projection, welcoming 28,162 less cruise passengers off its target. A slightly weaker performance in the fourth quarter of 2014, as well as in the month of August 2014, when compared to the same time period in 2013 is evident. The destination welcomed 2.3% less cruise passengers in August 2014, 1% less cruise passengers in October 2014, and 1.2% less passengers in November 2014 when compared to the same months in 2013.

CTO's latest statistical report on cruise passenger arrivals by destinations in the region, positions the Turks and Caicos Islands well among the top cruise destinations. The data shows:

- Antigua and Barbuda down 2.2% (through December)
- Aruba down 1.3% (through November)
- Bahamas up 2.9% (through October)
- Barbados down 2.3% (through November)

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- Belize up 42.9% (through December)
- Bermuda up 5.7% (through November)
- Cayman Islands up 17% (through November)
- Curacao up 6.8% (through December)
- Dominican Republic up 11.1% (through September)
- Jamaica up 12.5% (through December)
- Martinique up 71.3% (through December)
- Puerto Rico up 13.6% (through November)
- Saint Lucia up 2.9% (through November)
- St. Maarten up 15.9% (through October)
- Trinidad and Tobago up 30.1% (through December)

As per the above CTO data, released on February 11, 2015 the Turks and Caicos Islands saw the fourth highest performance gains among all cruise destinations in the Caribbean. Eight Caribbean destinations welcomed more than 1 million cruise passengers each to their ports. The Bahamas was the top cruise destination in 2014, welcoming 3,867,574 cruise passengers (through October) followed by the US Virgin Islands hosting 2,083,890 cruise passengers. The Grand Turk Cruise Center greeted the ninth most cruise passengers of any destination in the Caribbean in 2014.

### **Overview of 2014**

The Turks and Caicos Islands poised itself as the fastest-growing tourism destination in the wider Caribbean region in 2014. The destination recorded its largest number of both cruise passenger and stop-over arrivals yet and saw the most growth in stop-over arrivals of all Caribbean destinations.

The destination continued the diversification of its source markets and improved on strengthening its market share in what is considered the typical slower months for the region – August, September, and October.

The destination contributes the tremendous growth in visitor arrivals to a number of factors, including Mother Nature – for an unseasonably cold weather in North America. Director of Tourism, Mr. Ralph L. Higgs noted, “The accessibility to our destination is perhaps the biggest contributing factor to the exceptional growth experienced in 2014. We have reliable and convenient airlift from most of the major gateways in North America, and we’ve also included additional lift from JFK in New York, and out of Boston’s Logan International Airport.” Higgs added, “There’s also a boosted co-op marketing campaign with the Tourist Board and some of its private sector partners. We’ve strengthened our co-op relationship with many of the travel agents and major wholesales that sell the Turks and Caicos and fostered new relationships with major wholesales in Latin America – all contributing factors to our increases.”

Of historical fact, the Turks and Caicos have maintained double-digit growth even during the recent years of financial downturn. The destination’s strong branding and positioning, as well as, the recession-proof clientele that patronizes the Turks and Caicos keeps the destination on track for a steady annual performance.

President of the Turks and Caicos Hotel and Tourism Association (TCHTA), Mr. Michel Neutelings noted, “The result of increased arrivals is attributed to the combined marketing efforts of the TCHTA, the individual hotel properties, airlines, cruise port, minor stakeholders and the Tourist Board.”

Moving forward, the Turks and Caicos Tourist Board’s strategy includes prioritizing the diversification of its source markets and looking closely at markets with opposite seasons to North America. The destination also seeks to continually strengthen its growth in the summer months. In addition, the Turks and Caicos Islands is working to expand its hotel product beyond the traditional hub of Providenciales and Grace Bay Beach to the other beautiful islands, as demand for additional accommodation, attractions, and niche offerings has increased.

The Tourist Board, and its partners, will also continue to increase the destination’s presence within the market place by embarking on a series of travel and trade shows. Traditional and non-traditional media strategies, sponsorships, and promotional events in the United States, Canada, Europe and Latin America will also continue.