

# 2020 TOURISM STATISTICS REPORT



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# Table of Contents

Executive Summary	3
2020 Highlights	6
Visitor Arrivals Historical Arrival Totals	7
Visitors by Month 2020	8
Land Based Arrivals by Country of Origin	10
Land Based Arrivals by Country of Origin 2020 vs 2019	11
Land Based Arrivals 2020 Major Markets	12
Cruise Statistics	13
Cruise Arrivals by Nationality	17
Accommodation Statistics	18
Outlook for 2020	19
Research Methodology	21



# EXECUTIVE SUMMARY

The COVID-19 pandemic brought global tourism to a near-complete standstill. As countries shuffle to implement measures that would protect their people and mitigate the spread globally; borders closed, hotels shut, air travel dropped dramatically, cruise vessels stop sailing and persons working within the industry now finding themselves jobless.

The UNWTO, in their *Impact Assessment of the COVID-19 Outbreak on International Tourism* report projected an overall decline of 70 to 75% for the whole of 2020, further stating that international tourism could have returned to levels of 30 years ago. The Turks and Caicos Islands was not spared from the economic impact of the Covid-19 crisis. Tourism represents significant shares of gross domestic product (GDP) and employment in the Turks and Caicos Islands as in other Caribbean countries. All over the world, tourism-dependent economies are working to finance a broad range of policy measures to soften the impact of plummeting tourism revenues.

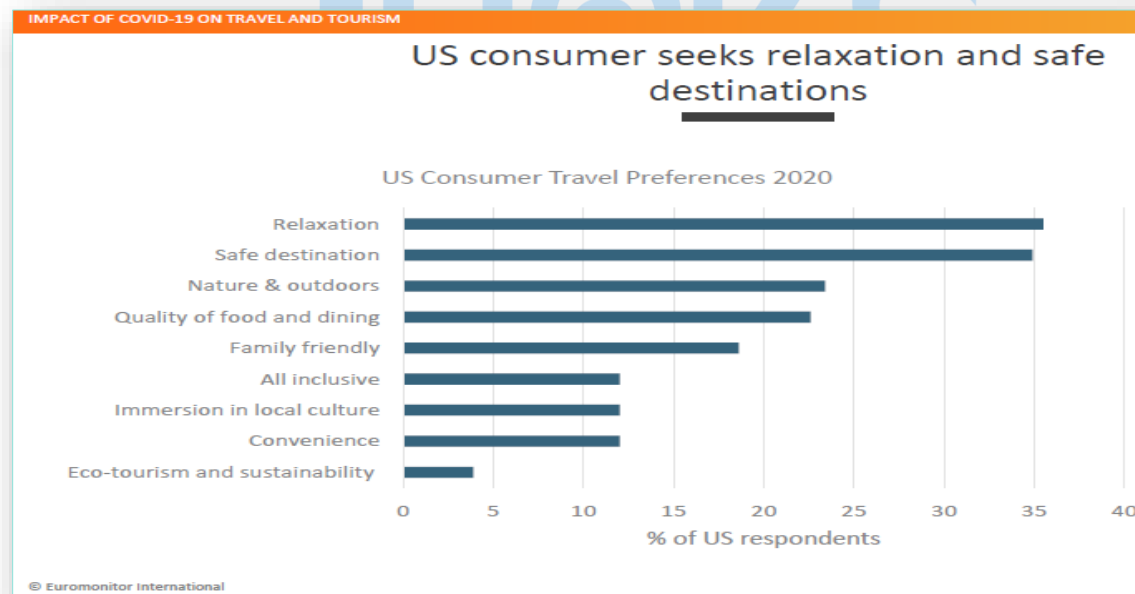
This 2020 Tourism Statistics report shows the detrimental impact on international tourism here in the Turks and Caicos Islands as a result of the global Virus outbreak.

Overall visitors down 77 percent compared to 2019, Stop Over Arrivals down 66 percent compared to 2019, the Cruise industry remained paralyzed at the end of the year with no arrivals since border closure in March 2020; Arrivals were down 81 percent compared to 2019. Number of Cruise Vessels at port down 81% percent compared to 2019.

Stop over arrivals from major markets United States, Canada and Europe all report a decline of 65, 62 and 79 percent respectively. Stop Over Arrivals to the Turks and Caicos Islands for the year 2020 recorded a 13% increase during the first two months. However, the outlook changed drastically with the global concern of COVID-19, and rising cases in our major source markets (US, Europe and Canada). March 2020 Stopover arrivals was down by 53% when compared to the previous year. March 24 2020, The Turks and Caicos Islands borders were closed as the Government of these islands moved swiftly to deploy measures that would promote safety and lessen the impact of the pandemic on its citizens.



The Turks and Caicos Islands borders reopened for regional and international travel 22nd July 2020 with stringent protocols in place to ensure the safety and well-being of locals and visitors alike. A total of 9,937 Overall Visitor Arrivals were recorded for the Third Quarter of 2020. A 90 percent decrease of arrivals overall to our shores when compared to the third quarter figures of 2019. The opening of the borders depicted the unwillingness of persons to travel during what can be considered a very traumatic time. Euromonitor International reported on the *Impact on of Covid-19 on Tourism and Travel*. In a survey conducted it was concluded that as for the US Consumer which is our biggest source market their travel preference during this time are destinations which could provide relaxation and safety.



Source: Euromonitor International, Impact of Covid-19 on Travel and Tourism

As the Fourth Quarter rolls in slight increase in visitor arrivals provide a remanent of hope, and resilience for these islands. The Turks and Caicos Islands recorded a 75 percent increase in November 2020 when compared to October 2020 and then a 77 percent increase in December 2020 when compared to November 2020 arrival numbers. Although, Stop Over arrivals declined by 72 percent that quarter when compared to 2019 the slow and gradual increases month over month during this last quarter of the year shows that tourism in the Turks and Caicos Islands persevered. Yet, the evolution of new variants and the efficacy of the vaccines on these variants indicates that much is still uncertain in overcoming this pandemic.



COVID-19 has inflicted an unprecedented impact on economies and how we live. It is important that communities are put at the heart of the rebuilding to ensure everyone is onboard with the phased recovery. The destination and local businesses alike will have to work extra hard to reassure visitors that it is safe to travel, adapting to the new normal and touch-free journey. It requires countries to now take a more technological approach. The tourism sector must accelerate its digitalization and make technological innovations in the process of transportation, mobile applications in hotels, and automatic travel insurance to ensure the growth and sustainability of the industry.

This annual 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. The statistical data is provisional and is subject to change.



# Highlights

# 2020

Comparing 2020 and 2019

**370,406**

**TOTAL VISITOR  
ARRIVALS**

A decline of 77% Overall Visitor Arrivals when compared to 2019



**81% ↓**

**Cruise Passenger  
Arrivals**



**81% ↓**

**Number of Cruise  
Vessels**



**66% ↓**

**Stop Over Arrivals**



**Stop Over Arrivals from  
Major Markets**

United States	<b>65% ↓</b>
Canada	<b>62% ↓</b>
Europe	<b>79% ↓</b>

# Historical Arrival Totals

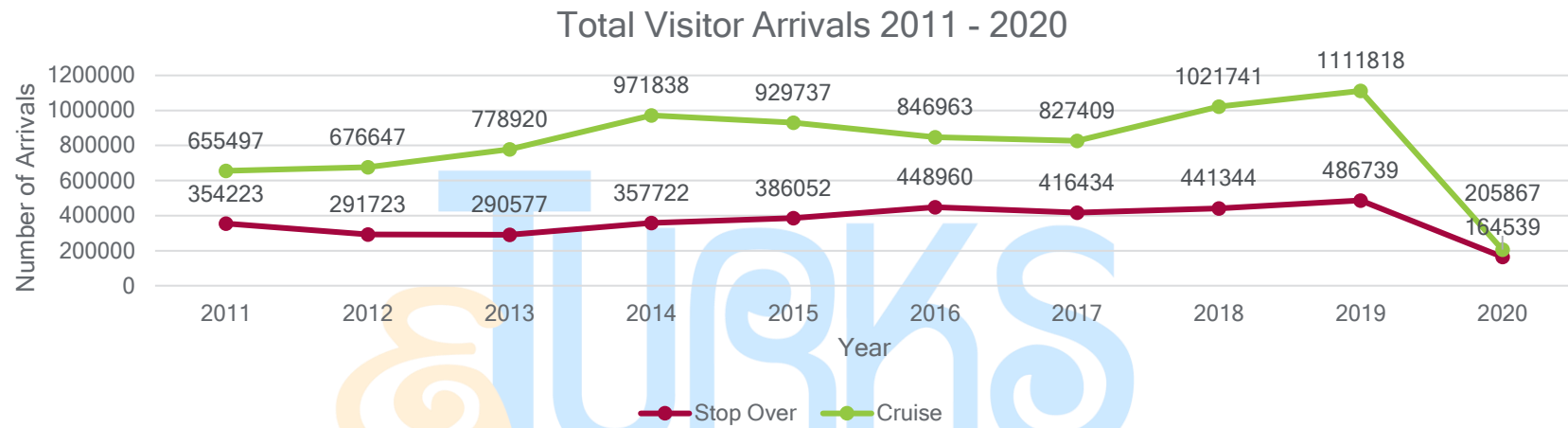


CHART 1, 2

Source: Air Stats: Immigration E/D Cards  
Cruise Stats: Grand Turk Cruise Center \*P -provisional

## Historical Arrival Totals; Air Arrivals by Month

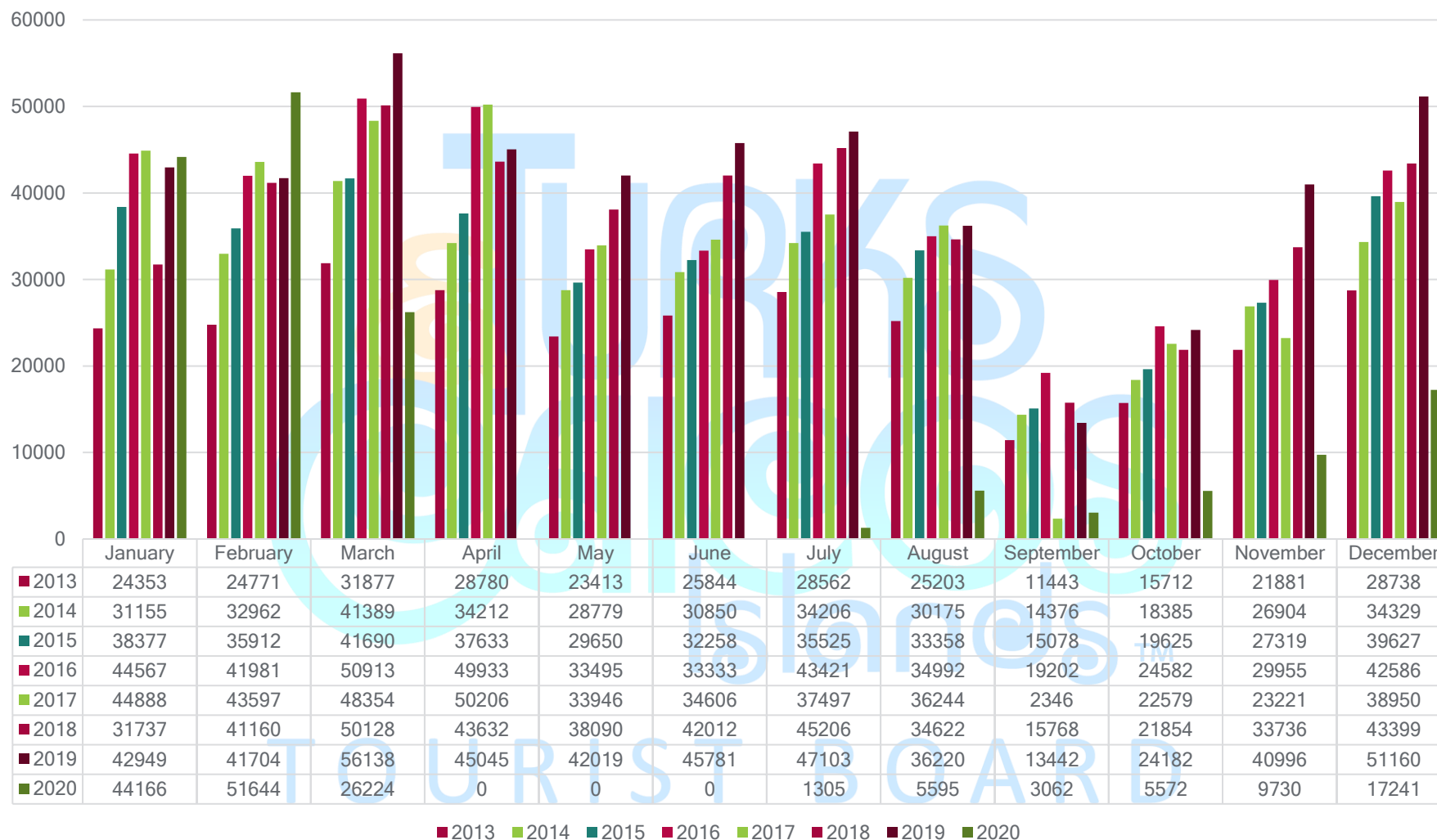


CHART 3

Source: Air Stats: Immigration E/D Cards \*P -provisional



## Visitors by Month 2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Stop Over Arrivals	44,166	51,644	26,224	0	0	0	1,305	5,595	3,062	5,572	9,730	17,241
Cruise Arrivals	93,130	93,235	19,502	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>137,296</b>	<b>144,879</b>	<b>45,726</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,305</b>	<b>5,595</b>	<b>3,062</b>	<b>5,572</b>	<b>9,730</b>	<b>17,241</b>

CHART 4

Source: Air Stats: Immigration E/D Cards  
Cruise Stats: Grand Turk Cruise Center \*P -provisional

Total Visitor Arrivals has seen a massive decrease of 77%. Cruise arrivals account for the majority of the destination's visitor population so with no ship arrivals since border closure in March, the arrival numbers plummet. 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 2020 Visitor Arrivals

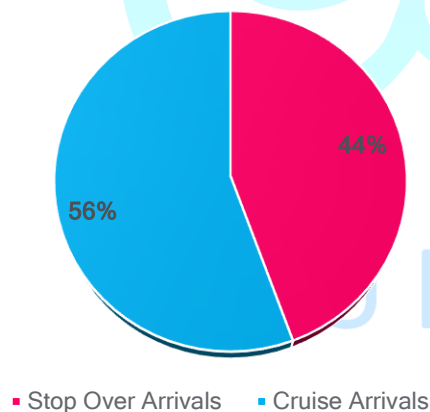


CHART 5

Source: Air Stats: Immigration E/D Cards  
Cruise Stats: Grand Turk Cruise Center \*P -provisional

Overall Arrivals by Month

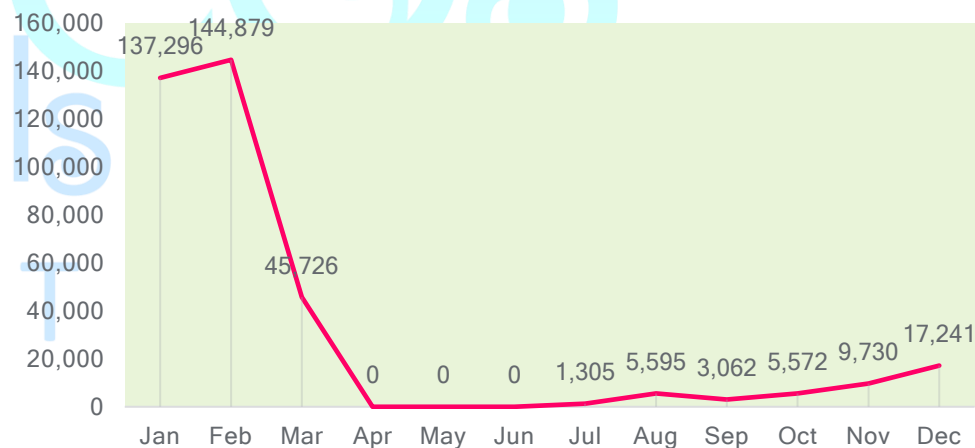


CHART 6

Source: Air Stats: Immigration E/D Cards  
Cruise Stats: Grand Turk Cruise Center \*P -provisional

## Land Based Arrivals by Country of Origin

Month	United States	Canada	Europe	Caribbean	South America	Asia	Rest of the World	Not Stated
January	35575	5342	1515	362	1037	112	220	3
February	43375	6429	1018	234	384	44	121	39
March	22189	2872	645	220	182	58	58	0
April	0	0	0	0	0	0	0	0
May	0	0	0	0	0	0	0	0
June	0	0	0	0	0	0	0	0
July	1200	9	40	18	21	1	16	0
August	5163	158	132	47	51	5	39	0
September	2803	54	83	50	44	1	27	0
October	4930	188	172	80	138	15	49	0
November	8345	568	424	99	145	33	114	2
December	14774	1306	666	178	167	66	84	0
<b>Totals</b>	<b>138354</b>	<b>16926</b>	<b>4695</b>	<b>1288</b>	<b>2169</b>	<b>335</b>	<b>728</b>	<b>44</b>



CHART 7 Source: Air Stats: Immigration E/D Cards \*P -provisional

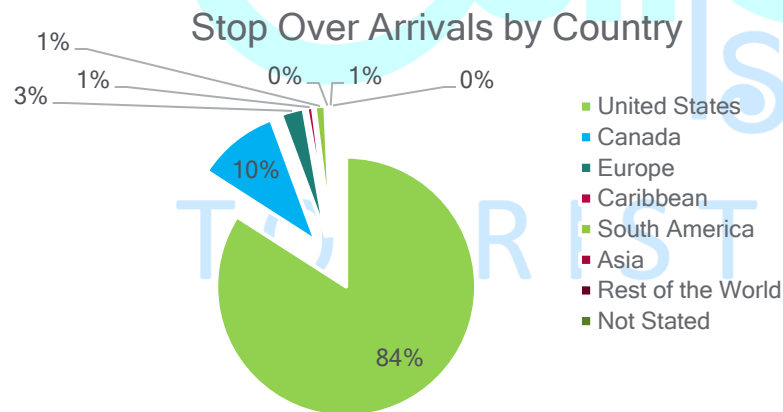


CHART 8 Source: Air Stats: Immigration E/D Cards \*P -provisional

Air visitors from the United States decline by 65% year-over-year and accounted for 84% of the total visitor population. Canadian visitors decreased by 62% and accounts for 10% when compared to the previous year. Europe accounts for 3% of the total respectively.

## Stop Over Arrivals by Country-of-Origin 2020 vs 2019

Performance of Major Markets 2020-2019

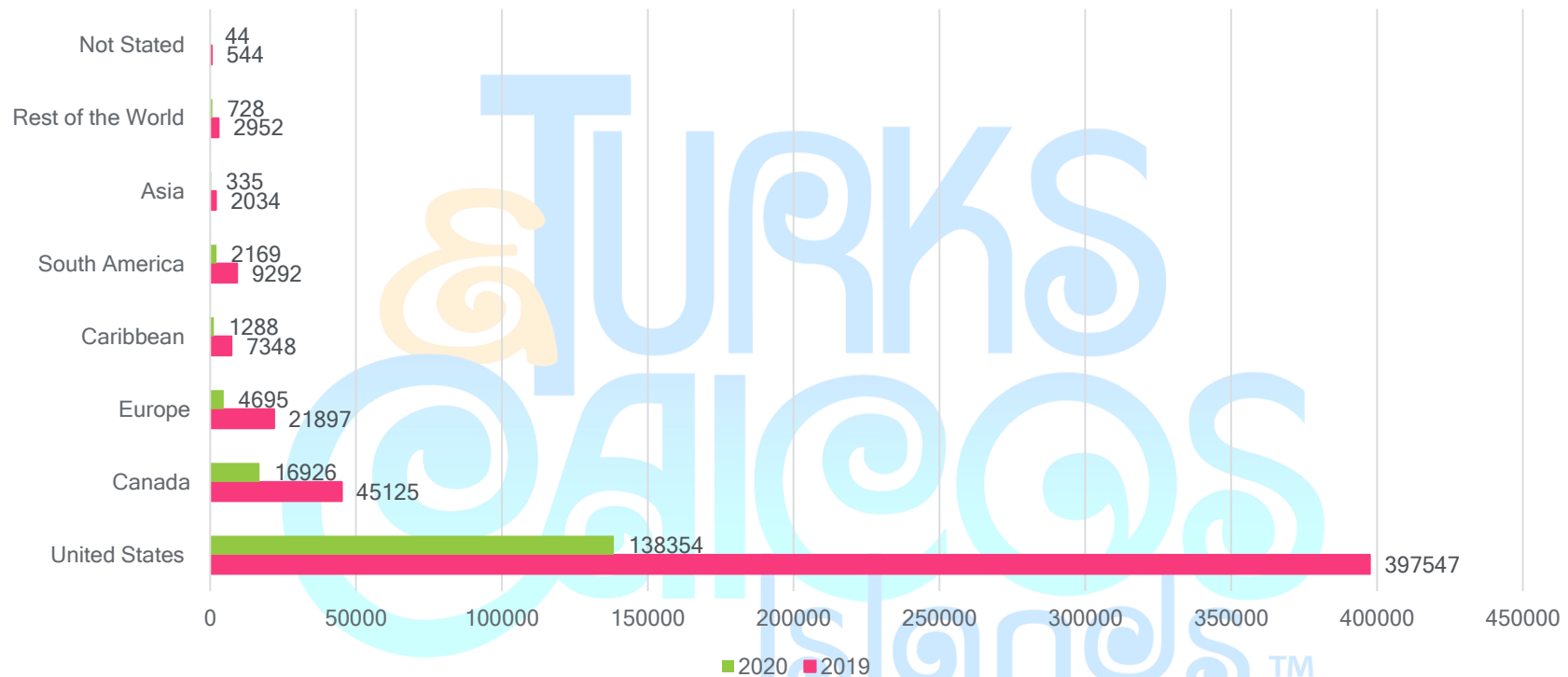


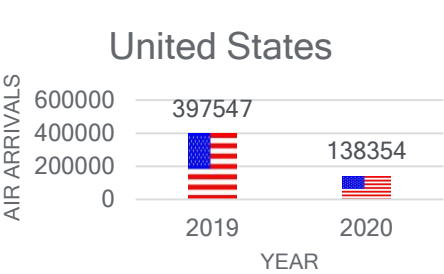
CHART 9

Source: Air Stats: Immigration E/D Cards. \*P -provisional

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.

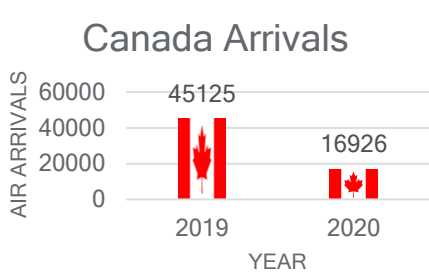


# Stop Over Arrivals 2020 Major Markets



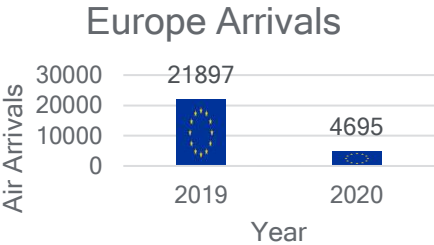
**United States Arrivals**  
Arrivals from the leading source market to the destination totaled 138,354 visitors. When compared to 2019, visitor arrivals from the USA showed a 65% decrease.

CHART 10 Source: Air Stats: Immigration E/D Cards \*P -provisional



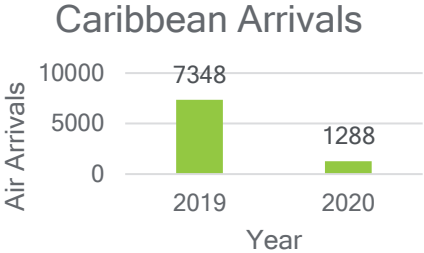
**Canada Arrivals**  
Arrivals from Canada saw an overall decrease of 62%

CHART 11 Source: Air Stats: Immigration E/D Cards \*P -provisional



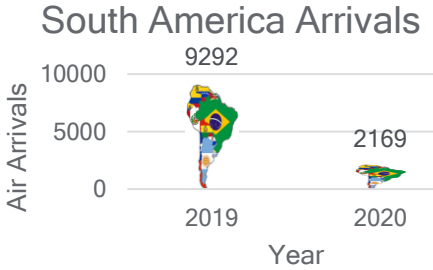
**Europe Arrivals**  
Arrivals from the European market for destination TCI saw a 79% decrease. With the highest share coming out of the UK, France and Italy respectively.

CHART 12 Source: Air Stats: Immigration E/D Cards \*P -provisional



**Caribbean Arrivals**  
Arrivals from the Caribbean decreased by 82%

CHART 13 Source: Air Stats: Immigration E/D Cards \*P -provisional



**South America Arrivals**  
Arrivals from the South American Market predominately Brazil, Argentina indicated a decrease of 77% in arrivals.

CHART 14 Source: Air Stats: Immigration E/D Cards \*P -provisional

# Cruise Visitor Statistics

## NUMBER OF CRUISE SHIPS AND PAX FOR 2020

	2020	Total Pax
January	31	93,130
February	31	93,235
March	7	19,502
<b>QTR 1 TOTAL</b>	<b>69</b>	<b>205,867</b>
April	0	0
May	0	0
June	0	0
<b>QTR 2 TOTAL</b>	<b>0</b>	<b>0</b>
July	0	0
August	0	0
September	0	0
<b>QTR 3 TOTAL</b>	<b>0</b>	<b>0</b>
October	0	0
November	0	0
December	0	0
<b>QTR 4 TOTAL</b>	<b>0</b>	<b>0</b>
<b>GRAND TOTAL</b>	<b>69</b>	<b>205,867</b>

CHART 15 Source: Cruise Stats: Grand Turk Cruise Center \*P -provisional



### Number of Cruise Ships 2020 by Month

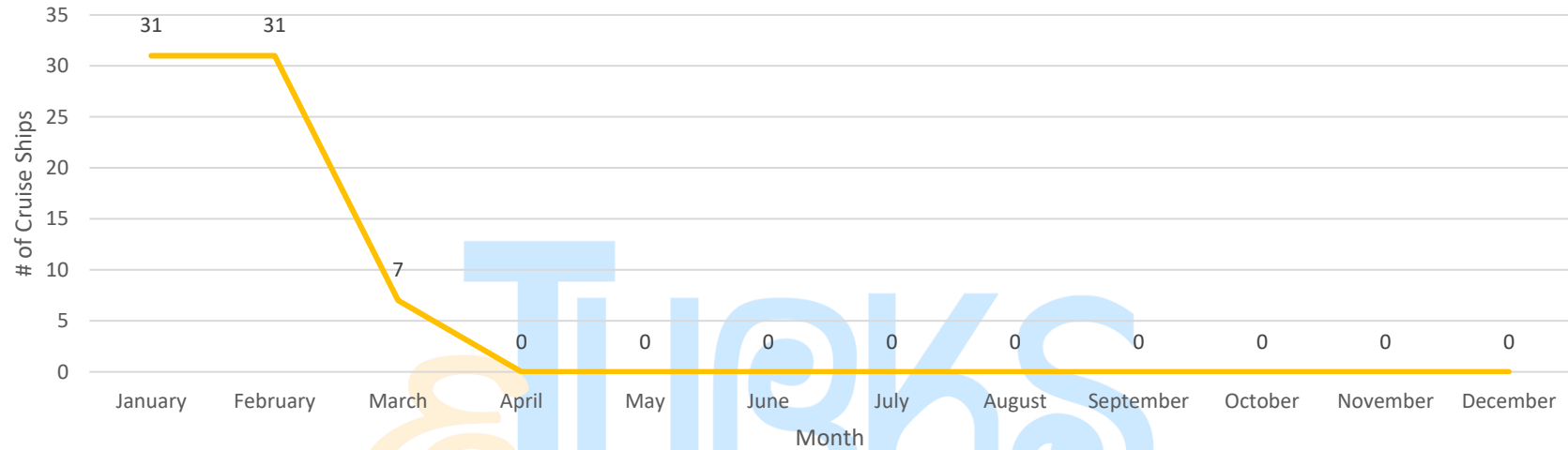


CHART 16 Source: Cruise Stats: Grand Turk Cruise Center \*P -provisional

### Number of Cruise Passengers 2020 by Month

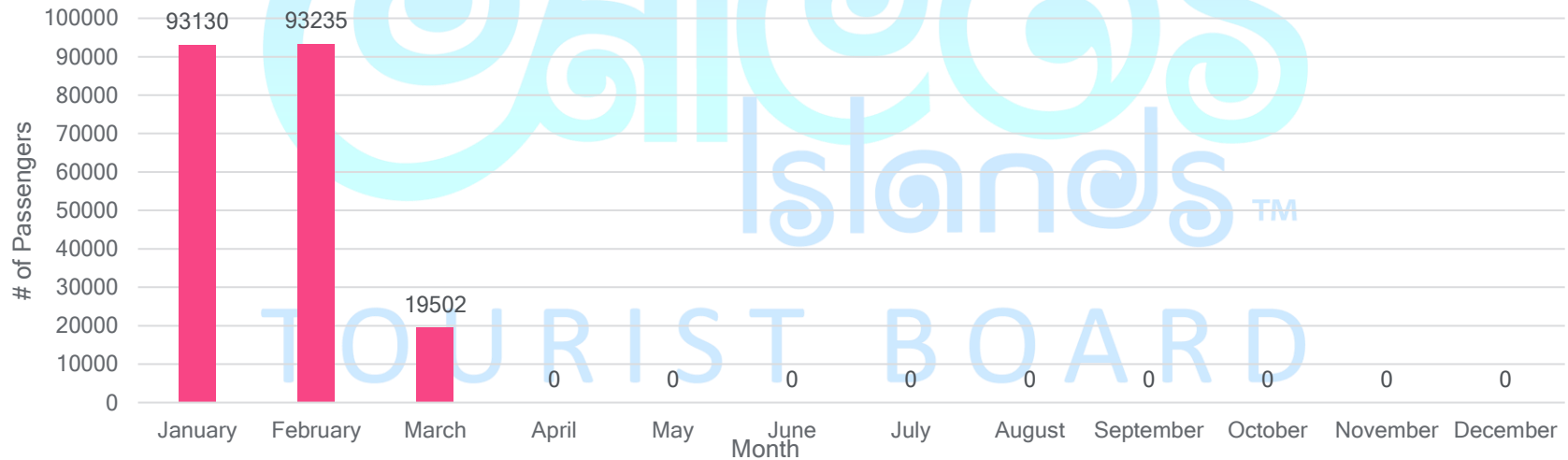


CHART 17 Source: Cruise Stats: Grand Turk Cruise Center \*P -provisional





CHART 18 Source: Cruise Stats: Grand Turk Cruise Center \*P -provisional

## Cruise Arrivals 2006 - 2020

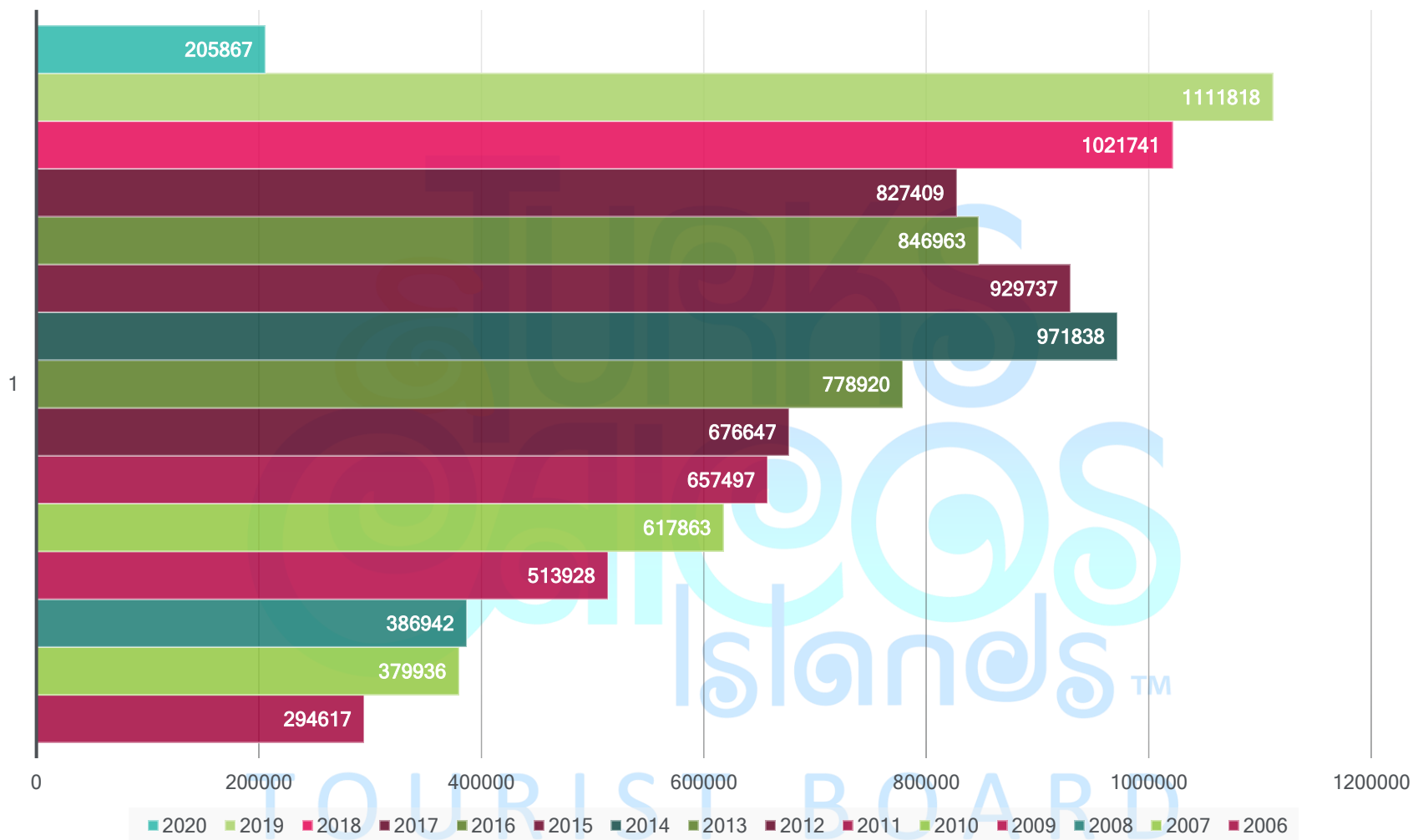
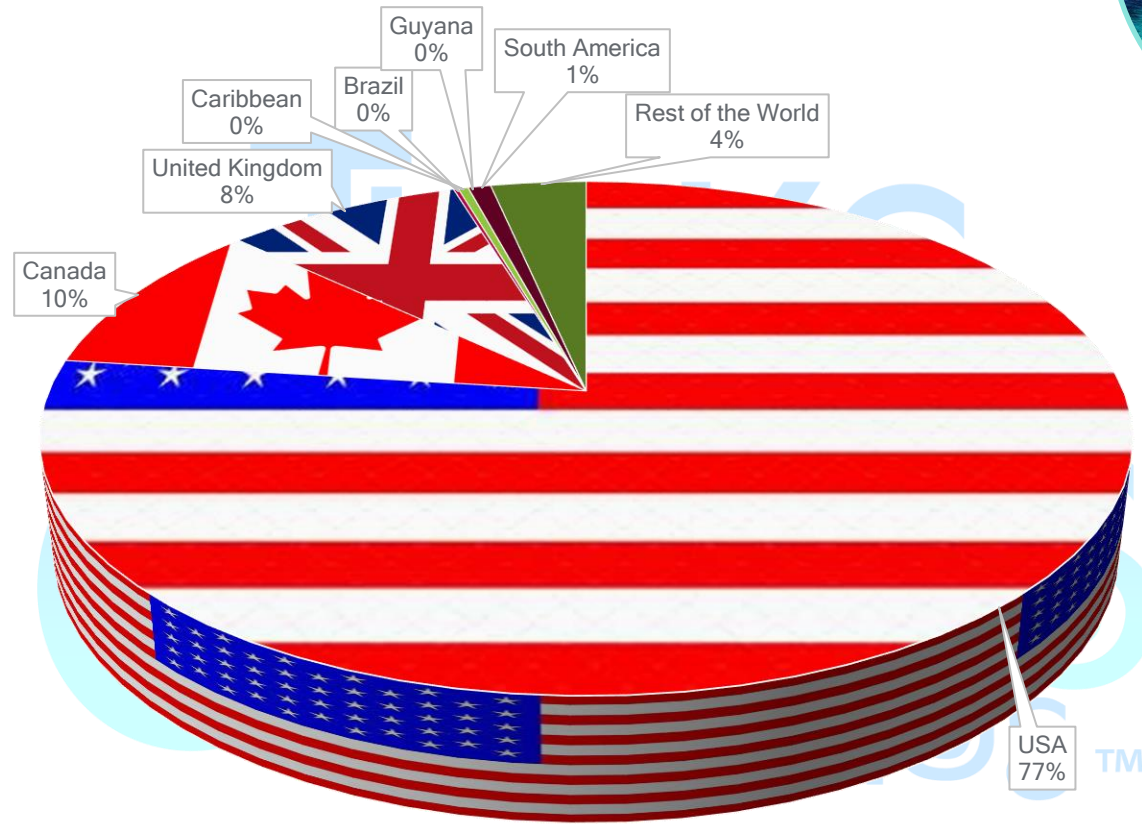


CHART 19

Source: Cruise Stats: Grand Turk Cruise Center \*P -provisional

# Cruise Visitors by Nationality 2020



■ USA 
 ■ Canada 
 ■ United Kingdom 
 ■ Brazil 
 ■ Caribbean 
 ■ Guyana 
 ■ South America 
 ■ Rest of the World

CHART 20 Source: Cruise Stats: Grand Turk Cruise Center \*P -provisional



## Accommodation Statistics

	Hotel	Condo Hotels	Villas
<b>Providenciales</b>	11	29	269
<b>Grand Turk</b>	4	0	10
<b>South Caicos</b>	2	0	0
<b>North Caicos</b>	2	0	30
<b>Middle Caicos</b>	0	0	3
<b>Parrot Cay</b>	1	0	7
<b>Ambergris Cay</b>	1	0	0
<b>Pine Cay</b>	1	0	8
<b>TOTAL</b>	<b>22</b>	<b>29</b>	<b>327</b>

CHART 21

Source: Turks and Caicos Islands Tourist Board \*P -provisional

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

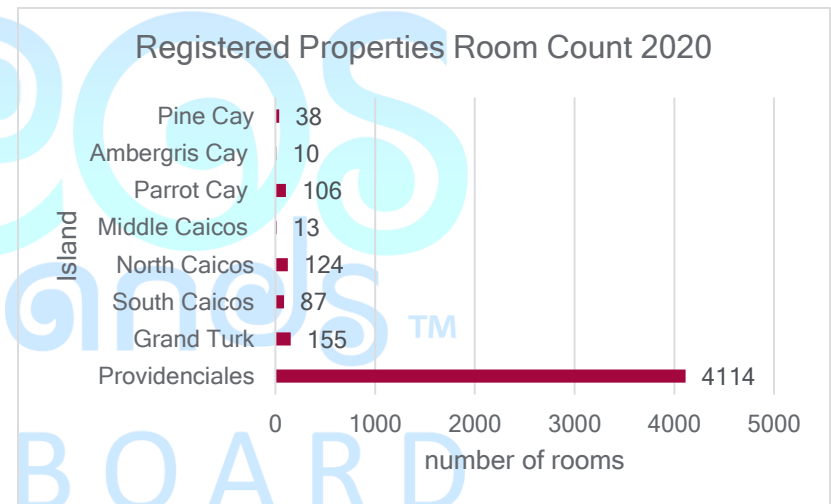


CHART 22

Source: Turks and Caicos Islands Tourist Board \*P - provisional

## Outlook 2020

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. However due to the nature of the pandemic the destination faced many challenges at the being of the year after what appeared to the start of one of the best tourism seasons. The Turks and Caicos Borders closed in March 2020 and didn't reopen until mid-July 2020. Nevertheless, throughout the entire closure period the Tourist Board continuously provided updated information to consumers, travel agents and wholesalers. The Tourist Board's mission was to both provide accurate and up-to-date information on reopening of the destination and continue to promote brand awareness to ensure that Turks & Caicos remained as one of the most sought-after destination in the Caribbean region.

The awareness campaigns utilized videos, social media, international radio and magazines to successfully spread the message that Turks and Caicos would be ready to welcome visitors again. The Tourist Board also outsourced an international Public Relations firm to build relationships with international media and effectively communicate these messages to an international audience.

As soon as the borders reopened for land-based arrivals visitors steadily returned to destination with post-closure arrivals peaking in the winter period. However, cruise-based arrivals have been suspended until sufficient health and safety protocols can be implemented for this industry.

The Tourist Board's marketing strategy was adjusted throughout the year to reflect the market trends. After the reopening of borders, focus shifted towards spreading awareness of new travel related protocols to the destination and ensuring potentials visitors knew that the destination was safe with multiple health related protocols to put in place to protect both visitors and residents. The destination was also awarded the Safe Travels Stamp from the World Travel and Tourism Council (WTTC) due its high safety standards.

Due to the pandemic the islands most negatively impacted were the Sister Islands outside of Providenciales. Thus, the Tourist Board renewed its resolve to promote the various Sisters Islands and coined the new slogan 'Rediscover Our Sister Islands'. Various mediums were used to promote this internationally and domestically such as newsletters, web banners, radio shows, and editorials.

Amongst all the obstacles and changing health and safety regulations the destination still continued to thrive. During this period the destination continued to receive various accolades with Grace Bay Beach being recognized as no. 1 Best Beach in the Caribbean and no. 2 Best Beach in the World according to TripAdvisor 2020 Travelers' Choice® Awards. Additionally, Taylor Bay Beach and Mudjin Harbour were also named among the Top 25 Best Beaches in the Caribbean, Providenciales was honored as one of the Top 10 Popular Destinations in the Caribbean. These awards are a testament to the destination's continued success in the market.

Lastly, the Tourist Board's resolve to work hand in hand with industry stakeholders to promote the destination has not wavered. There have been multiple partnerships for various press trips and advertisements. The Turks and Caicos is expected to steadily recover as more persons become adjusted to the new normal and travel protocols. The Tourism Industry has laid the ground work for a full recovery as soon as a full sense of normalcy has returned.

- 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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