

TOURISM STATISTICS 2015 – TURKS AND CAICOS ISLANDS

as of December 31, 2015

The Turks and Caicos Islands welcomed and hosted some 1,315,268 million tourists to its shores in 2015. Backed by an 8.1 percent increase in stay-over arrivals, the destination continues to reach new heights with noted growth in stay-over arrivals recorded for each month of the year, and within the majority of its major source markets. Further assessment of the 1.3 million visitors in 2015 shows 385,531 visitors were stop-over guest arriving primarily at the Providenciales International Airport (PLS) and 929,737 visitors came via cruise.

Stop-Over Arrivals

Moving towards the inclusion of arrivals at the destination fixed based operations (FBOs) to the overall stop-over arrivals, the Turks and Caicos Islands recorded 8,206 tourist arrivals via private aircraft in 2015. An outstanding 3,253 tourists arrived to the destination via private aircraft in the first quarter alone. Stop-over arrivals via private aircraft however were excluded from the overall statistical information for both years as the recordings lacked demographical details.

*Once the demographical details are received, this data will be added to the overall stop-over arrivals for 2015 and used in comparisons for 2016.

Turks and Caicos Arrivals at Fixed Based Operators Quarterly Basis

Month	2015
January	1,115
February	842
March	1,296
1st Quarter	3,253
April	839
May	478
June	556
2nd Quarter	1,873
July	672
August	372
September	241
3rd Quarter	1,285
October	404

Turks and Caicos Islands Tourism Statistics 2015

November	722
December	669
4th Quarter	1,795
YTD	8,206

Source: Turks and Caicos Islands Airports Authority Revenue and Statistical Unit

The Turks and Caicos Islands saw an increase in stop-over arrivals for each month of the year ranging from a growth rate of 23.2 percent in January to 0.7 percent in March of 2015. The first and fourth quarters of 2015 posted the greatest growth in stop-over arrivals for the Turks and Caicos Islands – with increases of 9.9 percent and 9.7 percent respectively when compared to the same periods in 2014. The first quarter accounted for 115,979 stop-over arrivals. Of significance, the month of January experienced growth of 23.3 percent, the most of any month, whilst the month of March welcomed 41,690 stop-over arrivals, the most arrivals of any month in 2015.

Turks and Caicos Stop-over Arrivals 2015 Quarterly Basis

Month	2015	2014	% Change
January	38,377	31,155	23.2
February	35,912	32,962	8.9
March	41,690	41,389	0.7
1st Quarter	115,979	105,506	9.9
April	37,633	34,212	10.0
May	29,650	28,779	3.0
June	32,258	30,850	4.6
2nd Quarter	99,541	93,841	6.1
July	35,525	34,116	4.1
August	33,358	30,175	10.5
September	15,078	14,673	2.8
3rd Quarter	83,961	78,964	6.3
October	19,625	18,385	6.7
November	27,319	26,904	1.5
December	39,627	33,637	17.8
4th Quarter	86,571	78,926	9.7
YTD	386,052	357,237	8.1

Source: Turks and Caicos Tourist Board Statistics Office

Regional Destinations Performance

According to a recent report from the Caribbean Tourism Organization (CTO), released in December 2015, a total of 27 Caribbean countries recorded tourist arrivals in 2015. A snapshot of CTO's figures showed destinations in the region recorded stop-over arrivals as stated below:

- Antigua and Barbuda down 2.4% (through September)
- Aruba up 14.9% (through September)
- Bahamas up 2.6% (through September)
- Barbados up 14.9% (through September)
- Belize up 4.4% (through November)
- Bermuda down 1.4% (through October)
- Cayman Islands up 1.0% (through October)
- Cuba up 17.8% (through September)
- Dominican Republic up 8.9% (through November)
- Grenada up 7.0% (through August)
- Jamaica up 2.1% (through October)
- Puerto Rico up 4.0% (through April)
- Saint Lucia up 3.3% (through October)
- U.S. Virgin Islands up 6.5% (through October)

Turks and Caicos Stop-Over Arrivals by Major Markets

	2015	% Share	2014	% Share	% Change
USA	315,247	81.7	289,676	81.1	8.8
Canada	36,512	9.5	37,989	10.6	-3.9
Europe	11,403	3.0	8,202	2.3	39.0
Other	22,890	5.9	21,370	6.0	7.1
TOTAL	386,052	100.0	357,237	100.0	8.1

Source: Turks and Caicos Tourist Board Statistics Office

The United States remained the leading source market representing 81.7% 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 2015. Stop-over arrivals from the United States in 2015 grew by 8.8 percent in comparison to 2014. The total number of stop-over arrivals from the United States in 2015 was 315,247.

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 2015 compared to 2014:

- Antigua and Barbuda down 3.3% (through September)
- Aruba up 8.7% (through September)
- Bahamas up 1.2% (through September)
- Barbados down 28.2% (through September)
- Bermuda down 0.9% (through October)
- Cayman Islands up 1.3% (through October)
- Dominican Republic up 12.1% (through November)
- Jamaica up 3.6% (through October)
- Puerto Rico up 4.3% (through April)
- Saint Lucia up 7.9% (through October)

Turks and Caicos Stop-Over Arrivals by Target Markets

	2015	% Share	2014	% Share	% Change
USA	315,247	81.7	289,676	81.1	8.8
Canada	36,512	9.5	37,989	10.6	-3.9
United Kingdom	6,399	1.7	4,304	1.2	48.7
Italy	1,472	0.4	1,345	0.4	9.4
France	1,027	0.3	789	0.2	30.2
Germany	386	0.1	307	0.1	25.7
Other EU	2,119	0.5	1,457	0.4	45.4
Brazil	1,546	0.4	1,890	0.5	-18.2
Caribbean	16,889	4.4	15,551	4.4	8.6
Other	4,455	1.2	3,929	1.1	13.4
TOTAL	386,052	100.0	357,237	100.0	8.1

Source: Turks and Caicos Tourist Board Statistics Office

The destination's second largest source market, Canada, saw a decline in both stop-over arrivals and market share in 2015. The Turks and Caicos welcomed a total of 36,512 stop-over arrivals from Canada, down 3.9 percent when compared to the same period in the previous year.

Canada's market share decreased by nearly 2 percent.

The Turks and Caicos recorded the highest overall growth from Europe in the region with a 38.7 percent increase in stop-over arrivals with growth recorded in all European source markets. Stop-over arrivals from the United Kingdom grew 48.7 percent year-over-year. Similarly, stop-over arrivals from France continued its steady growth in 2015, recording an increase of 27.5%.

Interest from other European nations including Ireland, Luxemburg, Spain and Switzerland, etc. collectively showed an increase of 45.4 percent in 2015 when compared to 2014.

Together the European market recorded 11,403 stop-over arrivals to the destination in 2015, up from 8,202 in 2014. A breakdown in stop-over arrivals from the European region reveals 6,399 visitors from the United Kingdom; 1,027 visitors from France; 1,472 visitors from Italy; 386 visitors from Germany and 2,119 visitors from other European nations.

Still new to the Latin American territory, the destination recorded 1,546 stop-over arrivals from Brazil, a decline of 18.2 percent when compared to 2014. Increases in visitors from the Eastern Caribbean have also been a noted trend. 16,889 stop-over arrivals were welcomed from the Caribbean region, an increase of 8.6 percent year-over-year. 4,455 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 13 percent when compared to arrivals of 3,929 in 2014.

Cruise Arrivals

Cruise Arrivals: January - December 2015

	2015		2014		% Change	
	Calls	Passengers	Calls	Passengers	Calls	Passengers
January	37	96,129	40	95,517	-7.5	0.6
February	37	104,928	27	72,862	37.0	44.0
March	30	75,350	35	84,303	-14.3	-10.6
1st Quarter	104	276,407	102	252,682	2.0	9.4
April	18	54,611	25	74,092	-28.0	-26.3
May	16	52,248	24	71,586	-33.3	-27.0
June	24	82,587	24	79,230	0.0	4.2
2nd Quarter	58	189,446	73	224,908	-20.5	-15.8
July	22	78,929	28	97,646	-21.4	-19.2
August	21	71,182	21	73,973	0.0	-3.8
September	18	57,121	21	66,413	-14.3	-14.0
3rd Quarter	61	207,232	70	238,032	-12.9	-12.9
October	25	72,248	23	68,553	8.7	5.4
November	33	91,151	31	81,094	6.5	12.4
December	36	93,253	41	106,569	-12.2	-12.5
4th Quarter	94	256,652	95	256,216	-1.1	0.2
YTD	317	929,737	340	971,838	-6.8	-4.3

Source: Turks and Caicos Tourist Board Statistics Office

While the Turks and Caicos boosted its stop-over arrivals in 2015, cruise arrivals took a downturn. The Grand Turk Cruise Center greeted a total of 929,737 cruise passengers in 2015. While the total nears the 1 million visitor goal via cruise only, the number represents a decline in cruise passengers by 4.3 percent year-over-year. Similarly, the Cruise Center also welcomed fewer ships in 2015, hosting 317 compared to 340 ship calls in 2014; this marked a 6.8 percent decline in ship calls year-over-year.

The first quarter of 2015 showed the only significant sign of growth in cruise passengers and ship calls to the Grand Turk Cruise Center, recording an increase in 9.4 percent and 2.0 percent

respectively. The month of February saw a total of 104,928 cruise passenger arrivals in 2015, the most arrivals in any given month of the year; an increase of 44.0 percent when compared to 2014. Cruise passenger arrivals and ship calls dwindled thereafter. The second quarter of 2015 was most underwhelming for the destination's cruise center. The port accommodated 189,446 cruise passengers in the second quarter, a decrease of 15.8 percent when compared to the same period in 2014. The second quarter also saw the least ship calls; a total of 58 ships anchored at the port between the months of April to June, a 20.5 percent reduction year-over-year.

The third quarter saw a similar trend. A decline in both cruise passenger arrivals and ship calls when compared to the same period in the previous year. While the fourth quarter saw a mere 0.2 percent growth in cruise passenger arrivals, ship calls were down by 1.1 percent year-over-year.

There is no secret that there have been grave challenges to the cruise industry in Grand Turk. The ports underperformance is an indication that an agreeable solution to a list of unresolved matters between Carnival Cruise Lines, operators of the Grand Turk Cruise Center, and the Turks and Caicos Government must be reached in a timely manner in order for Grand Turk to rebound.

CTO's latest statistical report on cruise passenger arrivals by destinations in the region, indicate that cruise passenger arrivals increased in half of the destinations. The data shows:

- Antigua and Barbuda up 22.5% (through October)
- Aruba down 17.5% (through September)
- Bahamas down 4.4% (through August)
- Barbados up 1.8% (through October)
- Belize down 1.5% (through November)
- Bermuda up 8.0% (through October)
- Cayman Islands up 1.9% (through October)
- Curacao down 14.2% (through October)
- Dominican Republic down 6.2% (through October)
- Jamaica up 10.4% (through September)
- Puerto Rico up 13.6% (through September)
- Saint Lucia up 9.1% (through October)
- St. Maarten down 3.4% (through October)

Overview of 2015

The Turks and Caicos Islands continues to see positive growth in stop-over arrivals year-over-year. 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, most notably its accessibility to major gateways in the United States and an increase in airlift. 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 2015. We have reliable and convenient airlift from most of the major gateways in North America, and we’ve also included direct airlift from Chicago O’Hare International Airport, Houston’s George Bush Intercontinental Airport, and airlift from Fort Lauderdale-Hollywood 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 wholesalers in Latin America and gained positive media exposure within the year– all contributing factors to our increases.”

The Turks and Caicos Hotel and Tourism Association (TCHTA) also confirm that unaudited occupancy figures amongst its members are consistent with the Tourist Board’s figures. Stacy Cox, Executive Director of TCHTA stated that these are very encouraging numbers and pledged her Association’s continued support to the Turks and Caicos Government and the Tourist Board in the efforts to grow tourism in the Turks and Caicos Islands.

Moving forward, the Turks and Caicos Tourist Board and its partners will 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. The Board has renewed its commitment to working with wholesalers, hotel partners, airlines and cruise to sell the destination. In addition, the Turks and Caicos Islands is working to expand its hotel and tourism

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.