

2018 TOURISM STATISTICS REPORT



**TURKS
CAICOS**
Islands™
TOURIST BOARD

TurksandCaicosTourism.com

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EXECUTIVE SUMMARY

According to the Caribbean Tourism Organization; “Caribbean destinations received an estimated 30.2 million international tourist arrivals in 2018, or some 213.6 thousand fewer than the 30.4 million of 2017. As recovery from the aftermath of the two powerful hurricanes which passed through the region in September of 2017 continues, the region’s share of global arrivals contracted marginally and stood at 2.2% at the end of 2018 compared to 2.3% in 2017.”

The Turks and Caicos Islands 2018 figures indicates that the destination welcomed and hosted some 1.4M tourists to its shores. Whereas cruise arrivals accounted for the majority of the visitor population, and showed an increase of 23% which is the highest number of cruise passengers ever; with ships carrying an average capacity of 95%. Land-based arrivals has seen a growth of 6% this year. Despite natural disasters Irma and Maria in 2017 The Turks and Caicos Islands has proven itself to be a resilient destination in which tourism continues to thrive.

The American market maintained its dominant share of total arrivals, as throughout the entire region during this year accounting for 82% of the destination’s land based arrivals. Increases in the Canadian and European Markets were also achieved this year but more notable the Turks and Caicos Islands received more arrivals from South America. The South American market provided 1.7 million tourist arrivals or 5.8% of the total traffic in the region in 2018. This represented a 2.2% increase in arrivals and was the result of the excellent performances in Argentina and Brazil.

CTO reported that, The Caribbean destinations received a total of 59.5 million visitor arrivals, comprising 30.2 million tourist arrivals and 29.3 million cruise passenger visits. This represented the ninth consecutive year of increased spending by visitors to the region.

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

2018

Comparing 2017 and 2018

1,463,085

**TOTAL VISITOR
ARRIVALS**



Land Based Arrivals from
Major Markets

United States	6%	↑
Canada	4%	↑
Europe	47%	↑



23%

Cruise Arrivals



6%

Land Based Arrivals

Visitor Spending

Based on
DEPARTING VISITORS SURVEY



13%

Air Load Factor

2.9M DURING ONE
WEEK PERIOD SEPT. 2018



Historical Arrival Totals

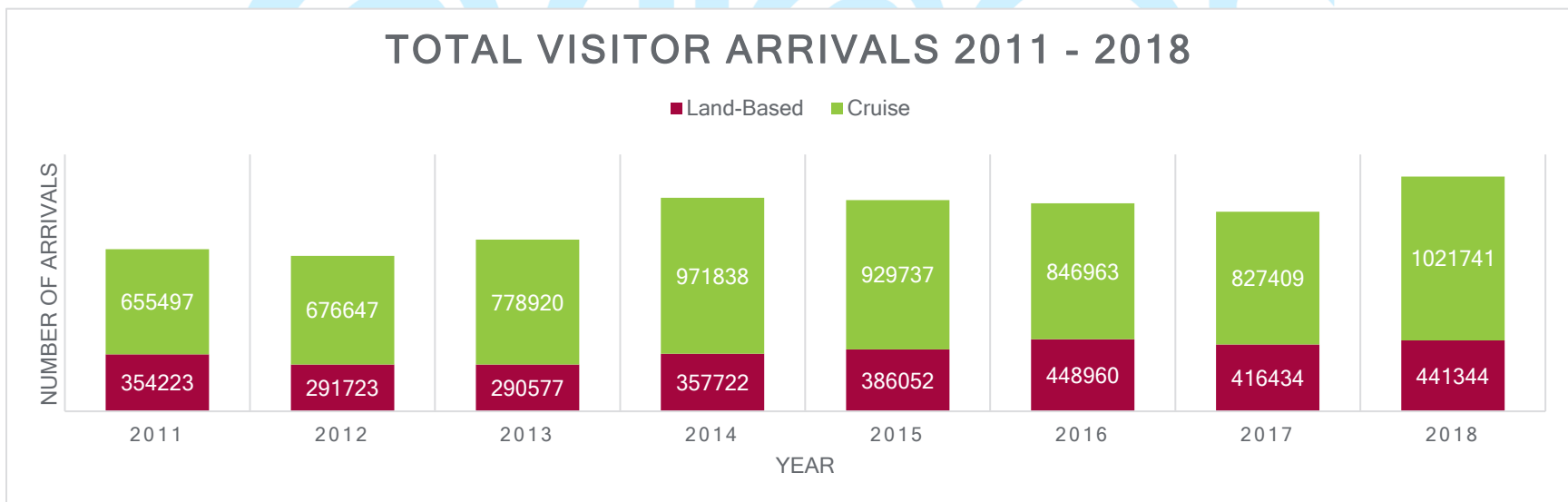


CHART 1, 2

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

Visitors by Month 2018

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Land Based Arrivals	31737	41160	50128	43632	38090	42012	45206	34622	15768	21854	33736	43399
Cruise Arrivals	78990	90937	83294	66095	84046	78954	84078	99562	70075	79400	97002	109308
Total	110727	132097	133422	109727	122136	120966	129284	134184	85843	101254	130738	152707

CHART 3

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

2018 has been a monumental year for the Turks and Caicos Islands, as Total Visitor Arrivals has seen an impressive 18% increase. Cruise arrivals account for the majority of the destination's visitor population. The Turks and Caicos Islands Tourist Board seeks to convert cruise arrivals to stayovers therefore creating a better balance.

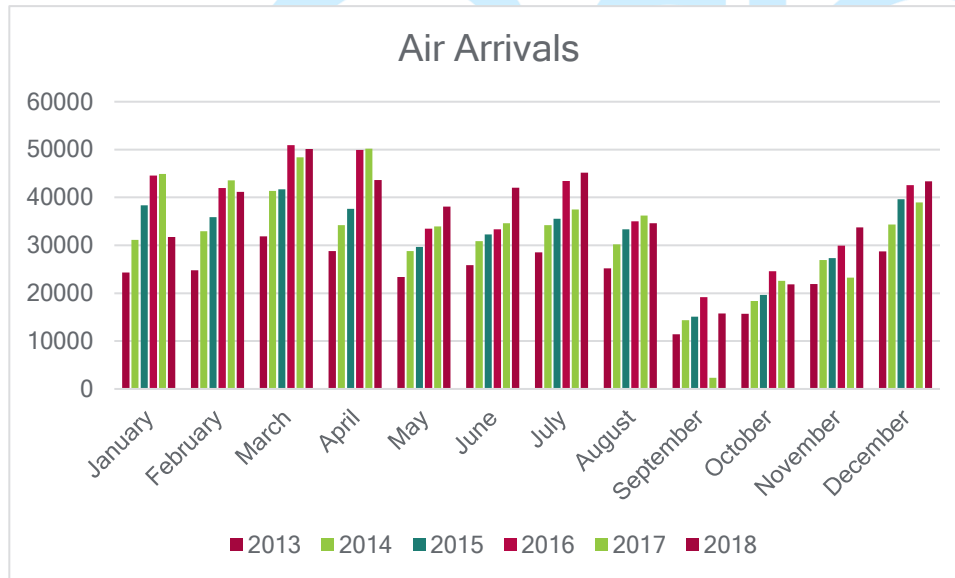


CHART 4

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

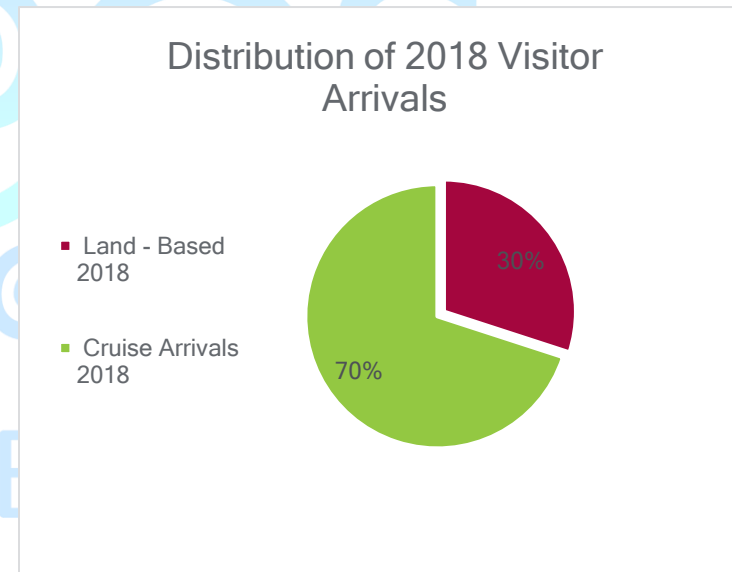


CHART 5

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

Land Based Arrivals by Country of Origin



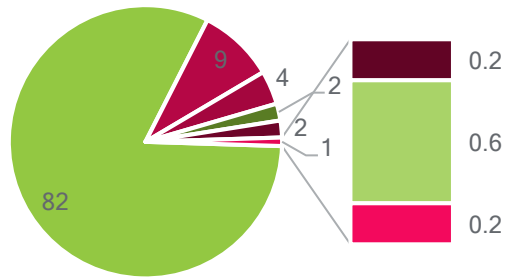
2018 Arrivals by Month

	United States	Canada	Europe	Caribbean	South America	Asia	Rest of the World	Not Stated	Total
January	25251	3391	897	1431	180	0	587	0	31737
February	34319	4005	946	1240	273	0	377	0	41160
March	42241	5067	1225	1317	52	0	226	0	50128
April	36283	3898	1876	463	849	79	133	51	43632
May	31652	2420	1555	1087	892	169	171	144	38090
June	36811	1792	1203	1048	690	168	172	128	42012
July	38392	2030	2284	691	1426	128	195	60	45206
August	27573	1821	3360	797	599	192	152	128	34622
September	12760	1365	513	399	568	54	104	5	15768
October	16841	1978	1222	911	595	85	99	123	21854
November	26728	4435	1279	527	483	88	164	32	33736
December	34621	5506	1887	484	573	102	178	48	43399
Total	363472	37708	18247	10395	7180	1065	2558	719	441344

CHART 6 Source: Air Stats: Immigration E/D Cards

Air Visitor Country of Origin 2018

- United States
- Canada
- Europe
- Caribbean
- South America
- Asia
- Rest of the World
- Not Stated



Air visitors from the United States grew by 6% year-over-year and accounted for 82% of the total. Canadian visitors increased in 2018 and now account for 9% and the UK accounts for 4% of the total respectively.

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

Land Based Arrivals by Country of Origin 2018 vs 2017

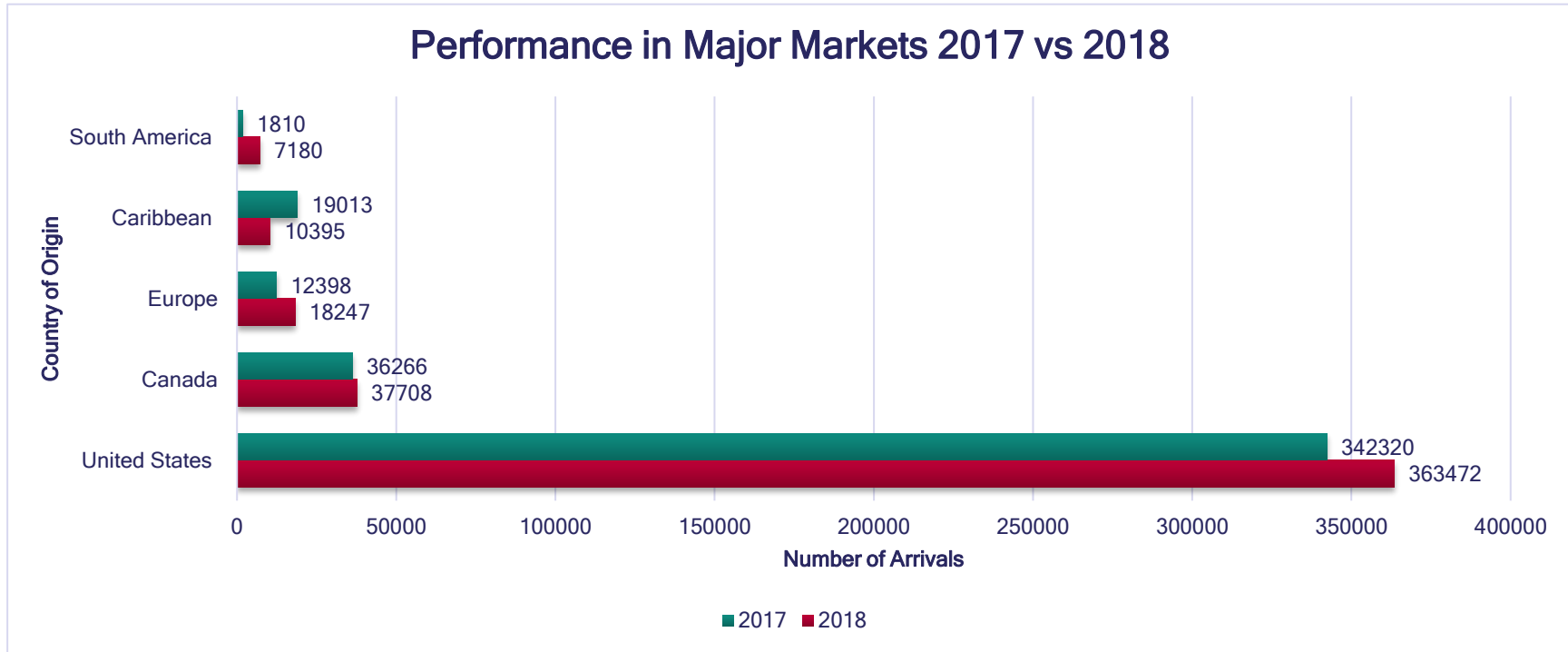
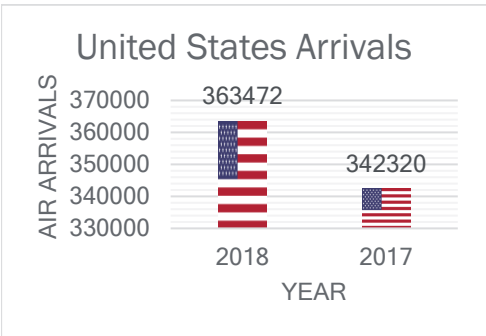


CHART 8 Source: Air Stats: Immigration E/D Cards

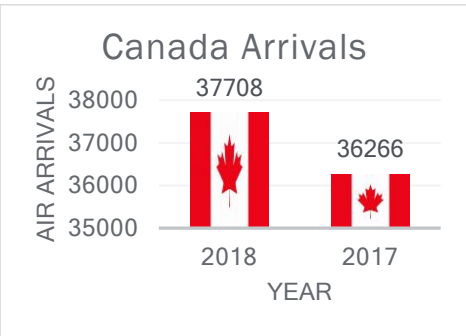
The top markets for visitors to the Turks and Caicos Islands are the United States, Canada, United Kingdom, Italy, France, Germany, other European Countries, Brazil, the Caribbean and all other countries to follow.

Land Based Arrivals 2018 Major Markets



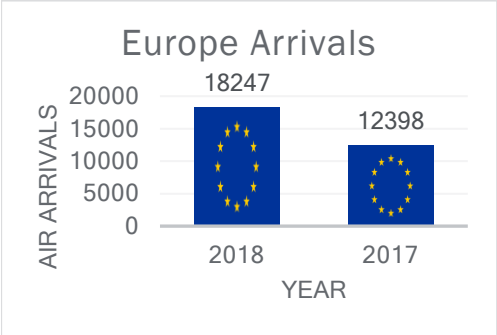
United States Arrivals
 Arrivals from the leading source market to the destination totaled 363,472 visitors. When compared to 2017, visitor arrivals from the USA showed a 6% increase.

CHART 9 Source: Air Stats: Immigration E/D Cards



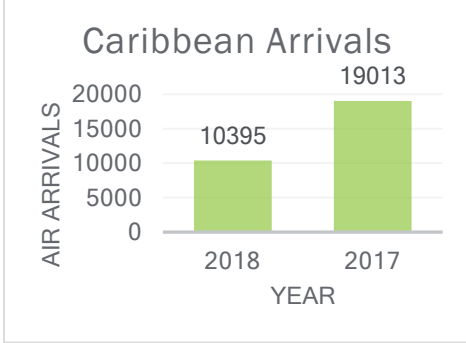
Canada Arrivals
 Arrivals from Canada saw an overall increase of 4%

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



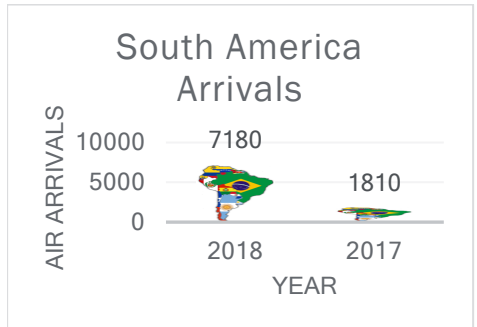
Europe Arrivals
 Arrivals from the European market for destination TCI saw a 47% increase. With the highest share coming out of the UK, France and Italy respectively.

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



Caribbean Arrivals
 Arrivals from the Caribbean decreased by 45%

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



South America Arrivals
 Arrivals from the South American Market predominately Brazil, Argentina indicated an increase of 297% in arrivals.

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

Cruise Visitor Statistics



NUMBER OF CRUISE SHIPS AND PASSENGERS FOR 2018

	2018	Total Passengers
January	27	78,990
February	31	90,937
March	28	83,294
QTR 1 TOTAL	86	253,221
April	23	66,095
May	25	84,046
June	21	78,954
QTR 2 TOTAL	69	229,095
July	22	84,078
August	26	99,562
September	21	70,075
QTR 3 TOTAL	69	253,715
October	25	79,400
November	34	97,002
December	37	109,308
QTR 4 TOTAL	96	285,710
GRAND TOTAL	320	1,021,741

CHART 14 Source: Cruise Stats: Grand Turk Cruise Center

Number of Cruise Ships For 2018

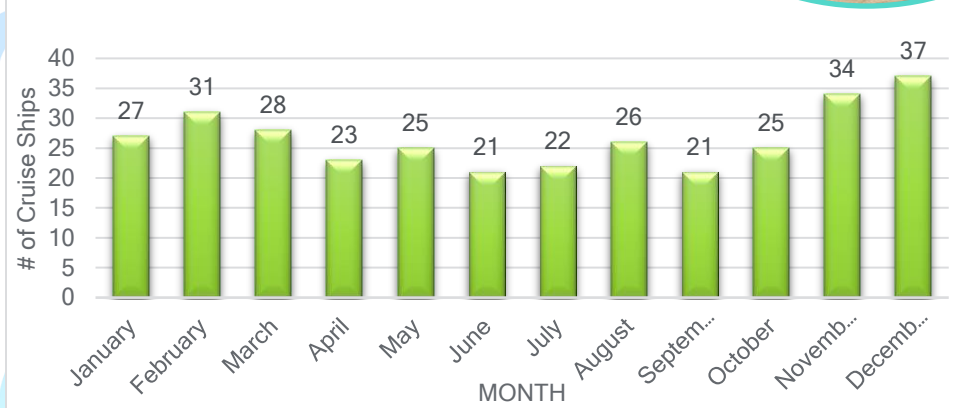


CHART 15 Source: Cruise Stats: Grand Turk Cruise Center

Number of Cruise Ships Passengers For 2018

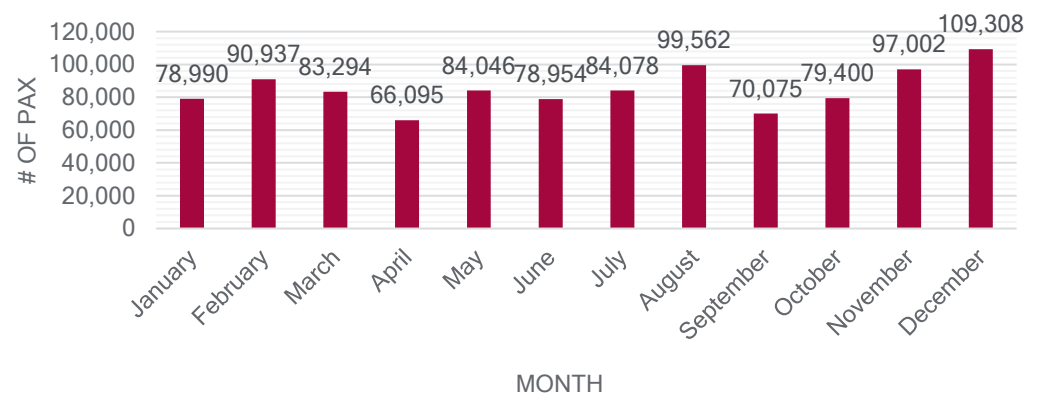


CHART 16 Source: Cruise Stats: Grand Turk Cruise

Most Cruise Arrivals Ever

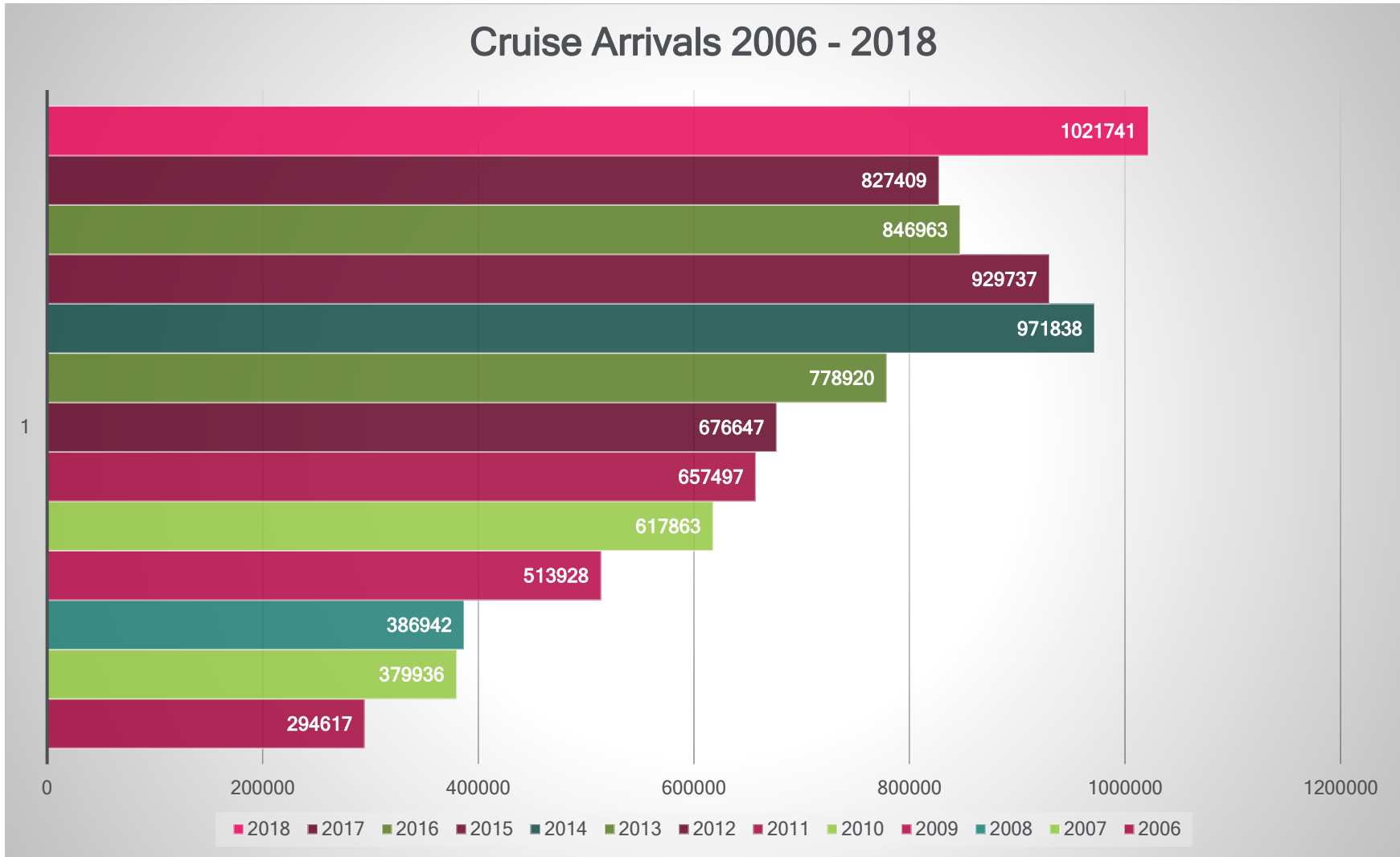


CHART 17 Source: Cruise Stats: Grand Turk Cruise

Cruise Visitors by Nationality

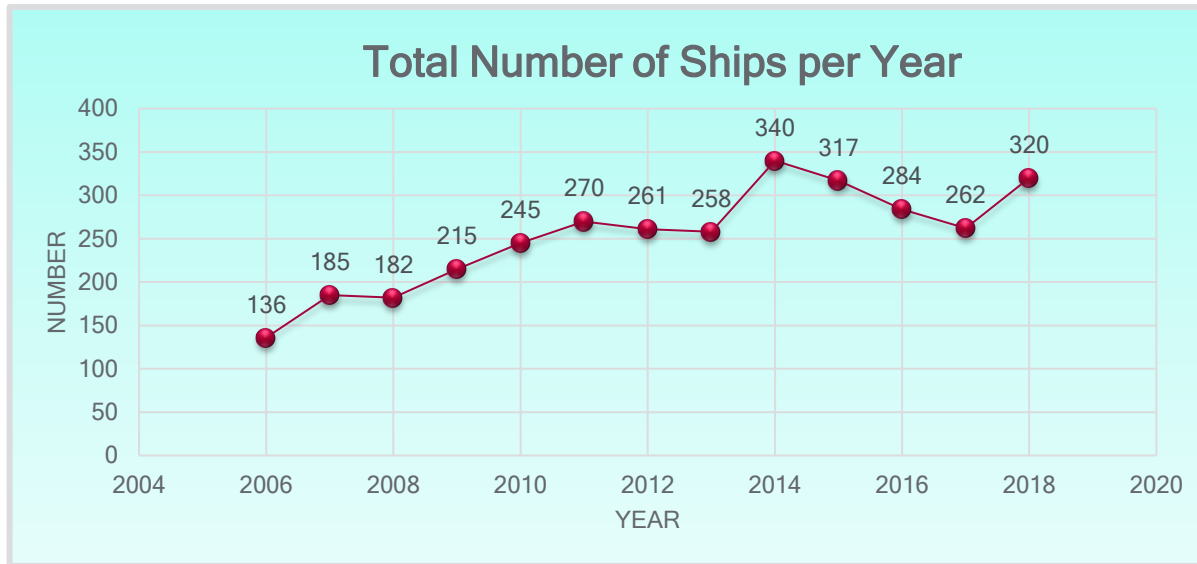


CHART 18 Source: Cruise Stats: Grand Turk Cruise Center

CRUISE SHIP CAPACITY

BY MONTH

January	91%
February	89%
March	95%
April	95%
May	96%
June	103%
July	103%
August	103%
September	91%
October	92%
November	90%
December	93%

Source: Cruise Stats: Grand Turk Cruise Center

NUMBER OF PASSENGERS BY NATIONALITY FOR 2018

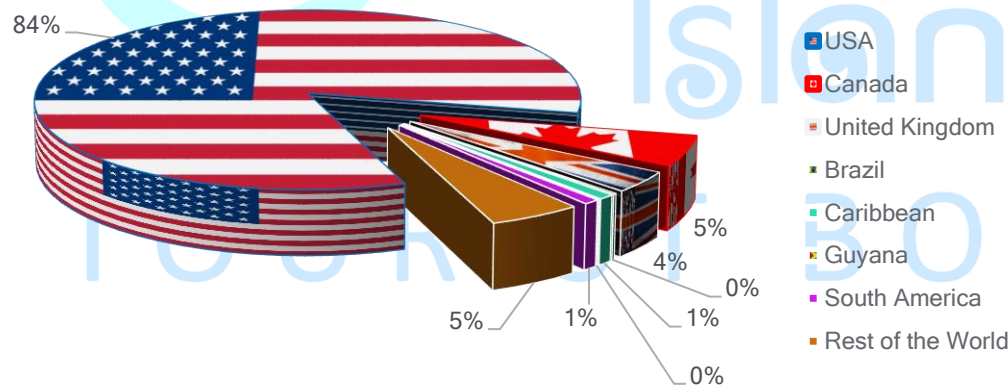


CHART 19 Source: Cruise Stats: Grand Turk Cruise Center

Air Statistics



Overall Sold Seats	2017	2018	# CHG YOY	% CHG YOY
January	42953	42451	-502	-1
February	42688	44706	2018	5
March	52297	54266	1969	4
Q1	137938	141423	3485	2
April	51619	46136	-5483	-12
May	38312	42181	3869	9
June	40453	45250	4797	11
Q2	130384	133567	3183	2
July	45602	44873	-729	-2
August	40118	40566	448	1
September	10250	21736	11486	53
Q3	95970	107175	11205	10
October	13405	26884	13479	50
November	21569	36738	15169	41
December	39701	49592	9891	20
Q4	74675	113214	38539	34

“When compared to 2017’s figures, Air Load Factor has increased in 2018 by 13%.”

CHART 20
Source: Turks and Caicos Islands Airport Authority

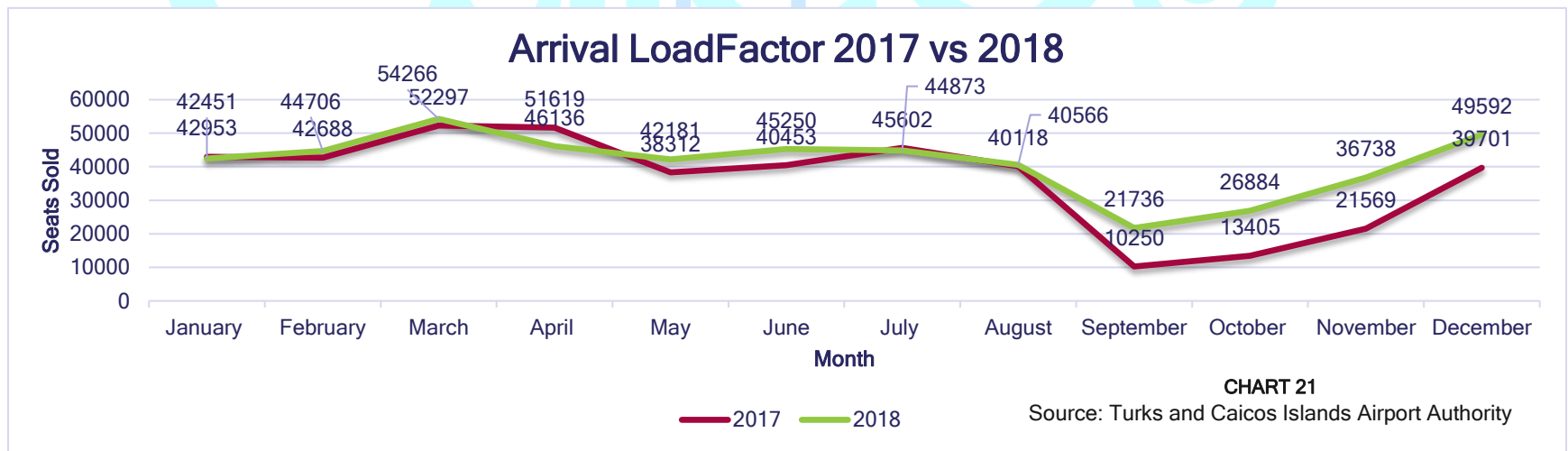


CHART 21
Source: Turks and Caicos Islands Airport Authority

Air Statistics

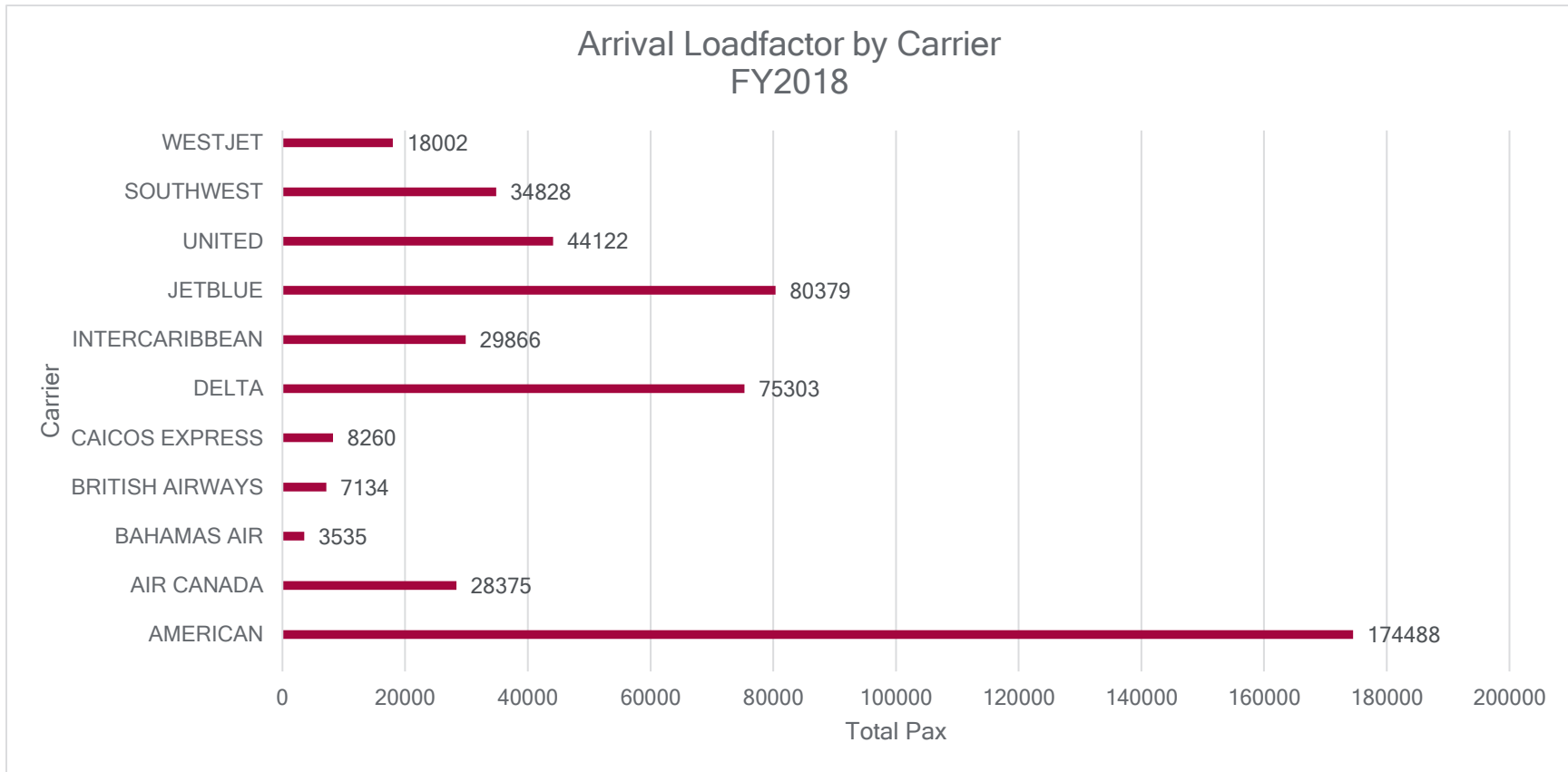


CHART 22

Source: Turks and Caicos Islands Airport Authority

TOURIST BOARD



Accommodation Statistics



Properties By Island - 2018

	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 23
Source: Turks and Caicos Islands Tourist Board

Registered Properties Room Count 2018

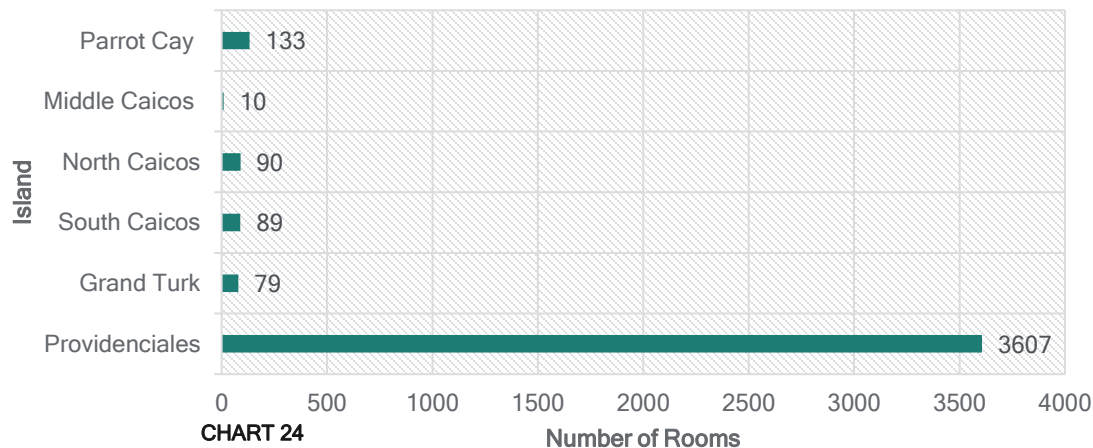


CHART 24
Source: Turks and Caicos Islands Tourist Board

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

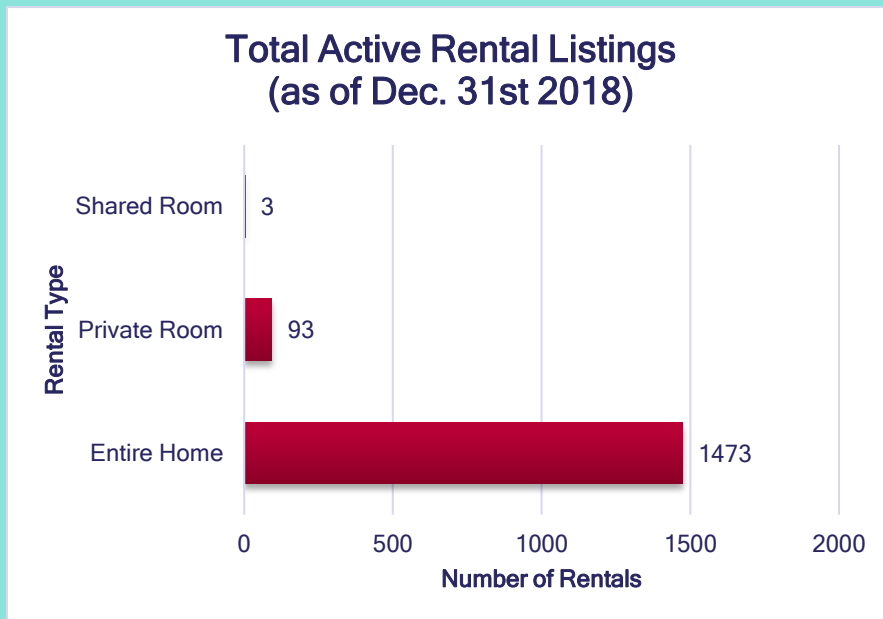


CHART 25 Source: AirDNA

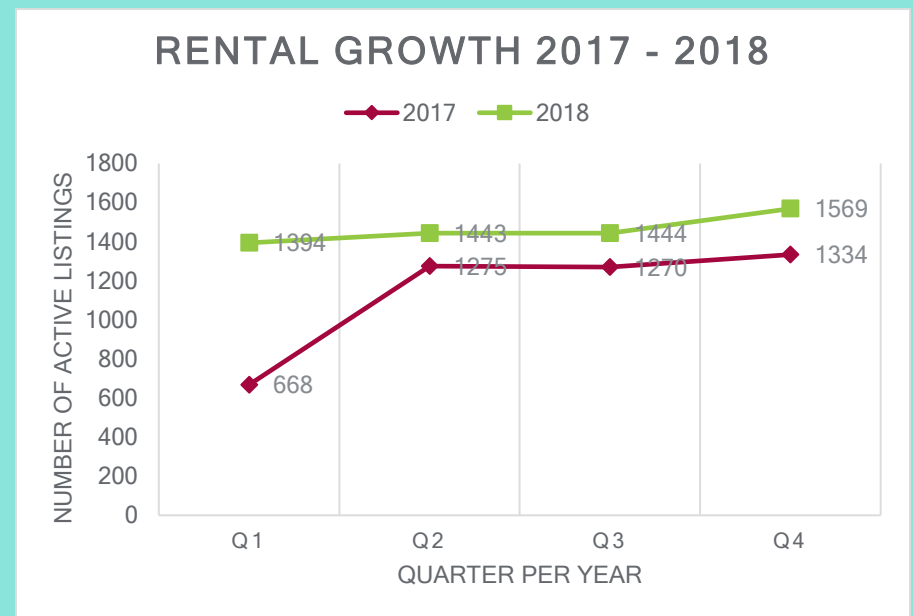


CHART 26 Source: AirDNA

As of December 31st 2018, 1569 Active Rentals throughout the Turks and Caicos Islands has been listed on the Airbnb and HomeAway Rental Channels. These listings increased by 18% when compared with 2017 and are composed of entire homes, private rooms and shared room rental types.

Estimated Total Visitor Spending

September 2018, the Turks and Caicos Islands Government Department of Economic Planning and Statistics conducted a Departing Visitors Survey. Below are the recorded highlights:

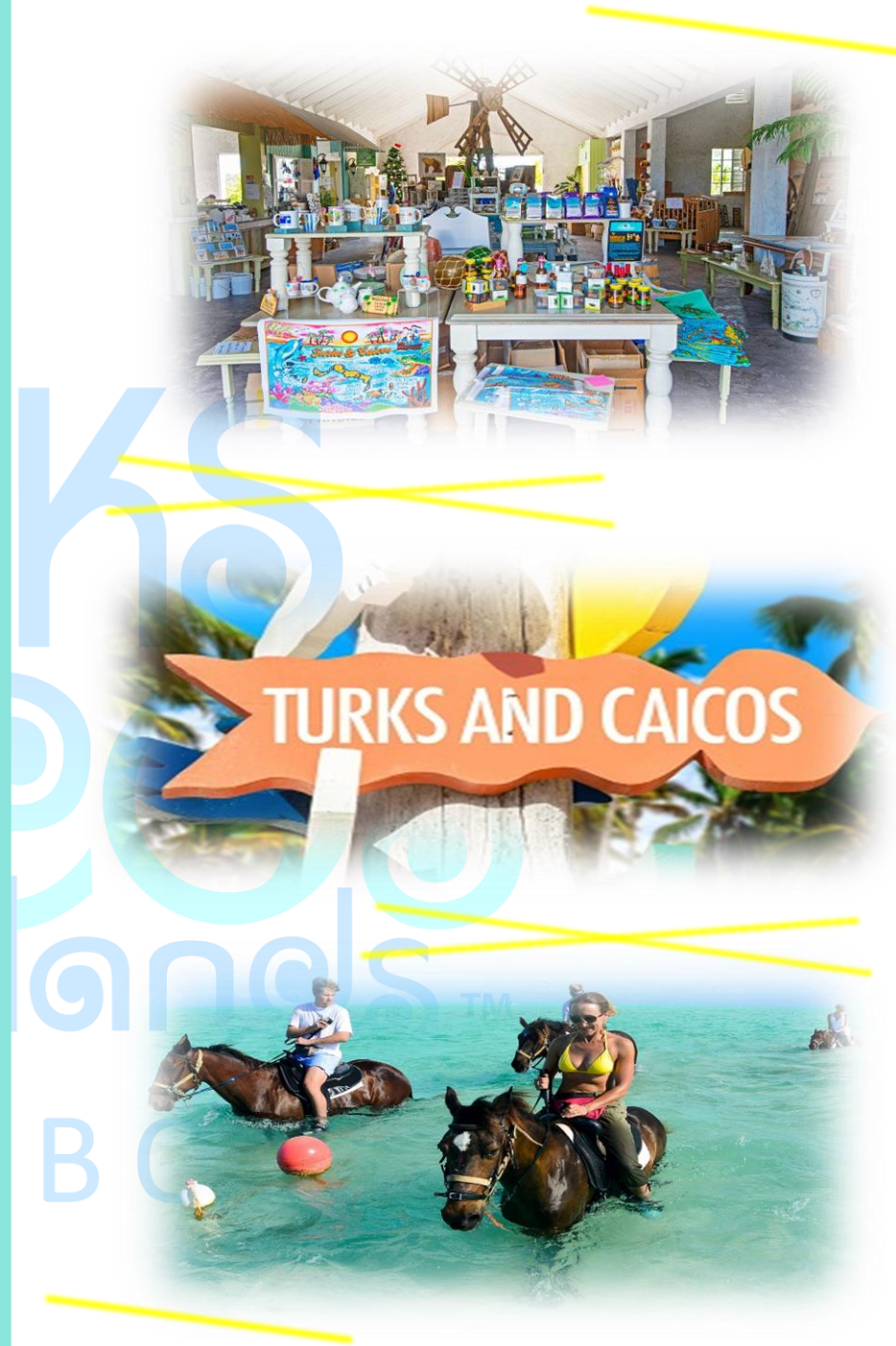
“Approximately \$2.9 million were spent by visitors during the one-week period in September 2018. This accounted for \$1.05 million in packaged expenditures and \$1.89 million in non-packaged expenses. Among the non-packaged expenditures, accommodations and meals accounted for the largest share of about 79.8%. Shopping expenses 1.76 percent. The amount spent on shopping could have been much higher if only more shops were available to the visitors. As was the case with previous departing visitors’ surveys, many of the visitors recommended that more shops be made available for tourists.”

Translated into daily figures, each visitor had spent an average daily expenditure of \$256.56. This was about \$236.62 for packaged expenses and \$269.07 for non-packaged expenses.

By categories:

- Among the group with the largest number of Visitors, the Europeans were the big spenders at \$346.46 average daily expenses per person of which \$418.50 were spent on non-packaged items.
- First time visitors to the Islands spent a daily average of \$223.13 per person. On the other hand, previous visitors spent around \$243.69 daily.

SOURCE: DEPARTMENT OF STATISTICS (TCIG)



Estimated Total Visitor Spending (cont.)

Category of Expenditure	Average Daily Expenditures per Person (US\$)					
	Total	USA	Canada	Europe	Caribbean	Rest of the World
Total	256.56	258.36	270.84	346.46	158.28	245.62
Packaged Expenditures	236.62	134.74	262.06	222.44	274.02	151.34
Non-Packaged Expenditures	269.07	269.43	299.85	418.50	139.91	461.12
Accommodation	173.72	172.89	188.44	287.32	86.97	354.47
Meals	40.88	40.97	58.85	58.39	25.59	45.20
Taxi/ Car Rental	11.15	11.24	15.38	17.05	5.80	12.24
Tours/ Excursions	22.18	22.61	14.91	30.89	11.94	29.00
Entertainment/ Recreation	12.55	12.56	13.24	22.75	7.16	17.40
Shopping	4.73	5.02	4.67	0.00	1.99	1.71
All Other Spending	3.87	4.14	4.36	2.10	0.45	1.11

CHART 27: EXPENDITURES OF RESPONDING VISITORS BY CATEGORY OF EXPENDITURES: SEPT. 2018.
SOURCE: DEPARTMENT OF STATISTICS (TCIG)

Category of Expenditure	Total Expenditures		Average Daily Expenditures (US\$)
	Amount (US\$)	% of Total	
Total	2,939,456.58	100.00	256.56
Packaged Expenditures	1,045,019.07	35.55	236.62
Non-Packaged Expenditures	1,894,437.51	64.45	269.07
Accommodation	1,223,090.44	64.56	173.72
Meals	287,794.08	15.19	40.88
Taxi/ Car Rental	78,512.99	4.14	11.15
Tours/ Excursions	156,153.00	8.24	22.18
Entertainment/Recreation	88,345.00	4.66	12.55
Shopping	33,269.00	1.76	4.73
All Other Spending	27,273.00	1.44	3.87

CHART 28: EXPENDITURES OF RESPONDING VISITORS BY CATEGORY OF EXPENDITURES: SEPT. 2018.
SOURCE: DEPARTMENT OF STATISTICS (TCIG)

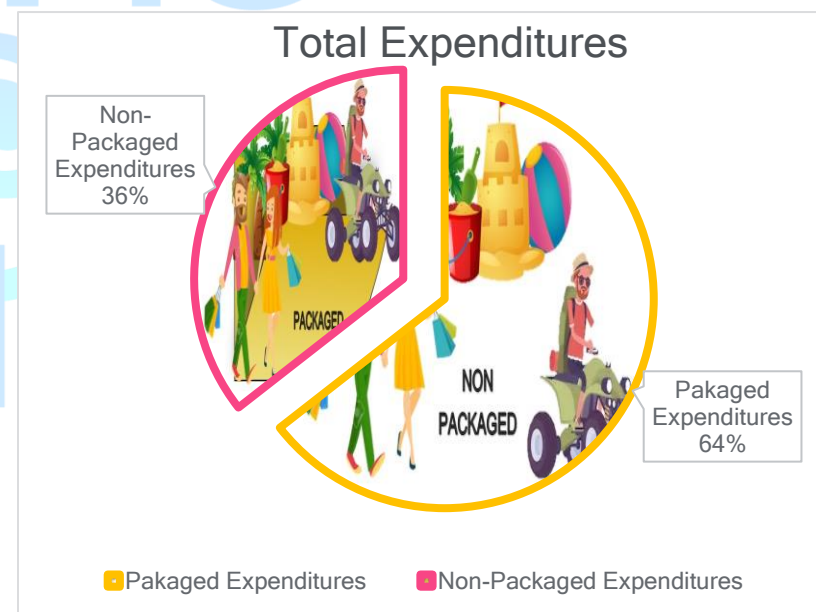
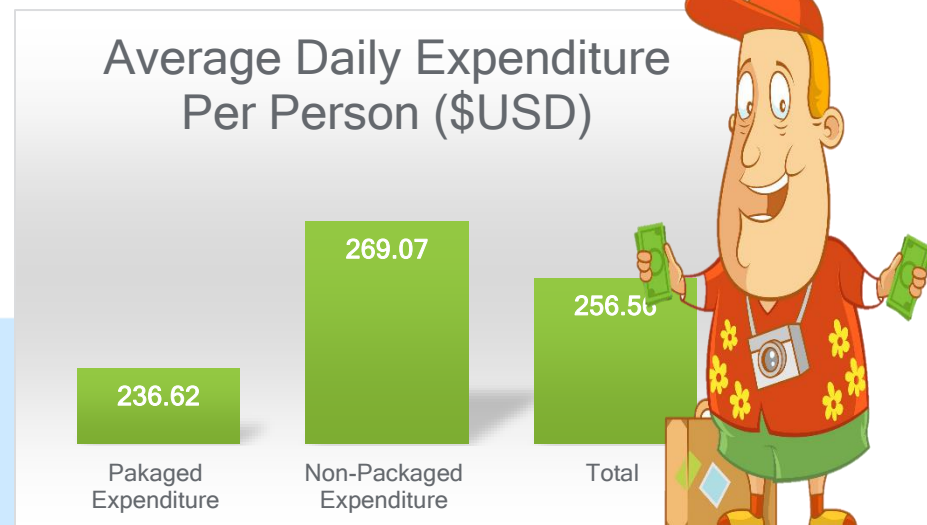
1. The largest group of visitors was from the United States of America. They accounted for 84.4% of responding visitors and 86.5% of total visitors.
2. The Islands was a choice place of tourists traveling with family. About 22.4% visited with children/family and another 45.9% with their spouses/partner.
3. There were about 49.5% first time visitors to the TCI and only 25.1% were first time visitors to the Caribbean region.
4. Providenciales was the most frequented island with the majority of the visitors spending their visit on this commercial center. The top most visited place was the Beaches Resort.
5. The Islands was a favorite place for persons travelling on vacation/pleasure (85.9%).
6. Endorsement from the airlines (32.2%) was posted as the top source of information in planning the TCI trip. Next major source was online travel agencies such as Expedia (17.6%).
7. The majority of the responding visitors (61.26) did not travel on a pre-paid package.
8. The average length of stay in the TCI was about 6 nights and around \$256.56 was the average daily expenditure per person.
9. About \$2.94 million were spent by responding visitors on this particular visit. This accounted for \$ 1.05 million in packaged expenditures and \$1.89 million in non-packaged expenses.
10. 51.3% of the responding visitors booked their airfare directly with an airline, 21.7% booked online through the internet booking service and 14.1% booked through a travel agency.

SOURCE: DEPARTMENT OF STATISTICS (TCIG)

Estimated Total Visitor Spending (cont.)

- About 29.2% of the responding visitors booked their lodging arrangements directly through the airline. 28.5% booked through the internet booking service and 16.8% booked through a travel agency.
- The factors considered with utmost importance in deciding visits were the beautiful beaches (74.6%), ease of travel access (3.5%) and affordability (1.8%).
- The majority of visitors (55.7%) took between 2 to 6 months to decide on their visit to the TCI.
- Visitors generally felt that the tourism services and product in the TCI was very good. However, some expressed dissatisfaction with the level of souvenir purchases and the services of taxi/ hired cars and the lack of night life in the Turks and Caicos Islands.
- There was a positive willingness among visitors to return to the Islands and to recommend visit to TCI.
- Most visitors (98.8%) felt safe in the TCI.
- About 53.1% of the responding visitors stated that the wait time for the baggage claim was short while 31.2% claimed that it was reasonable.
- 61.7% of the responding visitors stated that the wait time for customs was short and 51% indicated that it took about 0-9 minutes.

SOURCE: DEPARTMENT OF STATISTICS (TCIG)



CHARTS 29, 30: EXPENDITURES OF RESPONDING VISITORS: SEPTEMBER 2018

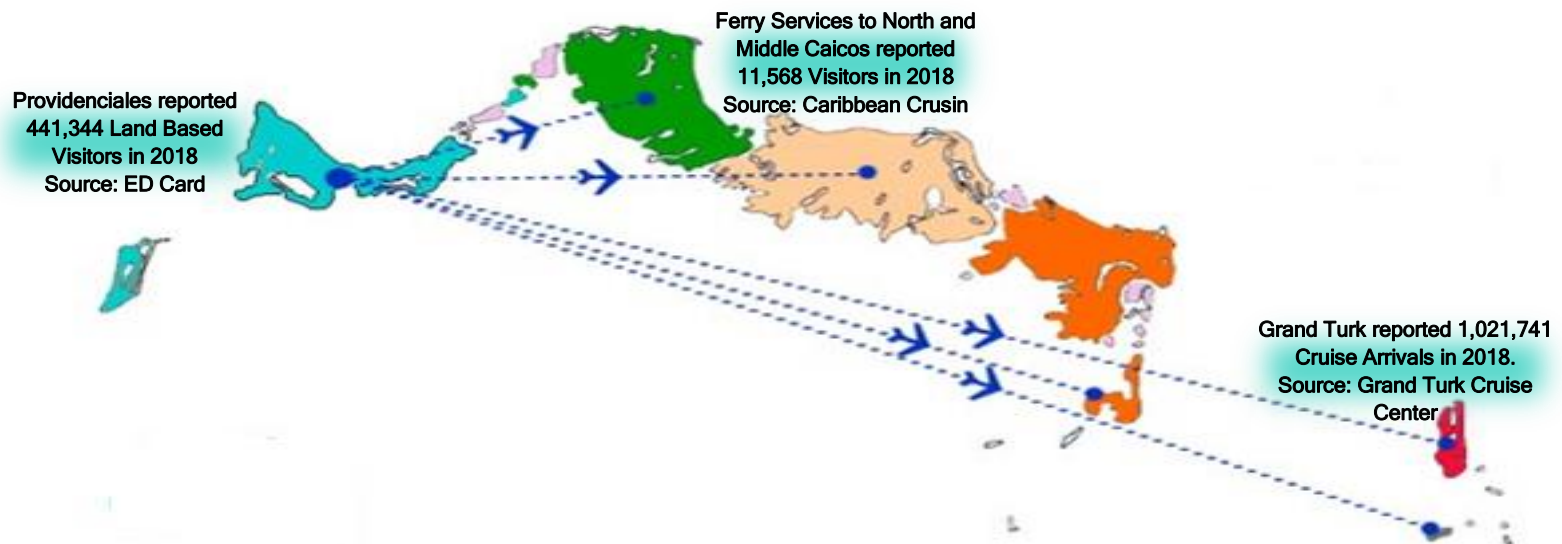
SOURCE: DEPARTMENT OF STATISTICS (TCIG)

Focus and Nurture of Sister Islands

Various research has brought to light lack of awareness that the Turks and Caicos Islands is a chain of islands not just Providenciales, which has become the Tourism Hub of the Turks & Caicos. The need to bring awareness to the other islands within the Turks & Caicos Islands gave birth to the idea of a coined phrase that would enhance the brand's image of the other islands, thus the term "Sister Islands" was conceived.

In efforts to now promote the "Sister Islands" a number of advertising strategies were utilized such as forming partnerships with various wholesale and media associates to publish articles on the benefits of visiting the Sister Islands. Social Media was utilized by promoting the Sister Islands on a weekly basis and highlighting each week a different Sister Island. Furthermore the Sister Islands were promoted through the various tradeshow attended in the US, Canada, Europe and Latin America by the Tourist Board's respective Marketing Reps.

- Jennifer Pardo
Senior Marketing Executive



Outlook 2019



The Turk & Caicos Tourist Board in a continued effort to promote the Turks & Caicos as the number 1 Tourism destination in the Caribbean has embarked on several key initiatives to ensure that the destination's presence in the market is maximized. These initiatives take the form of the Traditional methods such as attendance of Trades Shows in the United States, Canada, Europe and Latin America. With the addition of print magazine advertisements throughout these markets, that place an emphasis on promoting the Sisters Islands and niches such as Weddings & Honeymoons, Eco Tourism and Culinary Tourism.

To remain competitive the Board has also modernized various forms of advertising by incorporating non-traditional mass media marketing strategies. These are inclusive of Digital Billboard Advertisements in Times Square in the US and Dundas Square in Canada. As well as television features on the Wheel of Fortune and filming several episodes of the critically acclaimed the Bay TV series within the Turks & Caicos.

The Turks and Caicos Islands recently saw the commencement of several new properties and flight additions in 2018, which will make way for visitor arrival increases and the room inventory of the destination.

The Tourist Board's commitment to working with wholesalers & hotel partners has not wavered. The Tourist Board collaborated with various wholesalers to promote not just the Tourism Hub of Providenciales but all the Sisters Islands. Likewise there has been a myriad of partnerships with various hotels partners such as absorbing the majority of the costs associated with collaborations with conglomerates such as Expedia and partnering for various press trips and trades shows to minimize costs and maximize the output.

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 2019
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.

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.

