

D16



National tourism strategy and implementation plan for Turks & Caicos

March 2023

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Introduction

This report represents “D16 – National Tourism Development Strategy and Implementation Plan” for Turks and Caicos Islands as requested by the TOR.

The new tourism strategy considers that the tourism industry is an essential part of TCI’s economic growth and is bringing important revenues, job opportunities and a better quality of life for the local population. In the last 20 years, international visitors (overnight tourists and cruisers) passed from only 166.000 in 2001 to almost 1.6 million in 2019. TCI has been faster than any other country in the Caribbean in catching up with pre-Covid19 night tourist numbers. Overnight tourist arrivals in 2021 already accounted for about 85 per cent compared to 2019, and the first six months of 2022 saw a full recovery from pre-COVID-19 figures. While cruise passenger arrivals in 2022 were only 30 per cent lower than those recorded in 2019.

This report also takes into consideration the most current TCI tourism policies and strategies of TCIG, which are those included in the “*National Tourism Policy and Strategic Implementation Plan for the Turks and Caicos Islands*” (KMPG, 2015) and the “*TCI Tourism Strategic Plan*” (2017). Moreover, other important documents that consider a sustainable development of the tourism industry in TCI are the “*2021 A Citizen’s Contract*”, “*The Peoples Plan for Progress*”, and the “*Draft National Physical Sustainable Development Plan*”¹. Based on this TCI tourism development, the new National Tourism Development Strategy and Implementation Plan for TCI proposed by Target Euro is based on the new scenario that will be generated with the creation and implementation of the new TCI Destination Management Organisation.

The report examines the country's current tourism industry, identifying priority destinations where their tourism offer can be improved/developed. Furthermore, the strategy organised the country's tourism offer into four different tourism districts, identifying each district with its own portfolio of tourism products. These tourism products complement each other, allowing each district to integrate its offer with that of the other districts. This approach will enable TCI to integrate all its destinations into the tourism offer, facilitating inclusive growth and increased market competitiveness through the diversification of tourism products.

The report is organised into two parts including 13 chapters. **Part 1** focuses on the analysis of the current tourism demand and offers to identify which are the key factors to consider by the development strategy. It also includes the feedback about the potential tourism development of the different TCI destinations provided by the tourism stakeholders met within the field missions of the Target Euro team in TCI-this part ends with a detailed analysis of the positioning of the destination on the internet, including its reputation analysis. **Part 2** is focused on the strategy that tourist stakeholders should implement in collaboration with the TCI DMO to develop new tourism products and enhance the competitive capacity of the existing ones. This part ends with a detailed action plan and key recommendations to consider for its implementation.

¹ See Report D3-D4-D13 for more details about the tourism policy and strategy of the TCIG

PART 1

**ANALYSIS OF THE CURRENT TOURIST DEMAND & OFFER
OF TURKS & CAICOS ISLANDS**

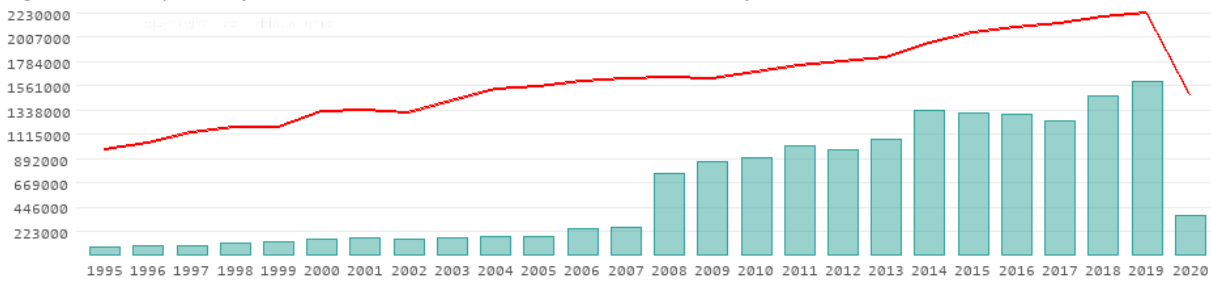
1 Current Tourism Demand

N.B. For more details, please refer to ANNEX A

1.1 Development of the Tourism Sector on the Turks and Caicos Islands from 1995 to 2020²

- The following chart shows the number of tourist arrivals³ registered on the Turks and Caicos Islands each year between 1995 and 2020. The chart shows an outstanding constant increase from 79,000 arrivals in 1995 to 1,600,000 in 2019. The decline in 2020 is evidently related to the COVID-19 pandemic outbreak.

Figure 1: Development of the tourism sector on the Turks and Caicos Islands from 1995 to 2020⁴

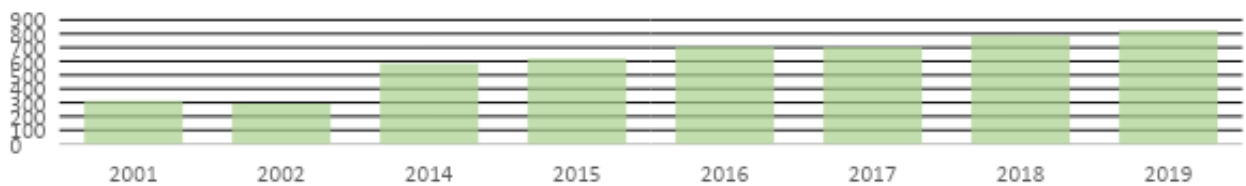


(source: worlddata.info) The red line represents the average of all 21 countries in the Caribbean.

1.2 Revenues from Tourism

- In 2001, tourism revenues amounted to 311.00 million USD which was 86.7 per cent of the gross national product. This corresponds to 166,000 tourists and an average of 1,873 USD per person. Over 17 years, the country's reliance on tourism has decreased noticeably. Before the outbreak of the COVID-19 pandemic, direct international tourism revenues were \$825.00 million USD in 2019, which was 68.9 per cent of the gross national product. Thus, each visitor spent an average of \$1,695 USD on their vacation in the Turks and Caicos Islands. This means that more tourists have visited in the last 20 years, but they spent much less (almost -\$180 per tourist).

Figure 2: Revenues from the tourism sector in TCI from 2001 to 2019⁵



Source: Elaboration of Target Euro with TCIG data

² <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

³ Notes: Anyone who spends at least one night in the country but does not live there for more than 12 months is considered a tourist. The number of people passing through within the same day, e.g., crew members of ships or flights, are also not considered tourists in most countries. If the same person travels in and out more than once within the same year, each visit counts again.

⁴ <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

⁵ <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

1.3 TCI Leads the World in Travel Demand

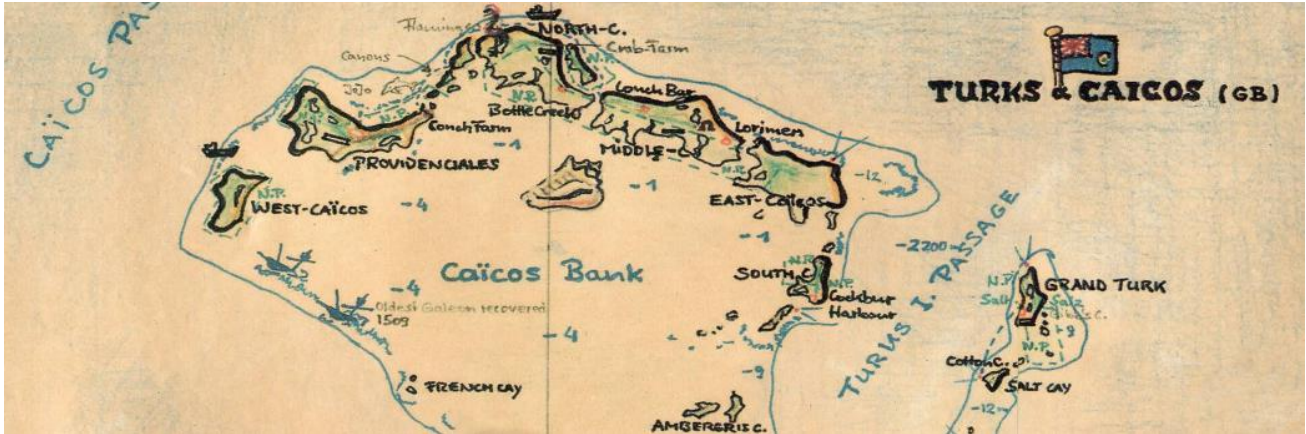
- According to TripAdvisor Consumer Sentiment Survey⁶, **Turks and Caicos Islands continue to lead the Caribbean in tourist arrivals**, and now the world, with TripAdvisor predicting a prosperous fall season for the territory.
- According to TripAdvisor’s 2022 fall travel index, released in August 2022, **TCI remains a hot spot for travellers** and is the top overall trending destination for the fall worldwide.
- "Of the locations which have seen the biggest year-on-year increase in searches on TripAdvisor by Americans for travel this fall, **the dreamy Caribbean destination Turks and Caicos is at number one,**" the Index outlines.
- TripAdvisor also reported that **TCI had seen the fastest growing demand based on year-over-year growth compared to the fall of 2021**. That is a strong sign, given the territory’s already-outstanding performance last year at this time.
- **TCI beat out traditionally leading global destinations** such as Ho Chi Min City, Singapore, London, Bangkok, Italy, and The Netherlands, among others.
- In the top 15 worldwide destinations ranked, TCI was the only Caribbean destination that made the TripAdvisor list.

⁶ The report was based on a TripAdvisor Consumer Sentiment Survey, which collected data from an online survey of over 2,700 consumers. The survey was conducted in partnership with Qualtrics, between July 6, 2022 and July 22, 2022, across six countries: theUS, the UK, Australia, Italy, Singapore, and Japan. The travel site also looked at site behavioural data sourced from first-party traffic data on the TripAdvisor platform, gathered during the week commencing July 4, 2022, for searches made by U.S. travellers from June 1, 2022, through June 30, 2022 for travel between September 1, 2022 through November 30, 2022.
<https://tcweeklynews.com/tci-leads-world-in-travel-demand-tripadvisor-reports-p12680-127.htm>

2 Selected 16 Travel Destinations

N.B. For more details, please refer to ANNEX B

Figure 3: Map of the Turks and Caicos Islands⁷



2.1 Methodology and Rationale for Choosing the 16 Islands and Cays

The Turks and Caicos archipelago has 40 main islands and cays. There are an additional 62 named very small cays and rocks. Nine islands in the Turks and Caicos are inhabited.

For the mapping, analysis, and tourism development strategy for Turks & Caicos Islands, we have considered 16 islands, cays, and rocks as being travel destinations with current tourism flows or with a tourism potential:

- The inhabited islands in the Turks and Caicos, in order of population, are Providenciales, Grand Turk, North Caicos, South Caicos, Middle Caicos, Salt Cay, Pine Cay, Parrot Cay, and Ambergris Cay.
- Additional 7 uninhabited islands, cays and rocks: West Caicos, East Caicos, Mangrove Cay, Little Water Cay, Seal Cays Wildlife Sanctuary, Cotton Cay, and Big Sand Cay / Great Sand Cay as they express an interesting tourism present or potential.

2.2 The Selected 16 Travel Destinations

The following are the 16 selected travel destinations in the Turks and Caicos Islands:

1. PROVIDENCIALES

- Providenciales (Provo)⁸, is the main destination in TCI, accounting for more than 90% of the country's tourism infrastructure and demand.

2. WEST CAICOS

- Formerly known as Belle Island, this 11-square-mile island is protected by the West Caicos Marine National Park.

⁷ Copyright 1993 by Heinz Meder

⁸ Visited in May, June, July, August, and October 2022 by consultants of Target Euro

3. MANGROVE CAY

- This scenic mangrove island is the easiest wetland paddling spot to access on Providenciales.

4. LITTLE WATER CAY

- This privately held island is home to the nature reserve of Little Water Cay, also known as 'Iguana Island.'

5. PINE CAY

- This privately-owned island, located between Providenciales and North Caicos has low-density residential development.

6. PARROT CAY

- This 1000-acre island is located east of Providenciales and is a popular destination for celebrities.

7. NORTH AND MIDDLE CAICOS

- These "twin islands"⁹ are primarily agricultural areas with limited tourism infrastructure and few visitors.

8. EAST CAICOS

- The largest and uninhabited island in TCI, East Caicos, is home to the outstanding natural wildlife and setting of Bay Cay Island, which is part of the East Bay Islands National Park.

9. SOUTH CAICOS

- This quiet island¹⁰ is supported by small-scale commercial fishing and some tourism.

10. BIG AMBERGRIS CAY / LITTLE AMBERGRIS CAY

- This 1,100-acre private island is home to three luxury resorts, including the Ambergris Cay Resort¹¹.

11. SEAL CAYS WILDLIFE SANCTUARY

- This wildlife sanctuary is made up of a group of uninhabited cays and rocks.

12. GRAND TURK

- This small tropical island¹² offers a range of water sports, historical sights, and beautiful beaches.

13. SALT CAY

- The smallest inhabited island¹³ in TCI, with a population of only 108 people.

14. COTTON CAY

- This privately owned, uninhabited island was historically used to raise cotton and sisal and features plantation ruins and field walls.

15. BIG SAND CAY

- This remote, uninhabited island (also known as Great Sand Cay) is an exceptional location for birdwatching.

16. WATER CAY

- This small island is located off the east coast of Providenciales and features beautiful beaches and clear waters.

⁹ Visited on May 3rd, and on July 26th and 27th 2022

¹⁰ Visited on May 5th and July 28th, 2022

¹¹ Visited on July 30th, 2022

¹² Visited on May 4th, and July 29th, 2022

¹³ Visited on July 30th, 2022

3 Analysis of the Primary Tourism Services

N.B. For more details, please refer to ANNEX C

The primary tourism services, including transportation, accommodation, and food & beverage, are crucial aspects of a destination. Visitor satisfaction, along with the quality, quantity, and accessibility of these services, play a significant role in encouraging tourists to stay longer and spend more.

Following is a short overview:

3.1 Transports

Arriving at TCI

Most tourists travelling to the Turks and Caicos usually take a plane to Providenciales or cruise ship to Grand Turk. For citizens or legal residents of the United States, United Kingdom, and Canada, obtaining a visa is unnecessary when visiting this destination, making it an effortless choice.

Arriving by plane

Providenciales International Airport (PLS) is the sole airport for international flights into Turks and Caicos, with direct flights from 11 North American cities and connecting flights from major United States east coast cities. British Airways operates trans-Atlantic flights via Antigua, with a layover. Flights to neighbouring Caribbean countries have become more affordable, with added routes and frequent flights offered by Caicos Express, interCaribbean, and Bahamasair.



Arriving by Cruise Ship

The Turks and Caicos have only one cruise ship port, located on Grand Turk Island. All cruise ships destined for the Turks and Caicos dock at this port, and the cruise lines take care of all immigration and customs formalities, making the arrival process straightforward. Typically, tourists stay around six hours before departing. Given the limited time available, it's impractical to visit any of the other primary islands in the country.

Arriving by Yacht

Upon arriving at the TC islands, a yacht must make its first stop at a designated port-of-entry, which includes multiple marinas on Providenciales and Grand Turk, and one each on North Caicos and South Caicos. The harbourmaster at the port of entry can grant permission to enter for one week. Suppose individuals plan to extend their stay or sail among the islands. In that case, they must obtain a Cruising Permit, valid for 90 days, or visit one of the immigration offices located on Providenciales or Grand Turk.

Moving Around in TCI



To move between the islands, small domestic flights and passenger ferries are the primary modes of transportation. Most of the population is concentrated in Providenciales and Grand Turk, which serve as transportation hubs. North Caicos and Middle Caicos are connected by a causeway, making them the only islands in the country linked by road. On the islands, rental cars, taxis, and other vehicles are the primary means of transportation, as no public transport, bus, or train services are available. Additionally, large car ferries are

absent in Turks and Caicos.

3.2 Accommodation

The Turks and Caicos Islands offer diverse vacation accommodations, each with a unique atmosphere and perspective. Providenciales features large full-service resorts and family-friendly hotels, while Grand Turk offers quaint colonial inns. The sparsely populated islands of North Caicos, Middle Caicos, and Salt Cay have small guest houses and boutique beach hotels, perfect for those who appreciate nature and seclusion.

Table 1: *Tourist Accommodation 2020*¹⁴

	Hotels	Condo Hotels	Villas	Other	Rooms
Providenciales	11	29	269	9	4,114
Grand Turk	4	-	10	-	155
South Caicos	2	-	-	-	87
North Caicos	2	-	30	1	124
Middle Caicos	-	-	3	-	13
Parrot Cay	1	-	7	-	106
Ambergris Cay	1	-	-	-	10
Pine Cay	1	-	8	-	38
Total	22	29	327	10	4,647

TCI accommodation system can be broken down into the following categories:

a) Condominiums and Mixed Condo/ EP Hotels

The condominium hotels sector has led the development of tourism in the Turks and Caicos. Condominium hotels have increased visitor numbers and helped establish a solid domestic real estate market and repeat

¹⁴ <https://tourismanalytics.com/turks--caicos.html>

tourism. These million-dollar-plus condos offer a high-end luxury product, attracting buyers who intend to live in them, use them as a vacation homes or rent them out.

Condos have always been the backbone of the country's real estate sector, and sales on the island boomed during Covid-19, with mainly US buyers flocking to the islands. Sotheby's reports that 85% of island real estate owners are from North America.

Although condos are individually owned, management companies such as the Hartling Group manage these assets for the owners while operating hotel and grounds operations, food and beverage, spa, and retail. The condo/resort business model is the foundation of the tourism industry in Turks and Caicos, resulting in a high-level product.

b) Traditional “European Plan” (EP) Hotels and Resorts

The Turks and Caicos Islands attract regional hotel chains, including traditional "EP" hotels and international brands such as Comfort Suites, Preferred Hotels & Resorts, Regent, and Sandals Resorts. The strategic priority is to attract high-end international hotel brands such as Hyatt and Marriott. Ritz-Carlton has also expressed interest in developing in the area.

Most of the available rooms on Providenciales are provided by hotels and resorts, which range from small, boutique accommodations to expansive and luxurious resorts. The other islands in the Turks and Caicos also have resorts and hotels, but they are usually smaller than those found on Providenciales.

c) Private Villas and Home Rentals

The vacation villa rental category encompasses a range of options, from luxury mansions to partitioned guest houses, which are fully furnished, often with equipped kitchens. However, room service and housekeeping are not included in most rentals other than the largest sites, unlike luxury hotels and resorts. On the positive side, vacation rentals usually offer more space and privacy.

Most vacation rentals are located on Providenciales, and the other islands in the Turks and Caicos typically have rental villas or guest houses as their primary accommodations.

d) Timeshares

Fractional timeshare ownerships are discouraged, and there are not many current operations.

e) All-Inclusive Resorts

The Turks and Caicos have nine all-inclusive resorts, five located on Providenciales and the remaining on smaller islands. These resorts usually include dining, on-site activities, and other amenities in their room rate. However, due to these added benefits, the cost of an all-inclusive room rate is often at least twice as much as a comparable room at a typical resort.

f) Bed and Breakfast Hotels

The high-end bed and breakfast category is experiencing growth due to the potential added value of this investment in the Turks and Caicos.

g) Homestay and Budget Lodging

Homestays and budget lodgings are the most economical options, with single rooms rented by the accommodation owner. Beachfront properties can be expensive, but due to the small size of the islands in the Turks and Caicos, even remote and inland accommodations are not far from the ocean.

h) Specialist Hotels for Divers, Weddings, Others

The Turks and Caicos is renowned for miles of exquisite barrier reefs, walls, clear waters, and abundant wildlife. Building on this, TCI specialist dive resorts, have been opened such as the Ocean Club Resort, Beaches Turks & Caicos Resort, Ports of Call Resort (Providenciales), Bohio Dive Resort (now closed, Grand Turk), East Bay Resort, South Caicos Ocean & Beach Resort (South Caicos).

The Turks and Caicos are known for their beautiful barrier reefs, clear waters, and abundant marine life. As a result, several dive resorts have opened, such as the Ocean Club Resort, Beaches Turks & Caicos Resort, Ports of Call Resort (Providenciales), Bohio Dive Resort (now closed, Grand Turk), East Bay Resort, and South Caicos Ocean & Beach Resort (South Caicos), to offer specialised diving experiences.

The High and Low Seasons

The tourism industry in Turks and Caicos follows a seasonal pattern, with the highest prices typically from December to April. From May to November, hotels and resorts often offer special package deals, such as free nights or reduced rates, to attract guests during the off-season. The late summer hurricane season is the least popular time for visitors, and as a result, there are fewer tourists during this time.

3.3 Food & Beverage

The Turks and Caicos Islands offer a diverse range of cuisines and flavours to satisfy foodies. While Providenciales is the primary hub for dining, each smaller island offers a unique perspective on local cuisine.

There are over sixty restaurant options on Providenciales, with many offering a fusion of international and local seafood dishes. The island also has several fine dining options, with renowned chefs creating gourmet meals. Traditional cuisine can be found in authentic Japanese, Italian, French, Mediterranean, Moroccan, Thai, Indian, Jamaican, and other restaurants.

Local food festivals, such as the Conch Festival, provide an opportunity to sample the local cuisine and learn about the island's cultural history. Island Fish Fries are also common and offer a local version of the backyard BBQ.

Hiring a private chef is a great option for vacation villas or larger resort and condominium suites with full kitchens. It's perfect for special dietary or allergy considerations, or if you catch a good catch from a fishing charter.

Deep-sea sport fishing is also a popular activity in the Turks and Caicos, and local restaurants can prepare the catch.

3.4 Shopping.

Shopping in the Turks and Caicos is not as extensive as in other major tourist destinations, but there are unique treasures to discover. The best collection of gift, art, boutique, and souvenir shops can be found on Providenciales and Grand Turk, while the smaller and less-populated islands have limited options, mostly groceries and locally-made arts and crafts.

Luxury items such as watches, jewellery, perfumes, and leather goods are available on Providenciales and Grand Turk. Duty-free products are offered at the Providenciales International Airport and the Grand Turk Cruise Center. Duty-free products are only available to non-Turks and Caicos residents.

Queen Conch shells are popular souvenirs and can be found on many beaches and at shops and markets, but there are restrictions on exporting them.

The art scene in Providenciales is diverse, with many galleries showcasing paintings, prints, sculptures, ceramics, fine art photographs, and more.

Middle Caicos distributes handmade baskets, hats, model sailboats, and authentically Turks and Caicos dolls. These items are made by older members of society using techniques passed down through generations and are woven and carved from locally harvested materials.

Several boutiques in the Grace Bay region and upscale resorts carry soaps and skincare products, including handcrafted soaps from the Turks and Caicos.

4 Outline of Tourism Attractions in TCI

The Visit TCI website¹⁵ provides an exhaustive list of all the attractions in the archipelago. They are categorised as follows:

4.1 Beaches



The Turks and Caicos Islands boast some of the world's most beautiful beaches. While the world-renowned Grace Bay Beach on Providenciales and Governor's Beach on Grand Turk are popular destinations, many smaller beaches are equally stunning.

4.2 Boat Charters & Cruises



Boat cruises and tours are the most popular activity for visitors in the Turks and Caicos, offering an unrivalled way to experience the scenic islands. Many businesses provide excursions in the area and offer charter rentals for a wide range of vessels, from tranquil sailing catamarans to luxurious yachts.

4.3 Historical Attractions



Historical attractions in the Turks and Caicos can be categorised into two groups. The first group consists of the remnants of the salt industry on Grand Turk, South Caicos, and Salt Cay. The second group includes the plantations on the Caicos Islands.

¹⁵ <https://www.visittci.com/things-to-do>

4.4 Land Sports and Activities



The Turks and Caicos Islands have an abundance of activities to enjoy both in and on the ocean. However, there are also several land-based sports and activities available, although they are more limited.

Hiking, birdwatching, and nature are popular land-based activities:

Although there are no dedicated trails, there are countless amazing coastal **hiking** locations, with North Caicos and Middle Caicos offering the top hikes. The rugged and wild coasts of Providenciales, South Caicos, and Salt Cay are also great for hiking. Each of the main islands in the Turks and Caicos offers unique and secluded beaches to explore.

Birdwatching is another popular nature activity, with over 200 species sighted in the Turks and Caicos. Saline ponds and mangrove channels are common throughout the islands, providing beautiful environments and wildlife sightings.

Horseback riding is available on Providenciales and Grand Turk, while **donkey riding** is offered on Grand Turk and Salt Cay.

Golf enthusiasts can enjoy the top-rated Royal Turks and Caicos Golf Club, featuring an 18-hole course designed by Karl Litten, located on Providenciales.

For visitors seeking a bit of excitement, guided **ATV and buggy tours** are offered on Providenciales and Grand Turk. Another option for adventure is to take a day trip to North and Middle Caicos, rent a 4x4, and explore the back roads and lesser-travelled trails.

4.5 Natural Attractions



The natural attractions in the Turks and Caicos go beyond just the beaches and can be divided into two main groups. The first group consists of coastlines, wetlands, and mangrove habitats. The second group includes karst process-formed caves, sinkholes, and blue holes.

4.6 Water Sports and Activities



The Turks and Caicos' stunning beaches have established it as a premier location for water sports:

Efoiling / Electric Hydrofoil ¹⁶	Fishing	Flyboarding	Freediving
Hobie Cat Sailing ¹⁷	Jets Skiing	Kayaking	Kiteboarding
Paddleboarding / SUP	Parasailing	Scuba diving	Sea scooting ¹⁸
Snorkelling	Snuba ¹⁹	Subwinging	Surfing
Swimming	Tubing (or banana float)	Wakeboarding	Whale watching
Windsurfing			

¹⁶ <https://flytci.tc/>

¹⁷ small and easy to sail unsinkable catamaran sailboats

¹⁸ also known as “underwater scooters” or “Diver Propulsion Vehicles” (DPVs)

¹⁹ combines elements of both snorkelling and scuba diving

5 Tourism-Based Labour Market and Migration

The economic differences within the Caribbean region that benefit only a certain number of countries (finance and tourism in the Cayman Islands, the Bahamas, Turks and Caicos Islands, Dutch Islands, and British Virgin Islands; hydrocarbons in Trinidad and Tobago), also cause migrations in the region to follow a geo-economic logic of international division of labour thanks to the new complementarities between the Caribbean economies, although this internal migration in the Caribbean is obscured by the important emigration outside the Caribbean²⁰.

While half of the Caribbean expatriates migrated to the US, Canada, United Kingdom, other Caribbean Countries such as the Bahamas, the British and US Virgin Islands, as well as the Turks and Caicos Islands are the main **receiving** countries of Caribbean migrants. Since the 1990s, Haiti, Cuba, the Dominican Republic, and Jamaica are the main sending countries²¹.

As a result, an important dimension of employment which is relevant for TCI (in line with other Caribbean countries such as the Cayman Islands and British Virgin Islands) is the share of *migrant workers* in tourism versus residents or nationals. The percentage of migrants in the total workforce is estimated around 60%, with an evident disproportion of Non-Turks and Caicos Islanders workers compared to all employed workers in the country; and, possibly, the share is even higher if considering only the tourism industry and, specifically, the accommodation sub-sector²².

Each year, thousands of young Haitians try to escape the poorest economy in the Caribbean, where 60 per cent of the population of 11 million people live on less than \$2 a day. Several thousand Haitians are thought to be living (legally or illegally) in shantytowns across the island of Providenciales, with an estimated population of 24,000²³. This situation poses possible difficulties and conflicts with long-term residents.

The migration status is particularly relevant if one considers the fact that work permit holders are often ineligible for benefits and social assistance measures, as is the case for the Turks and Caicos Islands, and most other Caribbean countries²⁴.

²⁰ Audebert, C. (2011) 'Régionalisme et migrations dans la Caraïbe', in Dubesset, E. and Lucas, R. (dir.), *La Caraïbe dans la mondialisation: Quelles dynamiques régionalistes ?*, L'Harmattan, pp. 23-37

https://halshs.archives-ouvertes.fr/halshs-00805771/file/AUDEBERT_2011_Regionalisme_et_migrations_dans_la_Caraibe.pdf

²¹ <https://www.migrationdataportal.org/regional-data-overview/migration-data-caribbean>

Audebert, 2011; IMF, 2017

<https://www.open-diplomacy.eu/blog/migratory-patterns-in-the-caribbean-impacts-and-perspectives-for-caribbean>

²² "Tourism sector in the English- and Dutch speaking Caribbean: An overview and the impact of COVID-19 on growth and employment", ILO, July 2020

²³ <https://www.france24.com/en/20190210-tiny-turks-caicos-overwhelmed-haitian-influx>

²⁴ Ibid.

6 Impressions and feedback resulting from direct interactions with local stakeholders.

N.B. For the list of interviewed stakeholders, please refer to ANNEX D.

Besides the continuous interaction with members of the DMO Advisory Committee, the Target Euro team also encountered a selection of stakeholders in all the islands beyond Providenciales.

The details of their insights, visions, impressions, and feedback concerning a possible change in the tourism development model of the Turks and Caicos Islands are reported in Annex D.

Following are some statements and outcomings:

- Each destination should have its one tourism product. For instance, North & Middle Caicos have a different nature and wildlife than Providenciales, so they should focus on different tourism markets/segments. Local stakeholders in North & Middle Caicos stated they do not want the same development as Providenciales.
- Adventure tourism is considered a priority product for the twin islands of North and Middle Caicos.
- Deep sea fishing is a potentially interesting tourism product for South Caicos, but specific skills are lacking in the destination.
- Ecotourism activities in Grand Turk focusing on Gibbs Cay could be of high potential for the tourism development of this destination. In addition, “unique ecotourism” is a product with great opportunities for many destinations in TCI.
- Some stakeholders suggested that they “get back to the roots” of tourism in Turks & Caicos Islands when in the 70s, it was considered a paradise for divers.
- A great potential exists for many typologies of events: cultural, religious gatherings, etc. Cultural tourism related to the salt industry is also considered of interest, even if the relaunch of the salt industry is considered problematic.
- Inter islands connections should be developed, as it is currently difficult to fly to important destinations in the countries. For instance, the weekly flights to Salt Cay are considered extremely limited.
- Tourism development must be sustainable. Innovative solutions should be considered, especially to reduce costs related to energy and water consumption.
- Finally, part of the stakeholders recommended simplifying processes and authorisation/bureaucracy.

7 Online Research and Analysis on Turks & Caicos as a Tourism Destination

N.B. For more details, please refer to ANNEX E

7.1 Web-Based Research on Keywords Associated with Turks & Caicos

Target Euro conducted web-based research focusing on the findings on the Google web browser (first page with references) concerning Turks & Caicos as a tourism destination.

The following keywords and references resulted related to TCI on Google (web research on 04 Nov 22):

- turquoise waters
- white sand beaches
- Caribbean's best kept secret
- tropical archipelago
- British Overseas Territory
- pristine marine
- overseas territory of the United Kingdom in the West Indies
- bay
- cays
- resorts
- limited local medical care
- caution, crime

Fonts:

<https://turksandcaicostourism.com>

<https://en.wikipedia.org>

<https://www.visittci.com>

<https://www.gov.tc> (TCI government)

<https://www.britannica.com>

<https://www.beaches.com>

<https://en.wikivoyage.org>

<https://travel.state.gov> (US gov)

7.2 Analysis of Tourism Packages Offered Online

To help understand how the destination Turks and Caicos is sold online and what kind of packages are available, TE analysed the TCI tour packages that appear on the first page of the Google research browser, by using the keywords **“Turks and Caicos Tour packages”**.

In addition, the following keywords were verified:

- “Turks and Caicos Tour package”
- “Turks and Caicos” “Tour packages”
- “Turks and Caicos” “Tour package”
- "TCI" "Tour packages"

The following Google References (excluding announcements/ads) resulted on the **first page** of the Google browser On December 19th, 2022:

1. “Turks and Caicos Tour packages” = **0 references**
2. “Turks and Caicos Tour package” = **0 references**
3. “Turks and Caicos” “Tour packages” = **94,800 references**.

None of the web references intensified in the analysis relates to tour packages, but rather to excursions, day trips and boat-yacht rentals.

4. “Turks and Caicos” “Tour package” = 58,700 references.
5. “Turks and Caicos” “holiday package” = 26,700 references.

At a first glance, the web is not offering classical holiday packages flight + accommodation + transport.

This is a significant outcome of the Google research, as it means that almost the entire market is based on tourists looking autonomously for accommodation solutions in Turks and Caicos and consequently finding the most suitable flight connections to reach the archipelago.

7.3 TCI Digital Marketing Strategy Assessment

- Website

Being the easiest source of information for tourists to find, especially when searching for “Turks and Caicos” on Google, the TCI website <https://www.visittci.com/> is a crucial tool and open the door to learning more about the Turks & Caicos Islands.

The menu is rich in entries and pages, providing online users with plenty of information to look through. However, there might be room for improvement as all those entries sometimes seem redundant. For instance, pages like FAQ, Entry Requirements, and Quick Facts include fairly similar information that could be merged. Tourists looking for information concerning their arrival on the Turks & Caicos islands, the currency, tipping habits, language, telephone, bank specificities, etc., might not always navigate easily through the pages.

In addition, by sharing valuable content which highlights the most attractive features of the islands as well as the list of partners and service providers, the website would become even more useful to tourists.

- Blog

The TCI blog <https://turksandcaicostourism.com/blog-turks-caicos-journal/> is a good additional source of information for users, as the articles focus on some aspects of the destination that are not particularly detailed in the rest of the website. By exploring more in-depth the culture, events and activities, the blog highlights the attractiveness of the islands and what visitors can expect over there. However, those interesting contents could be optimised, and their potential enhanced with an SEO strategy that would improve the referencing of the blog posts and a more regular publication calendar to create an expectation from tourists waiting for future articles.

- Social Media

By being present on different social media platforms such as Facebook, Instagram, Twitter and YouTube, the TCI tourist board reaches different demographic segments.

The Facebook account is the only TCI account that is verified. However, on Instagram, another Turks and Caicos account is present and more popular than the official tourist board's one. With 5 times more followers, the Instagram account <https://www.instagram.com/turksandcaicos/> is the first one appearing to users when searching TCI-related content.

There is a huge potential for growth in the social media presence, notably on Instagram, since over 1 million posts are tagged with #turksandcaicos.

On Facebook, Instagram and Twitter, the pictures posted are always the same, and it is not possible to identify a clear strategy for each platform. Yet, an improvement could enhance the digital presence of the destination, notably by putting more focus on the description of the posts, which are now quite short and do not call for interaction.

Conclusions on the analysis of digital marketing strategy for TCI

From our analysis, we could not identify a clear digital marketing strategy for the TCI tourist board. Yet, interesting and promising structures are already present and could just be improved by getting inspiration from other tourist board activities.

The website is a great source of information, especially as users can browse through an extensive list of service providers present in the destination. Still, additional content could give real added value to the website by highlighting the most attractive features of the destinations with explanatory texts and high-quality pictures. In addition to that, enriching the list of service providers with an interactive search and booking system would offer a personalised experience to users while promoting tourism stakeholders more effectively. Tourists would get a selection of accommodations or experiences that match their taste, and tourism stakeholders would be more directly promoted to the right target.

A regular posting schedule also seems crucial to structure the blog and social media organisation and encourage users to regularly follow the tourist board's publications. Moreover, having a consistent editorial line and tone would harmonise all contents and strengthen the brand image. The blog is a great source of information as it allows the TCI to mention topics not promoted on the rest of the website. Optimising the articles with SEO techniques would allow the blog to be referenced on Google and shown to more people, attracting more potential tourists to the Turks and Caicos Islands.

More detailed content, including CTA, could be proposed for the social media accounts to enrich the aesthetic pictures that are being shared online and to create more engagement and interaction in-between tourists and the destination. Diversifying the types of content and the topic to broadcast reels and short videos would allow the promotion of the destination as a whole and not only based on sea-related features. Users' content

are reposted, which is already a great way to involve users. A real community could be built with a strategy focused on creating interaction and sharing content suitable for each platform and each target.

7.4 Social Media-Based Reputation Analysis

Methodology:

To carry out a social media-based Reputation Analysis²⁵ of Turks & Caicos as a tourism destination, Target Euro used data provided by Olerly²⁶ to analyse the Reputation of Turks & Caicos with Data extracted directly from written reviews and mentions on the following social media platforms: TripAdvisor, Google, Expedia.com, Booking.com, Open Table, Hotels.com, Yelp, Orbitz, Facebook, Travelocity, CheapTickets, Agoda, and Holidaycheck.de.

A. Sentiment Analysis:

Olerly uses software that analyses reviews and evaluates the tone, intent, and emotion within each review on social media in 14 native languages to determine **the guest sentiment**.

Two banks of Lexicons are identified:

- Positive/Neutral/Negative keywords
- Sentiment Rating Keywords – e.g., waiter, service

B. Numerical Rating:

Positive and Negative Sentiment Ratings Keywords are converted into a Numerical Score of 1-10

C. TES Traveller Experience Score:

Uniting the Sentiment Analysis (A) and Numerical Ratings (B), Olerly generates an easy-to-understand *Traveller Experience Score (TES)* on key indicators of the destination.

The analysis – with a date range of 6 months from 2022-07-07 to 2023-01-07 - focuses on three specific categories:

- 1) Accommodation
- 2) Attraction
- 3) Restaurant

The following results regard the entire country of Turks & Caicos, including Grand Turk, Middle Caicos, North Caicos and Providenciales. Data on other islands and cays are not available.

²⁵ Online Review status: we analyse a range of reviews tourists leave on online sources such as Facebook, Google, TripAdvisor, Booking.com, and Foursquare. This will provide us with valuable information on how TCI is viewed by its visitors, as well as highlight areas for improvement and additional marketing that will be key areas for the development of the DMO. This information will be provided thanks to an online platform designed by Target Euro called **Toumake**.

²⁶ Olerly is a leading Sentiment Analysis Technology in the Hospitality Industry <https://olery.com/> and <https://guest-experience.com/>

1) Category: Accommodation



As shown in the table, the overall sentiment is 9.0 for the category “**accommodation**”, based on the tone, intent, and emotion considering reviews on 13 different social media²⁷. While the numerical overall is 9.2, based on Positive and Negative Sentiment Ratings Keywords.

By combining the overall sentiment and numerical ratings, the resulting Traveller Experience Score (TES) related to accommodation in Turks and Caicos is an exceptional 9.1.

The highest rating relates to the location (9.6).

2) Category: Tourist Attraction & Services



The *overall sentiment* is 9.4 for the category “**Tourist Attraction & Services**”, covering 68 different categories of tourist attractions and services²⁸ ranging from “*4WD, ATV & Off-Road Tours*” to “*Water-skiing & Jet-skiing*” and is based on reviews on three different social media²⁹. While the *numerical overall* is 9.5.

By combining the overall sentiment and numerical ratings, the resulting Traveller Experience Score (TES) related to tourist attractions and services in Turks and Caicos is an outstanding 9.5.

The top 10 attractions and services result being the following (9.9 rating):

- Bike Tours
- City Tours
- Cultural Tours
- Food & Drink
- Historical & Heritage tours
- Motorcycle tours
- Shark Diving
- Speed Boat Tours

²⁷ Sources: TripAdvisor, Google, Expedia.com, Booking.com, Open Table, Hotels.com, Yelp, Orbitz, Facebook, Travelocity, CheapTickets, Agoda, and Holidaycheck.de

²⁸ The detailed list of the 68 attractions and services is included in Annex E.

²⁹ Sources: TripAdvisor, Google, Facebook

- Swimming with Dolphins
- Vespa, Scooters & Moped Tours

3) **Category: Restaurant**



The *overall sentiment* is 9.3 for the category “**Restaurant**”, based on reviews on 5 different social media³⁰. While the *numerical overall* is 8.9. The resulting Traveller Experience Score (TES) related to restaurants in Turks and Caicos is an excellent 9.1.

Ambience is considered the most valuable aspect of restaurant experiences in TCI (9.3).

³⁰ Sources: Google, TripAdvisor, Open Table, Yelp, Facebook

8 SWOT Analysis

This section has been based on the analysis of the current tourism demand and offer of TCI and considering the different meetings held by the Target Euro team with the major tourism stakeholders in the country. The aim is to outline the main strengths, weaknesses, opportunities, and threats to be considered for the identification of the tourism development strategy and implementation plan for TCI.



The Target Euro team uses the SWOT analysis as a strategic planning technique to evaluate the strengths, weaknesses, opportunities, and threats of TCI as a tourism destination. The acronym SWOT stands for:

- **Strengths:** Internal factors that give an advantage to the destination, such as strong reputation, unique tourism assets, and skills
- **Weaknesses:** Internal factors that could limit the destination’s success, such as lack of resources, ineffective processes, or poor tourism organisation
- **Opportunities:** External factors that the destination could exploit, such as new markets, emerging technologies, or changes in customer preferences
- **Threats:** External factors that could pose a risk to the destination, such as increased competition, economic downturns, or regulatory changes

This SWOT analysis will help identify areas where the destination could improve its performance and develop strategies to capitalise on its strengths, mitigate its weaknesses, take advantage of opportunities, and manage its risks.

<p style="text-align: center;">S</p> <p style="text-align: center;">Strengths</p>	<p style="text-align: center;">W</p> <p style="text-align: center;">Weaknesses</p>	<p style="text-align: center;">O</p> <p style="text-align: center;">Opportunities</p>	<p style="text-align: center;">T</p> <p style="text-align: center;">Threats</p>
<ul style="list-style-type: none"> ● World-renowned luxury destination, with high-end resorts and amenities that cater to affluent travellers. ● Extraordinary natural beauty with wonderful beaches and clear waters. ● Proximity to the USA, making it easily accessible for North American travellers. 	<ul style="list-style-type: none"> ● Limited international air connectivity with only a few airlines offering regular flights to and from Providenciales ● Very limited internal air connectivity from Provo to other islands in the country ● Limited tourism products diversification (mainly focused on sea/water activities) ● Limited collaboration between stakeholders of the different tourism destinations ● Limited entertainment opportunities offered to cruise passengers (with consequently limited economic impact generated) ● Very limited tourism development in many destinations in TCI. The Country has limited local tourism infrastructure outside of the high-end resorts (in Provo), which can make it difficult for visitors to explore the islands independently. 	<ul style="list-style-type: none"> ● The different islands in TCI offer opportunities for developing new tourism offerings, such as cultural or adventure tourism, to attract a wider range of visitors. ● The increasing popularity of eco-tourism presents an opportunity for the islands to showcase their pristine natural environment and attract environmentally conscious travellers. ● The development of the international airport in Provo and the plan to reorganise the airport infrastructures in other islands in TCI promoted by the TCI Airports Authority could expand air connectivity to the different TCI destinations making them more accessible to travellers. ● The new tourism organisation promoted by the TCIG with the creation of the Smart DMO and the new Department of Tourism Regulations represents a concrete action to make the TCI tourism ecosystem more competitive, sustainable and resilient. ● The organisation of a data-driven Market Intelligence Unit within the Smart DMO represents a clear competitive advantage for TCI over all its competitors in the Caribbean region. 	<ul style="list-style-type: none"> ● High Regional competition from other destinations that offer similar natural attractions and tourist offers and are investing heavily to strengthen the tourism industry. ● Vulnerability to natural disasters such as hurricanes, which can disrupt tourism and cause long-term damage to the local economy. ● Economic instability in key source markets such as the United States and Europe could reduce demand for tourism to TCI, and more in general to all the Caribbean region. ● Concerns related to health and safety, such as the COVID-19 pandemic, can discourage travellers from visiting the islands.

PART 2

**STRATEGY FOR FUTURE DEVELOPMENT OF TOURISM IN
TURKS AND CAICOS ISLANDS**

9 TCI National Tourism Development Strategy

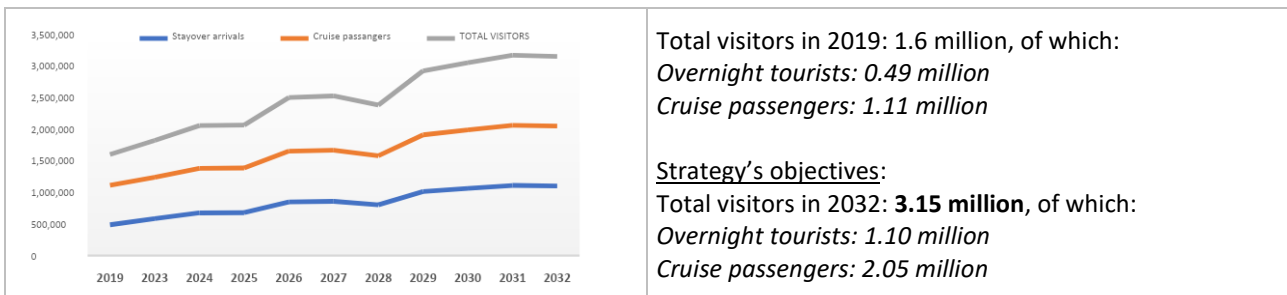
As already said, tourism is the major driving force of the Turks and Caicos Islands economy, accounting for 65% of GDP in 2021. The TCIG is currently undertaking a transformation of the TCITB into a smart DMO and DTR (Department of Tourism Regulations within the Ministry of Tourism) that will be completed by June 2023. This transition is expected to improve the efficiency and effectiveness of the tourism ecosystem in TCI and the current National Tourism Development Strategy has been designed taking into consideration this new organisation of the TCI tourism ecosystem.

9.1 Objectives of the Strategy

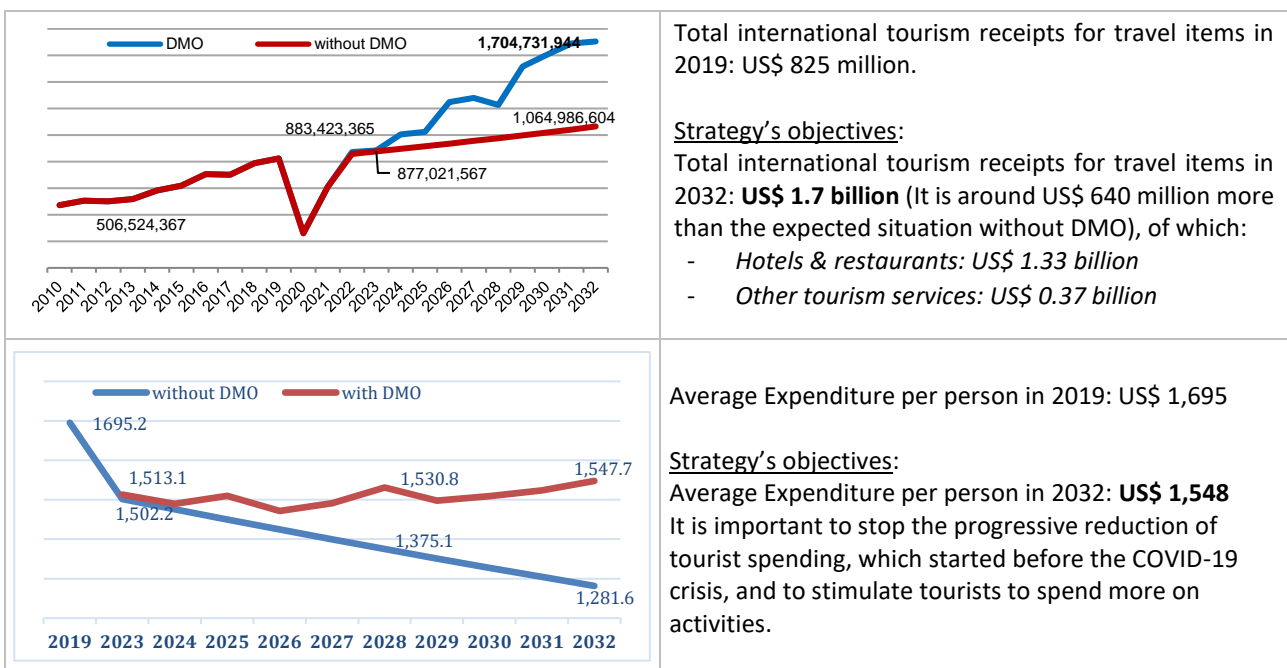
Considering the current situation of the tourism ecosystem in TCI, tourism stakeholders should pursue stabilising TCI’s long-standing and excellent positioning in the international tourism markets.

The quantitative objectives of the TCI tourism development strategy for the next ten years are based on the projections carried out by the Target Euro team considering the scenario with the DMO and are as follows:

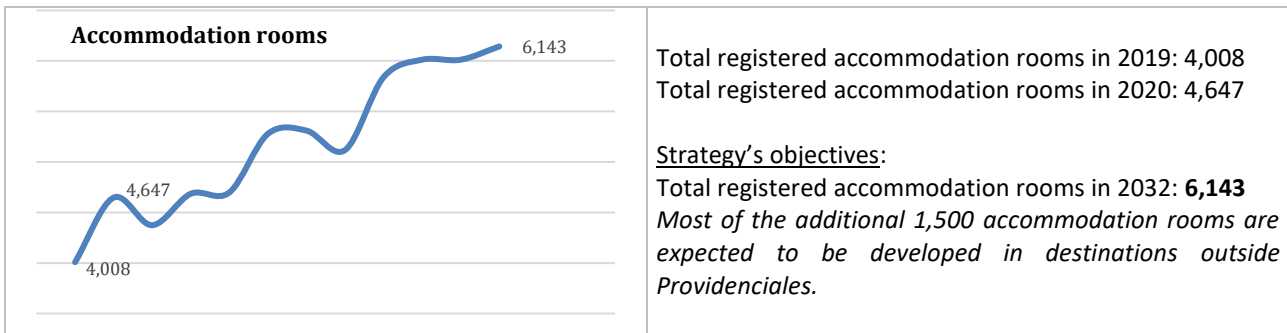
1. Increase in the number of visitors:



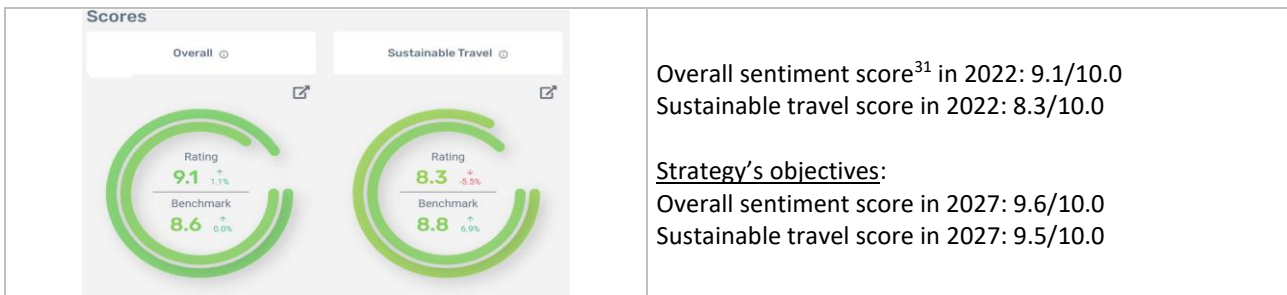
2. Increase in tourism revenue:



3. Development of tourism infrastructure:



4. Improvement of the visitor experience:



Finally, important additional objectives of the tourism development strategy are as follows:

- Improve/develop the connectivity from Providenciales to all other tourism destinations in the Country. This is specially referred to as air connectivity.
- Diversify the current offer of tourism products and strengthen the existing ones to diversify the current tourism segments and markets.
- Consolidate the current major markets of origin of the tourism demand to TCI, USA, Canada and UK, and increase the share in new potential markets in Europe (Germany, Italy, France, Spain, Benelux, etc.), Latin America (Brazil, Colombia, Chile, Argentina, etc.) and Caribbean region.
- Improve the quality of working conditions and increase the number of job opportunities for the TCI population.

9.2 Structure of the Strategy and Action Plan

For an easy understanding of the action plan and its activities and how they are connected with the Strategy, the following conceptual map summarises the logical steps composing the development strategy.



The **pillars** are the foundations of the tourism development strategy, and they are directly connected with the tourism development objectives of the strategy.

³¹ Database for year 2022 has been provided by Orelly.com and they are based on the social networks and tourism booking platforms analysis carried out from August to December 2022.

Each pillar has one or more **strategic lines** that address specific tourism development issues. These strategic lines will guide the tourism stakeholders towards the pillars. In addition, each strategic line is linked to specific **outputs**, which represent the Strategic Interventions that will allow the strategy to clearly identify the specific **activities** that tourism stakeholders must carry out to implement the tourism development strategy.

9.3 Development Pillars for the TCI Tourism Ecosystem

Based on the outputs of the SWOT analysis, the tourism development strategy for the Turks and Caicos Islands is based on three development pillars as follows:

1. Inclusive growth
2. Sustainability
3. Competitiveness

These three pillars aim to facilitate the current TCI tourism ecosystem to become more sustainable, resilient and competitive in the regional and international tourism market. The new DMO will follow these pillars that the TCIG is launching in 2023.

1. **Inclusive Growth**

It mainly refers to the need to extend the development of the tourism ecosystem to other destinations in the country, generating economic development opportunities, especially for local populations. The diversification of tourism supply through the development of emerging tourist destinations in the TCI is an important theme of the national tourism strategy.

2 **Sustainability**

Sustainability refers to the need to promote tourism development that is socially, economically, environmentally, and culturally sustainable in the long term. Social and economic development must find a compromise with the need to preserve and enhance TCI's world-class natural and cultural heritage assets.

3 **Competitiveness**

Tourism is a highly dynamic industry, influenced by exogenous and endogenous factors that continually challenge the competitive capacity of the tourism stakeholders of a destination towards its target markets. Consequently, public and private stakeholders in TCI must activate those processes to stimulate and to ensure that all tourism businesses can maintain their competitive capacity in the market.

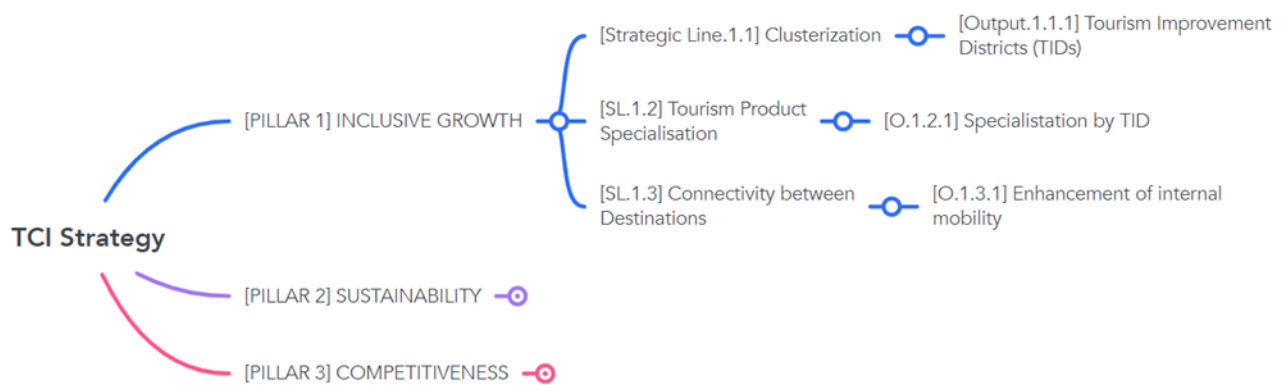
9.4 Strategic Lines and Outputs

Considering the above three pillars (inclusive growth, sustainability, and competitiveness), the logical framework to define the outputs that will drive the definition of the Action Plan and related Specific Actions (SA) of the tourism strategy are linked to the following **Strategic Lines (SL)**:

Figure 4: Conceptual Map with the Outlines of the TCI Strategy



[PILLAR 1] INCLUSIVE GROWTH



Pillar 3 “Inclusive Growth” has three Strategic lines and each one with a specific output as follows:

CLUSTERISATION [STRATEGIC LINE.1.1]

Tourism Improvement Districts (TID) [Output 1.1.1]

Grouping of islands to set up 4 DESTINATION clusters: Tourism Improvement Districts (TID). This means grouping islands with similar characteristics, culture, natural resources, and attractions to create a unique and compelling tourism experience for visitors. By doing so, tourists are encouraged to stay longer, explore more, and spend more money on the local economy. Collaboration among stakeholders, including the government, private sector, and local communities, is crucial to achieving successful cluster-based tourism development.

TOURISM PRODUCT DIVERSIFICATION [STRATEGIC LINE 1.2]

Specialisation by Tourism Improvement District [Output 1.2.1]

Cluster-based tourism development allows for creating specialised and diversified products in each TID that cater to the different interests and preferences of travellers. For example, grouping based on their cultural heritage (e.g., salt production) to promote cultural tourism. This approach also facilitates sharing resources, knowledge, and expertise among different islands within the cluster, leading to greater efficiency and sustainability in tourism development.

CONNECTIVITY BETWEEN DESTINATIONS [STRATEGIC LINE 1.3]

Enhancement of internal mobility [Output 1.3.1]

To strengthen the overall tourism ecosystem and launch new tourism products, TCI needs to improve internal mobility and enhance connectivity between the various tourist destinations and islands. This can be achieved by investing in the development of efficient transportation systems, improving the road, airport, and port infrastructures, and enhancing new sustainable means of transportation such as electrically assisted bicycles and electric vehicles (EVs).

[PILLAR 2] SUSTAINABILITY

To further establish TCI as a leading destination for ecotourism, green tourism, and sustainable tourism, it is crucial to implement measures and initiatives focusing on sustainable development. This will involve prioritising the conservation of environmental and cultural resources, which are integral to the unique and special identity of the islands.

In addition, the development of new tourist segments, as "product looking", will require preserving the islands' natural, cultural, and social environments. This will add value to the experiences offered to visitors and provide them with the freedom to explore and enjoy the islands while minimising negative impacts.

Overall, the success of TCI as a sustainable tourism destination depends on preserving its natural and cultural capital, which is a key element that defines the islands and makes them unique. Therefore, it is essential to continue to focus on sustainable development and promote responsible tourism practices that prioritise the conservation of the islands' natural and cultural resources. This will ensure that TCI continues to attract tourists who appreciate the beauty and diversity of the islands and who value sustainable tourism practices.



Pillar 2, Sustainability, has three Strategic Lines and five Outputs as follows:

SUPPORTING SUSTAINABLE TOURISM DEVELOPMENT [STRATEGIC LINE 2.1]

Supporting sustainable tourism development involves taking action to ensure that tourism activities and businesses are environmentally, socially, and economically sustainable over the long term. By adopting sustainable practices and initiatives, TCIG could ensure that tourism in TCI continues to provide economic, social, and environmental benefits for current and future generations. This strategic line includes the following outputs:

Supporting Responsible Tourism [Output 2.1.1]

Encouraging responsible tourism is important for promoting the sustainable tourism development of Turks and Caicos, minimizing negative impacts on the environment and the local population.

TCIG should promote a tourism development that is mindful and respectful of the local environment and culture, and finding ways to support sustainable tourism practices.

ENVIRONMENTAL PROTECTION AND CLIMATE CHANGE MITIGATION [STRATEGIC LINE 2.2]

Environmental protection and climate change mitigation are critical for the sustainability of the tourism industry. In TCI, the tourism industry is closely linked to the natural environment, and its activities can significantly impact natural resources, ecosystems, and climate change. This strategic line includes the following outputs:

Investment in green technologies [Output 2.2.1]

Renewable sources produce only a low% of the total amount of Turks & Caicos electricity. This mix of energy sources heavily affects the Jamaican balance of payments.

To reduce the country's dependence on imported fossil fuels, which dramatically increased last year, a shift to green energy should be fostered and to renewable energy generation, such as photovoltaic, solar, and hydrogen.

Increasing environmental protection and climate change resilience [Output 2.2.2]

The tourism industry can profoundly impact the environment, and it is essential to take steps to minimise these impacts and foster sustainable tourism. This involves implementing a range of actions that can help mitigate tourism's negative effects on the environment and promote sustainable practices in the industry. These actions can help create a more sustainable tourism industry that benefits the environment and local communities.

HERITAGE VALORISATION [STRATEGIC LINE 2.3]

Tourism valorisation of cultural heritage assets refers to using cultural heritage resources and attractions to create tourism products and experiences that generate economic, social, and cultural benefits for local communities and visitors. Many destinations use the valorisation of the natural and cultural assets as a powerful tool for driving economic development, preserving cultural and natural heritage, and promoting sustainable tourism. This strategic line includes the following outputs:

Supporting local culture, traditions, and customs [Output 2.3.1]

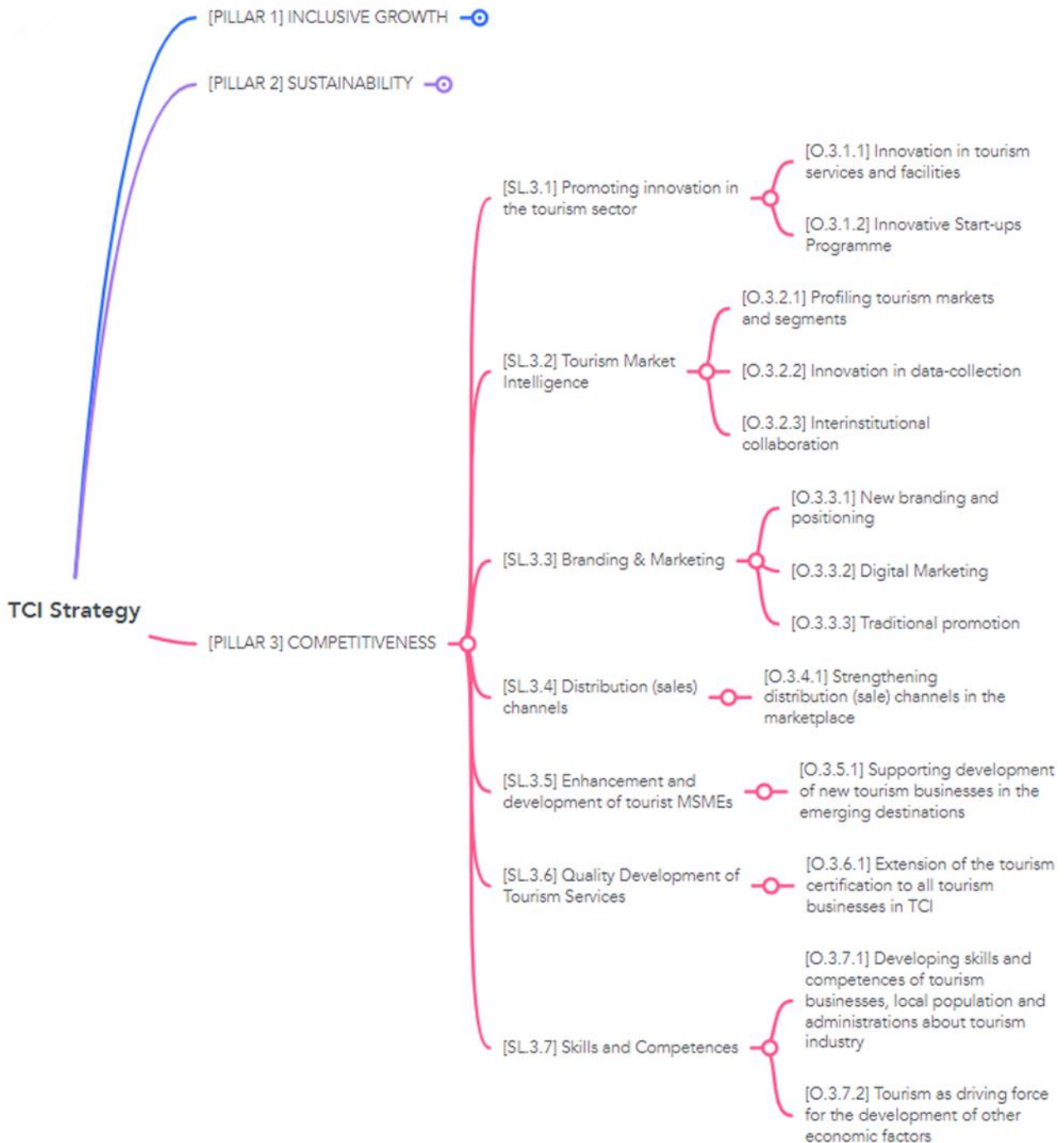
To let tourists fully appreciate and experience the TCI destinations, it is important to support and promote the local culture, traditions, and customs.

Rehabilitation of natural and heritage sites [Output 2.3.2]

Heritage valorisation aims to preserve, rehabilitate, and promote the natural and cultural assets of the TCI destinations while simultaneously providing economic benefits to the local community.

[PILLAR 3] COMPETITIVENESS

Fostering competitiveness in the Turks and Caicos tourism ecosystem is important for attracting tourists, improving the quality of tourism products and services, encouraging innovation, driving economic growth, and maintaining sustainability. By striving to be more competitive, destinations and businesses can benefit themselves and the wider tourism industry.



Pillar 3, Competitiveness, has seven Strategic Lines and thirteen Outputs as follows:

PROMOTING INNOVATION IN THE TOURISM SECTOR [STRATEGIC LINE 3.1]

The tourism industry is a highly dynamic industry that is constantly evolving and changing its characteristics. Several factors contribute to this dynamic nature of the industry, including changes in consumer preferences,

advances in technology, and shifts in global economic and political conditions. For this reason, the long-term sustainability of the tourism industry should be supported by the TCIG stimulating innovation in the tourism sector to assist businesses operating in this industry to be prepared to adapt to these changes to remain competitive and successful. The outputs of this strategic line are as follows:

Innovation in tourism services and facilities [Output 3.1.1]

Innovation in tourism products, services, and accommodations is crucial for creating a competitive edge in the global tourism market and attracting new segments of tourists to TCI. Introducing new and captivating tourism offers, TCI can re-enforce its strong brand image and offer a unique experience to visitors.

To foster innovation in the tourism sector of TCI, both public and private actors should introduce new, fascinating, and exciting tourism products, services, and accommodations to the international market. This is particularly important for creating specialised tourism clusters that cater to the diverse interests of visitors.

To attract new market segments, it is crucial to offer a range of new services that appeal to tourists interested in specific types of tourism products. This can be achieved by re-designing existing services or introducing entirely new ones. These new services should be closely linked to the innovative tourism products being developed.

It is recommended that one or more islands in TCI focus on developing accommodations that meet the unique needs and expectations of these new tourists to diversify the tourism supply chain and attract new segments. For example, to appeal to visitors interested in outdoor adventure and ecotourism, new typologies of accommodations, such as glamping, can be designed to suit their specific requirements.

Innovative Start-up Programme [Output 3.1.2]

Revamping the tourism industry through innovation is a critical to the Innovative Start-up Programme. One of the primary objectives should be to support technology start-ups that can bring about significant changes and advancements in the tourism sector.

TOURISM MARKET INTELLIGENCE [STRATEGIC LINE 3.2]

Relying on market intelligence is an important to any effective marketing strategy. It allows businesses to stay up-to-date on changing market conditions and consumer behaviour, and make informed decisions about how to best reach and engage with their target audiences.

TCIG and tourism businesses can better understand the needs and preferences of different market segments and tailor their products, services, and marketing messages accordingly. It will also allow stakeholders to identify untapped markets or niches and create targeted marketing campaigns that resonate with specific audiences. Finally, tourism market intelligence will be extremely important for assessing the real impacts generated by the tourism industry in terms of quality of economic development and environmental preservations in TCI. The outputs of this strategic line are as follows:

Profiling of tourist markets and segments [Output 3.2.1]

Profiling of tourist markets and segments aims to understand the behaviour, preferences, and characteristics of different types of tourists. To achieve this, a Tourism Observatory should be organised to collect and analyse data on tourist markets and segments. The collected data can be used to assess new tourism markets and segments, enabling the development of targeted marketing strategies to attract these tourists.

Innovation in data collection [Output 3.2.2]

Innovation in data collection involves agreements with international tourism digital platforms and promoting the digitalisation of the tourism industry. This initiative will provide access to a wealth of information on tourist behaviour, preferences, and characteristics, which can be used to improve the targeting and effectiveness of marketing efforts.

Interinstitutional Collaboration [Output 3.2.3]

Interinstitutional collaboration is extremely important to achieve the goals of tourism development. This includes the organisation of a permanent inter-ministerial roundtable to facilitate cooperation and coordination between different government agencies involved in the tourism sector.

BRANDING AND MARKETING [STRATEGIC LINE 3.3]

Branding and marketing are essential elements of the tourism industry, as they play a key role in attracting visitors and promoting destinations, products, and services. TCI should develop a unique identity and personality related to its products, allowing it to distinguish itself from other destinations in the Caribbean region and create a positive image in the minds of visitors. A strong brand can help attract visitors, build loyalty, and differentiate a destination or product from its competitors. The outputs of this strategic line are as follows:

New Branding and Positioning [Output 3.3.1]

Output 3.3.1 focuses on developing new branding and positioning for the Turks and Caicos Islands as a tourism destination. The primary goal of this initiative is to create a distinct and recognisable identity that sets the destination apart from its competitors.

Digital Marketing [Output 3.3.2]

To enhance the digital presence of TCI and promote its growth as a tourism destination, a new *digital marketing strategy* should be developed. This strategy should prioritise the following goals, which will guide the global digital activities and ensure consistent and effective actions:

- Enhance the quality of the user's online experience and the information available on the website.
- Raise awareness about TCI as a tourism destination.
- Streamline the booking process and effectively highlight local providers.
- Foster engagement with tourists, both current and potential, to build a strong community.
- Implement a robust after-trip process to increase positive word-of-mouth and encourage repeat visits.

By focusing on these goals, the new digital marketing strategy can improve the visibility and reputation of TCI as a top tourism destination. The enhanced user experience, increased awareness, and efficient booking process will attract more visitors to the destination. In contrast, the community-building and after-trip process will foster loyalty and encourage repeat visits.

Traditional Promotion [Output 3.3.3]

Incorporating traditional tourism promotion actions to attract tourists to Turks & Caicos should still be considered in the Branding and Marketing Strategy. This can be achieved through actions such as Print Advertising, Television and Radio Advertising, Trade Shows and Exhibitions, Public Relations, Direct Mailing, and Tourist Information Centres.

DISTRIBUTION CHANNELS [STRATEGIC LINE 3.4]

The importance of distribution channels in the tourism sector cannot be overlooked. By exploiting these channels effectively, tourism businesses can reach a wider audience of potential customers, improve the customer experience and optimise the distribution of their offers, resulting in increased revenue and growth. The outputs of this strategic line are as follows:

Strengthening distribution channels in the tourism marketplace [Output 3.4.1]

Strengthening distribution channels is crucial for destinations and businesses in the tourism industry of Turks and Caicos Islands to reach their target market, increase revenue, and reduce risk. By utilising OTAs and social media platforms, building relationships with travel agents and wholesalers, and investing in technology, TCI destinations and businesses will expand their distribution channels and grow their businesses and tourism flows.

ENHANCEMENT AND DEVELOPMENT OF SMMEs [STRATEGIC LINE 3.5]

The enhancement and development of SMMEs in the tourism industry are important for promoting economic growth, diversifying tourism offerings, increasing competitiveness, fostering community involvement, and promoting sustainability. In particular, by providing support and resources to SMMEs, TCIG will help the tourism industry become more inclusive and sustainable, benefiting local communities and visitors alike. The output of this strategic line is as follows:

Supporting development of new tourism businesses in the emerging destinations [Output 3.5.1]

The government of TCI should promote the establishment and growth of good-quality micro and small enterprises throughout all the islands, particularly those that are not located on Providenciales and, to some extent, Grand Turk.

To encourage the emergence and success of such businesses within a fair, competitive environment, it is crucial to foster networking principles and provide financial support targeted at investments in infrastructure, machinery, equipment, and digital technologies.

QUALITY DEVELOPMENT OF TOURISM SERVICES [STRATEGIC LINE 3.6]

Quality development of tourism services is essential for the tourism industry to remain competitive, attract and retain customers, maintain a positive reputation, promote sustainable tourism development, and increase revenue. By investing in quality development, TCIG could help tourism businesses enhance the overall customer experience and contribute to the long-term success of the TCI tourism industry. The outputs of these strategic lines are as follows:

Extension of the tourism certification to all tourism businesses in TCI [Output 3.6.1]

The extension of tourism certification to all tourism businesses will benefit the industry, the businesses themselves, and the customers. It will improve quality standards, increase competitiveness, provide resource access, and enhance customer satisfaction.

SKILLS AND COMPETENCIES [STRATEGIC LINE 3.7]

The development of skills and competencies in the tourism industry is essential for providing high-quality customer service, improving productivity and efficiency, staying competitive, fostering innovation and creativity, and promoting sustainable tourism development. TCIG should help tourism businesses to invest

in employee development with the aim to enhance the overall tourism experience and contribute to both the long-term sustainability and competitiveness of the tourism industry in TCI. The outputs of these strategic lines are as follows:

Developing skills and competencies of tourism businesses and local population about the tourism industry [Output 3.7.1]

To establish successful and well-managed businesses related to new tourism products, accommodations, and services, it is imperative to implement education and vocational training programs. These programs should be mandatory for start-ups and a commitment to ongoing education for those already in the industry. This will ensure sufficient quality and competence across the tourism sector.

To achieve success in the tourism industry, more is needed to simply rely on market intelligence and new product development. Public administrators must also provide support, knowledge, and policies to facilitate capacity building. This will enable the industry to keep pace with evolving trends and remain competitive.

Tourism as a driving force for the development of other economic sectors [Output 3.7.2]

To foster economic growth and development in tourism, a Tourism Integration Initiative similar to Jamaica's "Tourism Linkages Program" should be implemented. This initiative aims to link the tourism economy with other sectors, such as craft industries, creating a symbiotic relationship that benefits multiple areas of the local economy.

10 Action Plan and Specific Actions

Based on the logical framework to define the tourism development strategy, the three targeted outcomes (sustainability, inclusive growth, and competitiveness), and the related Strategic Lines (SL), the Action Plan has been designed based on the following series of Specific Actions (SA) to be implemented to achieve the expected Outputs:

[PILLAR 1] INCLUSIVE GROWTH

1.1 Strategic Line: Clusterisation

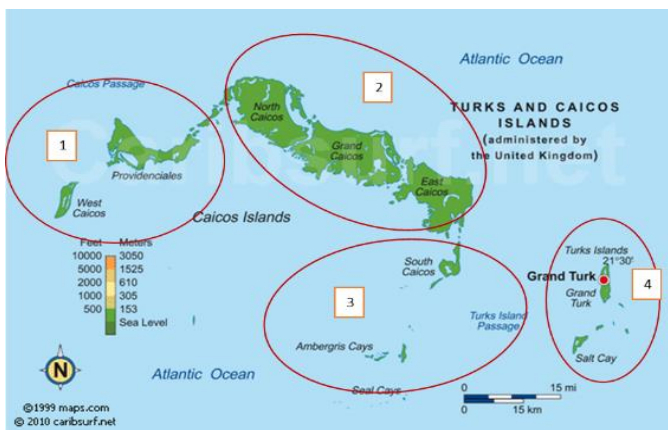
1.1.1 Output: Tourism Improvement Districts (TIDs)

1.1.1.1 Specific Action: Organisation of permanent local committees

Over the past 30 years, destinations have developed Tourism Improvement Districts (TIDs) as an innovative model for financing DMOs. TIDs are geographical areas characterised by specific integrated tourism offers developed mainly in the UK and the USA. For example, the Target Euro team identified 193 TID destinations in 18 States in the USA in 2021, and 12 additional States were implementing a TID in at least one city.

TIDs are programmes that involve a partnership with government organisations and local private businesses, where private businesses opt-in to fund or co-fund tourism budgets in their areas. As we will see in the chapter dedicated to the financial model of the DMO (Chapter 7), the voluntary contributions coming from the private sector and the compulsory tourist levy to be paid by all overnight tourists visiting TCI will represent the main source of financial sustainability of the DMO in the long term that will finance activities to develop the tourism industry in each TID.

The TCI DMO intends to set up the following **four TIDs** in TCI, each one totally different from the others:



- **TID 1:** Providenciales / West Caicos / Mangrove Cay / Little Water Cay / Parrot Cay
- **TID 2:** North Caicos / Middle Caicos / East Caicos
- **TID 3:** South Caicos / Ambergris Cays / Seal Cays
- **TID 4:** Grand Turk / Salt Cay / Cotton Cay / and Lesser Cays

Each TID should be organised as a permanent voluntary local committee representing each of the 4 TIDs grouped based on geographic criteria.

The DMO TCI will use the TIDs to manage the tourism destinations in collaboration with local tourism stakeholders, taking permanently into consideration their needs and expectations into consideration. In particular, the main characteristics of the TIDs in TCI will be as follows:

- **Specialised focus**: TIDs focus specifically on improving the local tourism industry rather than addressing a broader range of community needs. The Tourism Development Strategy for TCI prepared by the Target Euro team includes the tourism product specialisation for each TID.
- **Collaborative governance**: the DMO will be governed by a board of representatives from private and public stakeholders. In addition, the private sector representatives in the DMO board will be TCI associations and individuals representing each TID.
- **Local control**: TIDs allow local businesses and other stakeholders to take control of tourism-related issues and initiatives rather than relying solely on the government or other outside organisations.
- **Flexibility**: TIDs can be created and operate in a variety of ways, depending on the specific needs and goals of the community.

Based on these characteristics, each TID in TCI will be characterised by its own tourism offer that should complement the other TIDs in the Country. This diversification will allow the country to diversify its current tourism markets and segments, attracting more overnight tourists and increasing the economic impacts on the national economy.

In addition, the use of the TIDs by the DMO makes possible a higher focus on the development of the entire tourism ecosystem in TCI, not only based on the promotion activities but also on the development of those infrastructures, facilities and services that will be essential to diversify the tourism offer and include other TCI destinations into the national tourism offer. So some of the expected benefits of TIDs that the DMO will manage include:

- **Increased tourism in all destinations in TCI**: By collectively funding and managing tourism-related activities and improvements, TIDs can help to attract more visitors to the different areas and boost the local economy.
- **Improved infrastructure and amenities**: TIDs can use their funds to improve local infrastructure, such as sidewalks and public transportation, and to add amenities such as tourism circuits, visitor centres, public art, etc.
- **Higher property values**: TIDs can also have a positive impact on property values as a result of the improved infrastructure, amenities, and increased tourism.
- And of course, **increased marketing**: the DMO will use its funds to increase marketing and promotion efforts promoting both the country as an all, but also activating punctual promotional activities for each TID, which can help to attract more visitors and boost visibility for local businesses.

1.2 Strategic Line: Tourism Product Diversifications

1.2.1 Output: Specialisation by Tourism Improvement Districts (TIDs)

1.2.1.1 Specific Action: Organisation of the new tourism product portfolio

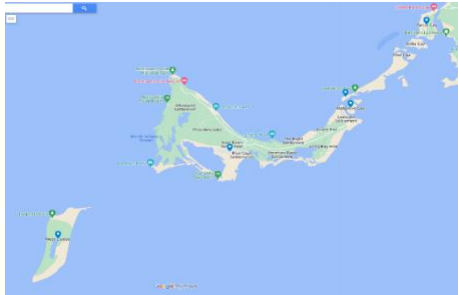
For each TID, Target Euro has identified 1 or 2 **PRIORITY Tourism Products** and other **SECONDARY** Products, either being already *present* or with a *potential* for development.

N.B. For details on Tourism Products please refer to ANNEX F

TID 1: Providenciales / West Caicos / Mangrove Cay / Little Water Cay / Parrot Cay

This Tourism Improvement District (TID) totals over 30,000 inhabitants.

Figure 2: Map³² of islands and cays which are grouped as TID 1



TOURISM PRODUCTS

This TID expresses many tourism products with different levels of potentiality.

PRIORITY Potential & Present Tourism Products in TID 1 are the following:

A. LUXURY TOURISM

The priority tourism product LUXURY is based on a combination of **SIX (6)** products:

Providenciales: Priority Product



- A.1 Sun & Sea**
- A.2 Shopping & Entertainment**
- A.3 Nautical tourism: Sailing, Boating & Yachting**
- A.4 Culinary tourism: Foodies**
- A.5 Golf**
- A.6 Incentives**

B. WATER-BASED SPORTS

The second priority product for TID 1 is based mainly on the huge variety of water-based sports and activities which are already offered in Providenciales. In fact, with some of the finest beaches in the Caribbean, it's no wonder that the Turks and Caicos excel as a water sports destination:

B.1 Scuba diving / Deep Sea Diving	B.2 Kiteboarding / Kitesurf ³³	B.3 Kayaking / Canoeing	B.4 SUP / Stand-up paddleboarding
B.5 Snorkelling	B.6 Freediving	B.7 Jet ski	B.8 Windsurfing
B.9 Surfing	B.10 Parasailing	B.11 Wakeboarding	B.12 Semi-submarine
B.13 Tubing / Banana boat	B.14 Swimming	B.15 Snuba ³⁴	B.16 E-Foiling ³⁵
B.17 Subwinging ³⁶	B.18 Flyboarding	B.19 Sea scootering	

³² Adaption created with My Google Maps

³³ There are currently no laws or regulations against kiteboarding on any beaches in the country. Due to the spectacular setting and safe environment, any kite newcomers to the Turks and Caicos should start at Long Bay Beach, regardless of skill level. <https://www.visittci.com/north-caicos-middle-caicos/things-to-do/kiteboarding>

³⁴ Snuba is often referred to as hookah diving and is a fun and interesting way to explore shallow reefs. This unique water sport combines elements of both snorkelling and scuba diving.

³⁵ Efoil, short for Electric Hydrofoil, is an electric powered motorised surfboard.

³⁶ consists of a rider being dragged at slow speed underwater behind a boat while holding onto a small-winged board.

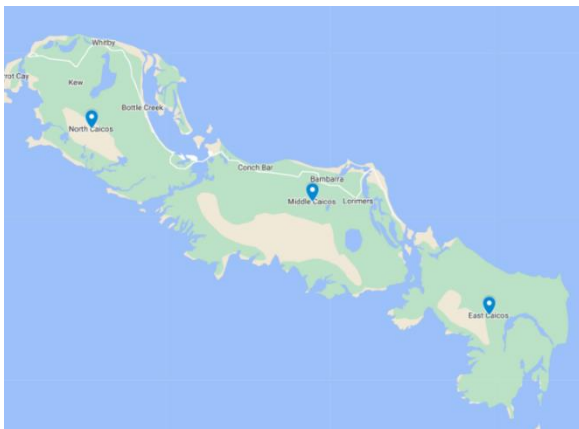
SECONDARY Potential & Present Tourism Products in TID 1 are the following:

- C. Shark watching
- D. MICE tourism: conferences
- E. Event Tourism
- F. “Soft” Ecotourism
- G. Fishing tourism

TID 2: North Caicos / Middle Caicos / East Caicos

This Tourism Improvement District (TID) totals around 2,700 inhabitants.

Figure 3: Map³⁷ of islands and cays, which are grouped as TID 2



TOURISM PRODUCTS

The feasibility of the development of the tourism products of TID 2 depends on a crucial variable: the **STATUS QUO** scenario vs. the **ALTERNATIVE** scenario:

- a) The **STATUS QUO SCENARIO** refers to the present situation of connections between Providenciales and North Caicos, based on water-based connections (boats...) and, possibly, private aircraft.
- b) The **ALTERNATIVE** scenario is based on creating a land-based connection through a highway connecting Providenciales with North & Middle Caicos, then Middle Caicos with East Caicos and, finally, East Caicos with South Caicos. Following a Florida Keys-style development, this scenario would radically change the tourism development model of North & Middle Caicos as it probably would follow the already existing successful model of Providenciales.

PRIORITY Potential & Present Tourism Products in TID 2 are the following:

a) OUTDOOR ADVENTURE

The priority tourism product **OUTDOOR ADVENTURE** is based on a combination of **FIVE (5)** products in the *status quo* scenario for North & Middle Caicos:

1. Hiking / Trekking
2. Birdwatching
3. Cycling / Biking
4. Off-Road exploring
5. Glamping



³⁷ Adaption created with My Google Maps

b) CLIMATE NEUTRAL ECOTOURISM



East Caicos / Bay Cay

CLIMATE NEUTRAL ECOTOURISM

<p>Bird watching</p> <ul style="list-style-type: none"> • Unique birds (Cuban crow)
<p>Sea wildlife watching:</p> <ul style="list-style-type: none"> • Whales watching • dolphins, stingrays/eagle rays, starfishes
<p>Land wildlife watching:</p> <ul style="list-style-type: none"> • Reptiles - snakes, iguanas • 1000s Wild donkeys • Pink flamingos • Blue land crabs

The priority tourism product **CLIMATE NEUTRAL ECOTOURISM** is based on a combination of **FIVE (5)** products in the *status quo* scenario.

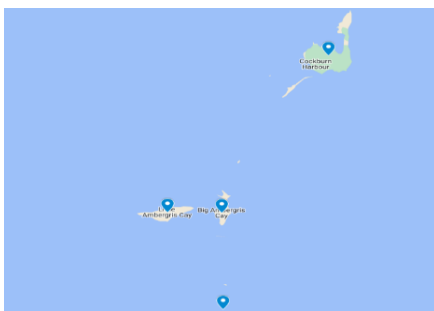
SECONDARY Potential & Present Tourism Products in TID 2 are the following:

- C. Sun & Sea
- D. Water sports
 - D.1 Kayaking
 - D.2 Stand-up paddleboarding / SUP
 - D.3 Kiteboarding / Kitesurf
- E. Photography
- F. Fishing
- G. Plantation tourism

1.2.1.1.1 TID 3: South Caicos / Big Ambergris Cay / Little Ambergris Cay / Seal Cays

This Tourism Improvement District (TID) totals around 1,200 inhabitants.

Figure 4: Map³⁸ of islands and cays which are grouped as TID 3



TOURISM PRODUCTS

This TID expresses many tourism products with different levels of potentiality.

1. PRIORITY Potential & Present Tourism Products in TID 3 are the following:

³⁸ Adaption created with My Google Maps

South Caicos

FISHING

Deep sea fishing	
Big fish	
Bone fishing	
Fly fishing	
Fishing tournaments	
Fishermen's local community / Community-Based Tourism	

A. FISHING TOURISM

The priority tourism product FISHING is South Caicos based and includes various typologies of fishing.

B. DIVING

C. LUXURY

2. Other SECONDARY Potential & Present Tourism Products in TID 3 are the following:

- D. BOATING & SAILING
- E. HISTORY OF THE SALT INDUSTRY
- F. SUN & SEA
- G. BIRD WATCHING
- H. WHALE WATCHING
- I. SHARK WATCHING
- J. ECOTOURISM

TID 4: Grand Turk / Salt Cay / Cotton Cay / Big Sand Cay

This Tourism Improvement District (TID) totals over 5,000 inhabitants.

Figure 5: Map³⁹ of islands and cays which are grouped as TID 4



TOURISM PRODUCTS

These islands and cays are physically distant from the other islands, as they are separated by the “Columbus Passage”⁴⁰. Therefore, they partially specialise in tourism products different from the other TCI TIDs:

1. PRIORITY Potential & Present Tourism Products in TID 4 are the following:

- A. DIVING
- B. CRUISE
- C. WHALE WATCHING
- D. ECOTOURISM

2. Other SECONDARY Potential & Present Tourism Products in TID 4 are the following:

Other Secondary Potential & Present Tourism Products:

- E. BIRDWATCHING AND NATURE PHOTOGRAPHERS
- F. THE OLD SEA SALT INDUSTRY & PLANTATION RUINS
- G. WELLNESS & SPA
- H. DEEP SEA FISHING
- I. COMMUNITY-BASED TOURISM (CBT)
- J. SUN & BEACH
- K. GEOTOURISM
- L. MICE: SPORTS AND BUSINESS EVENTS

³⁹ Adaption created with My Google Maps

⁴⁰ representing a passage over 7,000 feet deep inside the archipelago that connects the Atlantic Ocean to the Caribbean

Recap TIDs tourism product specialisation by cluster

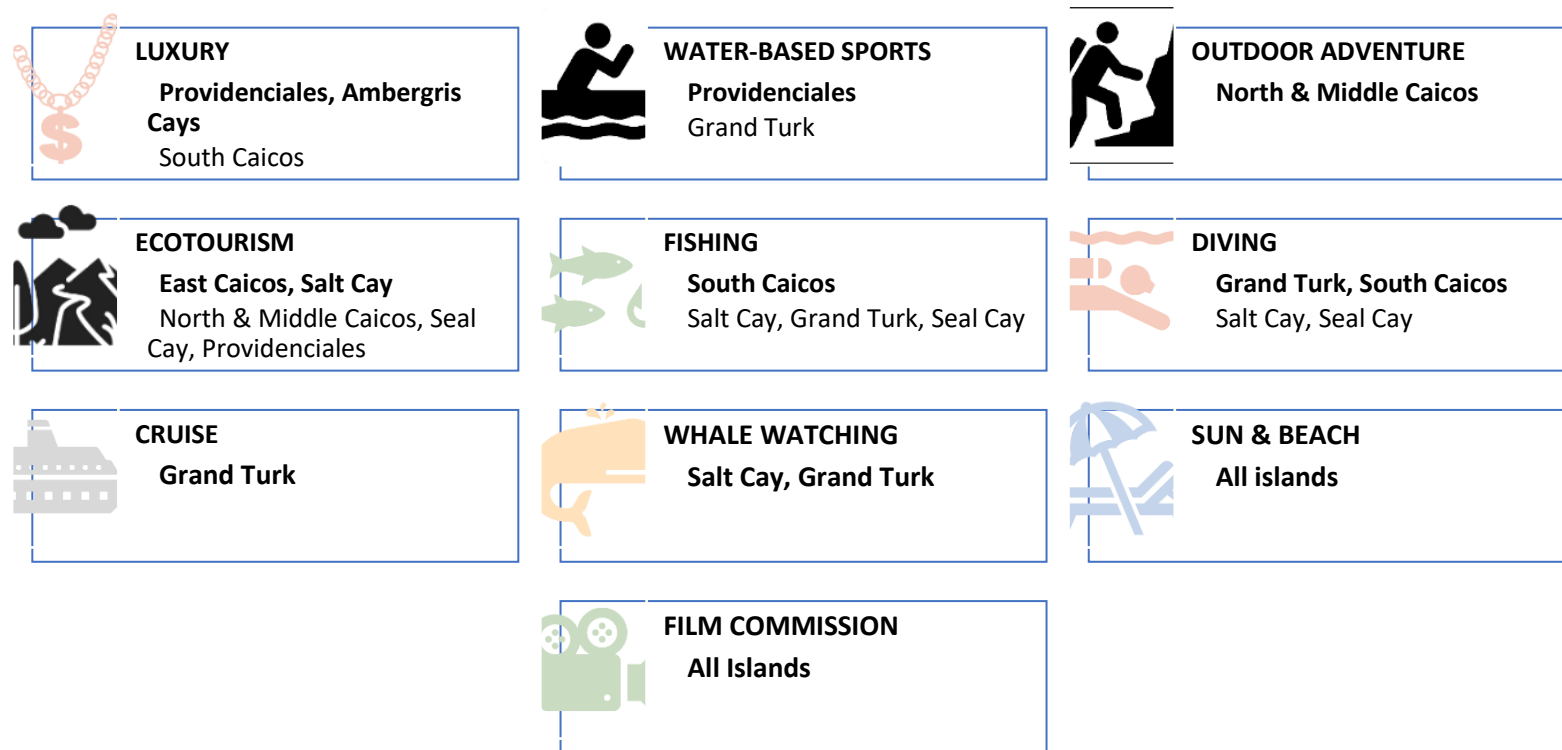


Two additional tourism products are transversal to all 4 TIDs:

- **Sun & Beach**
- **Film tourism & Film Commission**

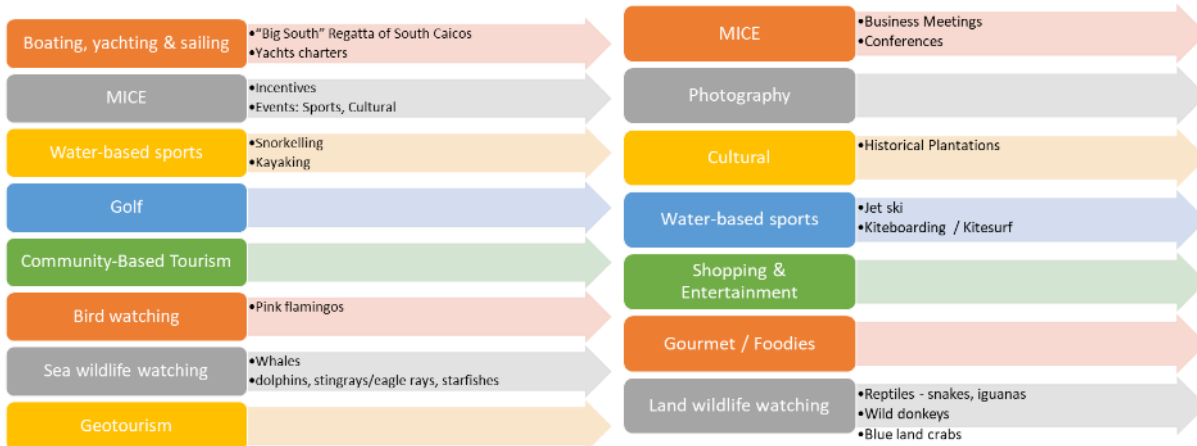
Based on the priority “specialisations” of the islands, the following **10 TOP PRIORITY** tourism products can be outlined:

Figure 6: priority tourism products



• **Middle Priority**

• **Low Priority**



1.3 Strategic Line: Connectivity between destinations

1.3.1 Output: Enhancement of internal mobility

1.3.1.1 Specific Action: Development of the airport infrastructures

This specific action focuses on developing airport infrastructure in TCI. This includes completing the airports of the "minor" islands, such as North Caicos, South Caicos, and Salt Cay.

The completion of airport infrastructure in these islands is essential to improve their connectivity with the rest of the country (especially Providenciales, the international arrival hub) and promote their growth as tourism destinations. This will not only enhance the tourism offerings of the islands but also support local businesses and create new job opportunities.

By investing in "minor" airport infrastructure development, TCI can become more accessible to tourists and increase its competitiveness as a tourism destination. Additionally, the completion of airport infrastructure in the "minor" islands will help distribute tourism's economic benefits more evenly across the region.

The TCI Government has been investing in the development of the airport infrastructure to improve the travel experience for visitors and to support the growth of the tourism industry. In addition, in collaboration with the TCI Airport Authority, it is actually promoting the:

- expansion and modernization of the Providenciales International Airport;
- upgrading of smaller airports;
- introduction of new air routes.

1.3.1.2 Specific Action: Incentives for developing new sustainable means of transportation.

Incentives for developing new sustainable means of transportation for tourism purposes are designed to encourage businesses and individuals to invest in sustainable transportation options that are environmentally friendly and have a lower carbon footprint.

The tourism industry is a significant contributor to greenhouse gas emissions, with transportation being one of the largest sources. Therefore, promoting sustainable transportation options is essential to reduce the industry's environmental impact.

By providing incentives, such as tax credits or subsidies, for developing sustainable transportation options for tourism purposes, the government can encourage businesses and individuals to invest in these alternatives. These incentives can help offset the costs of implementing new technologies and make sustainable transportation options more affordable and accessible.

The benefits of sustainable transportation options are not limited to environmental factors but can also enhance the tourist experience. For example, electric vehicles, bikes, or scooters can provide tourists a unique and sustainable way to explore a destination, reducing traffic congestion and improving air quality.

Incentives for developing new sustainable means of transportation for tourism purposes can help reduce the environmental impact of the tourism industry while promoting innovative and unique tourism experiences for visitors.

[PILLAR 2] SUSTAINABILITY

2.1 Strategic Line: Supporting sustainable tourism development

2.1.1 Output: Destination Enhancement Fund

2.1.1.1 Specific Action: Creation of a tourism Destination Enhancement Fund

The creation of a “tourism destination enhancement fund” in TCI can have numerous benefits for the preservation, valorisation, development, and promotion of the natural and cultural heritage assets of the region.

This fund should be used for the following purposes:

- Provide a reliable and sustainable source of funding for the conservation and preservation of the natural and cultural heritage assets of TCI. These assets are crucial for tourism as they attract visitors and enhance their experience.
- Support the development and promotion of new tourism products and experiences that are based on TCI's unique natural and cultural heritage assets. This can create new economic opportunities and diversify tourism product offerings, attracting a wider range of visitors.
- Enhance the capacity and skills of local communities to participate in the tourism industry, fostering the sustainable development of the sector and providing long-term benefits to the local economy.

The TCI Government should delegate the new DMO to use the Fund to implement all the activities described above.

2.1.1.2 Specific Action: Awareness campaign to tourists and the local population about responsible tourism practices.

Numerous destinations are promoting responsible tourism practices to minimise environmental impact, preserve cultural heritage, and support local communities. Tourists are being encouraged to participate in these responsible tourism practices by reducing plastic waste, conserving water, and minimising their carbon

footprint. Additionally, TCI will provide information about the Tourist Guest Fee, which all tourists are required to pay upon arrival.

The goal of these efforts is to raise awareness among tourists about the importance of responsible tourism practices and the impact they can have on the environment and local communities. By encouraging responsible tourism practices, destinations like TCI can minimise the negative impact of tourism while promoting sustainable tourism development that benefits both tourists and local residents.

2.2 Strategic Line: Environmental protection and climate change mitigation

2.2.1 Output: Investment in green technology

2.2.1.1 Specific Action: Develop initiatives and measures to encourage investments in green technologies.

Encouraging investments in green technologies in tourism can have numerous benefits, including reducing the carbon footprint of the industry, enhancing the tourist experience, and promoting the adoption of sustainable practices. Now renewable sources produce only a low% of the total amount of Turks & Caicos electricity. This mix of energy sources heavily affects the Jamaican balance of payments.

To reduce the country's dependence on imported fossil fuels, which dramatically increased last year, a shift to green energy should be fostered and to renewable energy generation, such as photovoltaic, solar, and hydrogen.

To encourage investments in green technologies in tourism, initiatives and measures can be developed that provide fiscal advantages and infrastructure support.

One way to provide fiscal advantages is through tax credits or other incentives for businesses that invest in green technologies. These incentives can offset the costs associated with implementing new technologies, making them more financially feasible for businesses.

Additionally, infrastructure support can be provided to encourage the adoption of green technologies. This can include the installation of electric vehicle charging stations or the development of renewable energy infrastructure. Such initiatives can make it easier for businesses to transition to green technologies and promote the use of sustainable energy sources.

2.2.1.2 Specific Action: Training and support of start-ups in green technologies.

The specific action aims to provide training and support to start-ups operating in green technologies. This action is designed to equip start-ups with the necessary knowledge and skills to develop and implement sustainable business practices. The training and support provided will cover various aspects of sustainable business practices, such as resource management, waste reduction, and energy efficiency. Through this action, start-ups can improve their environmental performance and reduce their carbon footprint.

In addition to providing training and support to start-ups, the specific action also targets large hospitality companies. These companies will be able to benefit from the expertise of start-ups in the field of green technologies. Large hospitality companies can learn about the latest sustainable practices and technologies by collaborating with start-ups and implementing them in their operations. This collaboration can also lead to developing new sustainable products and services, which can help these companies stay competitive in the market.

The training and support of start-ups in green technologies for large hospitality companies is an important step towards achieving sustainability in the hospitality sector. By promoting sustainable practices and technologies, this action can contribute to the reduction of environmental impacts and the development of a more sustainable and resilient industry.

2.2.2 Output: Increase environmental protection and climate change resilience actions

2.2.2.1 Specific Action: Development of a "green infrastructure" programme applied to the tourism industry.

This action involves the development of a program that promotes sustainable practices in the tourism industry. This includes the implementation of green technologies such as renewable energy sources, the reduction of energy and water consumption, and the adoption of waste reduction and recycling strategies. By creating a "green" destination, TCI can attract different types of visitors interested in "green" and sustainable tourism and create new job opportunities in the green technology industry.

2.2.2.2 Specific Action: Implement short-term initiatives to mitigate the effects of rising sea levels and floods.

This action focuses on implementing short-term solutions to mitigate the effects of climate change on TCI's tourism industry. This includes the development of natural and architectural water barriers to protect the coastline from the impacts of rising sea levels and floods. Water drainage systems can also be implemented to manage water runoff and prevent flooding in low-lying areas. These initiatives can help to reduce the risk of damage to tourism infrastructure and protect the natural environment.

2.2.2.3 Specific Action: Create a circular economy programme applied to big cultural and sport events.

This action involves the development of a circular economy programme applied to large cultural and sports events, such as music concerts, football/cricket/athletic events, etc. This programme would focus on reducing waste, promoting recycling, and ensuring that the events are environmentally sustainable. By promoting circular economy principles, the programme can help to reduce the environmental impact of these events and promote sustainable practices in the tourism industry.

2.2.2.4 Specific Action: Short-term initiatives to mitigate the effects of hurricanes.

This action involves implementing short-term solutions to mitigate the impact of hurricanes on the tourism industry. This includes developing infrastructure, facilities, and equipment for tourism enterprises to reduce damage caused by hurricanes. The initiative can also enhance opportunities for natural and open-air tourism by promoting activities that are less impacted by hurricanes, such as hiking and wildlife watching and for greater enjoyment of the sea, the main tourist attraction of TCI.

2.2.2.5 Specific Action: Programme guaranteeing of good quality water and a secure water supply.

This action focuses on developing a programme to guarantee good quality water and a secure water supply for tourists. This includes reducing water consumption by water-efficient technologies and protecting water reserves from the impact of salinization of coastal water sources as well as by launching awareness campaigns. By ensuring a reliable and high-quality water supply, TCI can enhance the tourist experience and promote sustainable tourism practices.

2.2.2.6 Specific Action: Programme to combat the reduction of marine natural resources and coral reefs.

This initiative focuses on developing a programme to combat the reduction of marine natural resources and coral reefs. This includes the regeneration of marine resources such as mangroves and coral reefs (Example: Coral Reef Gardner Program - see Punta Cana project) and involving local fishermen in a sustainable tourism development model. By promoting sustainable fishing practices and protecting marine ecosystems, TCI can ensure the long-term sustainability of the tourism industry.

2.2.2.7 Specific Action: Programme to combat environmental problems.

This initiative involves the implementation of a programme to combat environmental problems such as waste management, plastic in the sea, sewage, and the cleaning of beaches. This includes developing waste management strategies, promoting recycling, and implementing measures.

2.2.2.8 Specific Action: Programme to introduce sustainability standards.

Developing a programme to introduce sustainability standards in tourism is crucial for TCI to maintain a sustainable and competitive tourism industry while protecting the environment and providing economic benefits to local communities.

To develop a programme to introduce sustainability standards in tourism, the following steps can be taken:

- Establish a sustainability task force consisting of stakeholders from the tourism industry.
- Conduct a sustainability assessment to identify areas that need improvement.
- Develop sustainability standards that are specific to TCI's tourism industry.
- Establish a certification program to recognize tourism operators that meet the standards.
- Provide training and education to ensure the successful implementation of the standards.
- Promote sustainability standards to raise awareness and position TCI as a leader in sustainable tourism.

2.3 Strategic Line: Heritage Valorisation

2.3.1 Output: Supporting local culture, traditions, and customs

2.3.1.1 Specific Action: Interpretation and documentation (Natural and Cultural Heritage assets)

Interpretation and documentation of natural and cultural heritage assets is a crucial aspect of preserving and promoting the rich heritage of Turks and Caicos. This action aims to document and interpret natural and cultural heritage assets, which include landscapes, ecosystems, cultural landmarks, historic buildings, and artefacts. Documentation involves gathering information, researching, and cataloguing the assets to create a comprehensive record. This record serves as a valuable resource for understanding and appreciating a place's natural and cultural heritage.

TCIG could launch a national concourse involving all schools in the country to investigate on the heritage of natural and cultural assets in the country. The competition could be organised by themes (e.g. architecture, industrial heritage, fishing tradition, etc.) and schools could be invited to produce a detailed story telling for each theme.

2.3.1.2 Specific Action: Promotion of new gastronomic events

Promoting new gastronomic events can be an effective way to promote local culture, traditions, and customs. This action involves creating new food-related events that showcase the local gastronomic heritage, such as historical salt production, traditional recipes, and local ingredients. Promoting these events makes it possible to attract food enthusiasts and tourists interested in experiencing the local cuisine and culture.

The historical salt production in Turks and Caicos is an excellent example of how gastronomic events can be used to promote local culture and traditions. Salt production has been an essential economic activity in the country for centuries, often associated with local customs and traditions. Creating food-related events showcasing the history and traditions of salt production, such as salt festivals, can help promote this activity's cultural significance and attract tourists interested in learning more about it.

Similarly, promoting local traditional recipes and ingredients can help to preserve and promote local culture and traditions. Creating food-related events that showcase local dishes, such as food fairs and culinary tours, can help promote a place's culinary heritage and attract tourists interested in experiencing local cuisine.

In addition to promoting local culture and traditions, gastronomic events can also contribute to the economic development of a place. By attracting tourists and food enthusiasts, these events can create new economic opportunities for local businesses, such as restaurants, cafes, and food producers.

2.3.1.3 Specific Action: Involvement of Local Communities

Involving the local community in cultural activities to promote and preserve local traditions and customs. This can be achieved through organising cultural festivals, art exhibitions, and workshops where local people participate and share their knowledge and skills with visitors.

An awareness programme could be launched addressed to the local population on the possibilities of economic improvement through tourism offered in their islands to reduce the massive internal migrations from all the islands towards Providenciales.

2.3.2 Output: Rehabilitation of natural and heritage sites

2.3.2.1 Specific Action: Rehabilitation of the salt marshes in Grand Turk and Salt Cay

The rehabilitation of salt marshes in Grand Turk and Salt Cay in collaboration with the TCI Heritage Trust (Agency under the TCI Ministry of Tourism) is a crucial action for preserving and promoting the cultural and environmental heritage of the Turks and Caicos Islands. Salt marshes are an essential part of the coastal ecosystem, providing habitat for many species of plants and animals. They also have significant cultural and historical significance, as salt production has been an important economic activity in the region for centuries.

The rehabilitation of salt marshes involves restoring degraded salt marsh areas to their natural state. This can be achieved through a range of activities, such as removing invasive species, planting native vegetation, and creating drainage channels. The rehabilitation process helps to improve the ecological functioning of salt marshes and restore their habitat value.

In addition to ecological benefits, the rehabilitation of salt marshes can also provide opportunities for cultural and educational activities. For example, the creation of an interpretation centre can help to educate visitors about the cultural and historical significance of salt production in the region. This can include exhibits, interactive displays, and guided tours that showcase the history and traditions of salt production.

The rehabilitation of salt marshes can also include the creation of facilities that support cultural and environmental activities. For example, the construction of observation decks and bird-watching areas can provide opportunities for visitors to observe the diverse flora and fauna of the salt marsh ecosystem (e.g. pink flamingos). These facilities can also support the development of eco-tourism, which can provide new economic opportunities for the region.

[PILLAR 3] COMPETITIVENESS

3.1 Strategic Line: Promoting innovation in the tourism industry.

3.1.1 Output: Innovation in tourism services and facilities

Based on the diversification of the tourism products (see Output 1.2.1), TCIG should promote investments to facilitate innovation of tourism services and facilities. Specific activities are as follows:

3.1.1.1 Specific Action: Diversification and innovation of tourism services

To diversify the tourism supply chain and to attract new market segments, a series of new services should be set up or re-designed to attract the typologies of tourists related to the new and priority tourism products.

New tourism products also require the set-up and diversification of new, specific, and innovative services connected to the new products.

Services connected to LUXURY:

Yacht rentals

Facilitate the settlement in Turks & Caicos of at least one company renting a superyacht (from 24 to 40 metres) and, possibly, also at least one megayacht (from 40 metres – 130 ft).

The number of “normal” yachts (10 to 24 metres) should be increased.

Services connected to OUTDOOR ADVENTURE:

Open Air Recreational Vehicles

If a sort of Florida Keys Road connection will be realised between Providenciales and North Caicos, this would open a market connected to open air-related Recreational Vehicles (RV), such as Truck Campers and Motorhomes would be possible to be developed.

This market potential would increase with a multiplier effect if Middle Caicos were connected by road to East Caicos.

Services connected to ECOTOURISM:

East Caicos

The not inhabited East Caicos offers a high potential for becoming a **unique climate neutral / zero-impact ecotourism destination** through a series of interventions:

- Map, signalise and systemise the old railroads’ trail, or at least a part of it, to create opportunities for hiking/trekking (only with expert guides).
- Valorise the over 1000s wild donkeys.
- Set up watching towers and other hidden watch points to get close to flamingos and other unique birds: Cuban crows, West Indian whistling ducks, Bahamas woodstar hummingbirds, warblers, mangrove cuckoos, several types of herons and egrets, and ospreys)
- Train guides to organise exploration tours to encounter reptiles and snakes (land wildlife watching)
- Organise sea wildlife watching: whales, dolphins, sting and eagle rays, starfishes.

- East Caicos' Unique Selling Position as a unique climate neutral / zero impact ecotourism destination through:
 - Energy & waste passive cottages (zero impact)
 - Specialised ecotourism guides
 - Hybrid or full electric motors driven boat connections (from Middle and South Caicos)

Salt Cay

Salt Cay is generally ready to become a real ecotourism and Community Based Tourism (CBT) destination, as many services are already organised. It should focus on positioning and branding itself as an ecotourism paradise. Possibly it should attract investments for developments related to Glamping typologies of accommodation structures.

Services connected to FISHING:

South Caicos

Investment in boats suitable for comfortable deep-sea fishing is required.

Services connected to UNDERWATER WONDER:

Except for Providenciales which offers quite innovative services to explore the underwater world beyond scuba diving and snorkelling, such as snuba, freediving and paddleboarding / SUPing, the other islands are not equipped to offer these innovative services.

Especially Grand Turk, South Caicos and Salt Cay should develop these services and, possibly, create new ones to explore the magic of the underwater world, also for people with low or no skills to do scuba diving or snorkelling, e.g.:

Seawalking:

Sea walking is a new way to explore the sea with little to no experience spending time under the sea.

The concept allows for walking on the seafloor while feeling relaxed and at ease with the surroundings, as breathing is normal.

This also allows those who are not certified to scuba dive to have a similar experience of



seeing the ocean from below. Adventurers get to wear a helmet that is fed fresh air from the surface so they can be anxiety free as they explore the beautiful marine life around them.

Sea walking has some technical aspects, including equalising, as one must do in scuba diving. The good part is that since one is wearing a helmet and no messy snorkel gear, one can still wear eyeglasses and breathe normally like they would above water. And those who can't swim don't even need to, since they're walking.

Submersible rides:

Various destinations have adopted innovative submarine rides. Some submarines go completely underwater, while others go half in, half out, to bring tourists close to marine life in the wild in the most comfortable manner possible.

An interesting, good example is the Triton DeepView 24, built by Florida-based luxury submersible company Triton Submarines, launched at the Vinpearl complex in Hon Tre Island, Vietnam, in 2022:

Measuring 15.4 meters (50.5 feet) long, the Triton DeepView 24 is described as "virtually silent, entirely non-polluting and producing no carbon or effluent emissions." The 24-seat vessel, which can reach depths of up to 100 meters (328 feet), features a transparent acrylic hull, providing an incomparable underwater experience for those on board. Passengers can view shipwrecks, reefs, and marine life, as well as a diver show devised to raise awareness around environmental issues during the 30-minute dives⁴¹.



Services connected to SALT-BASED CULTURE:

Salt Cay, Grand Turk

2. Relaunch the salt industry as an economic activity and a tourism attraction, including new services such as wellness.

Services connected to FILM COMMISSION:

The main initial ten steps to set up a "TCI Film Commission" are:

Phase 1: Short-Term Implementation

- Set up the "TCI Film Commission" division in the new DMO: hire specialised staff (2 people), and determine operating policies as its main functions are the "one-stop-shop" and marketing for attracting productions.
- Develop a Brand for Film Turks & Caicos. To reasonably compete, and to access a percentage of this multi-billion-dollar global industry, the Turks and Caicos needs to establish an impactful and memorable brand for the Turks and Caicos Film Commission and to leverage it through a multi-pronged marketing strategy to attract productions:
 - Possible brand Name: name Film Turks & Caicos / Film TCI or other
 - Logo and Brand Identity: clean, professional, memorable, and convey some information about the Turks and Caicos that would be attractive to the target markets.
- Develop brand Marketing Tools:
 - Website and Digital Film Commission Platform containing information and resources that must be available online for potential clients to access at any time:

⁴¹ <https://edition.cnn.com/travel/article/transparent-tourist-submarine-launches-at-vietnam-resort/index.html>

- Locations Photo Library
- Production Directory
- Production Guide
- Visa and Work Permit Guidelines and Applications
- Customs clearances
- Business and Services Directory
- Film Permit details and Application
- Social media platforms, banners, etc.
- Commission the development of Film Commission software for company operations (MovieSite or ReelScout).
- Compile production incentives package based on existing offers and concessions within the legislation, and add waivers for customs fees and work permit fees, for 1 - 3 years. Develop digital film permit.
- Compile local stakeholder database.
- Compile locations database.
- Develop TCI Film Production Partnerships:
 - Compile special service offers for film, television and commercial productions from hotels, airlines, restaurants, water sports, etc., especially by working with TCIHTA.
 - Bring together the members of the network and formalise partnerships with MOUs.
- Develop initial marketing and advertising plan to launch Film TCI in international target markets (New York, London, Los Angeles, Cannes), and locally in TCI, in partnership with TCI International Film Festival.
- Plan and execute local and international launch activities and advertising plans for Film Commission TCI, according to the initial launch marketing plan.

This first phase represents a testing phase with a moderate financial effort for its development and needs to be accurately assessed in terms of successes, challenges, and lessons of Phase 1. In fact, Relevant adjustments need to be made before embarking on Phase 2 and Phase 3, which are more demanding.

3.1.1.2 Specific Action: Product innovation addressing new typologies of accommodation.

→ **N.B. For details on new typologies of accommodation, please refer to ANNEX G**

To diversify the tourism supply chain and to attract new market segments, such as outdoor adventure and ecotourism, one or more islands of the Turks and Caicos should start developing and setting up new typologies of accommodation in line with the needs and expectations of the typical tourists of these segments, especially focusing on glamping style accommodation solutions.

Glamping is where glamorous accommodation meets traditional camping. Glamping offers accommodations and facilities that are luxurious compared to camping, to give travellers the best of both worlds.

According to Tents Xpert, the glamping market in the United States is expected to reach a revenue of about \$1 billion by 2024. And there's no sign of slowing down. According to Grand View Research, the glamping industry is projected to surpass \$5.4 billion by 2028 evidencing that the global glamping market size is huge.

This impressive growth is fuelled by travellers' desire to stay in unique accommodations, while still having access to amenities and services that are not necessarily provided by a traditional camping business.

Glamping is *not only limited to tents and caravans*: from treehouses to tiny houses, various types of accommodation are also regarded as glamping. The following are some of the most common:

a) Yurts ⁴²	b) Tipis ⁴³
c) Treehouses	d) Tiny houses
e) Bubble domes ⁴⁴	f) Luxury glamping tents
g) Eco-lodges	h) Train carriages
i) Caravans	j) Eco-Pods

Examples of Glamping



3.1.2 Output: Innovative start-up programme

3.1.2.1 Specific Action: Support technological start-ups for innovation in the tourism industry

This specific action to encourage the development and implementation of innovative technologies that can improve the tourism industry's efficiency and sustainability. This involves identifying and supporting technological start-ups developing innovative solutions for the tourism industry, such as mobile applications, e-commerce platforms, and data analytics tools.

By supporting technological start-ups, TCI decision-makers can leverage the creativity and innovation of the start-up community to identify and develop new solutions for the tourism industry. These solutions can help improve tourism operations' efficiency and effectiveness, increase customer satisfaction, and promote sustainable tourism practices.

Some ways that decision-makers can support technological start-ups include providing funding and mentorship, offering access to data and research resources, and facilitating collaboration between start-ups and established tourism operators. By providing these forms of support, decision-makers can help to overcome the challenges that start-ups often face, such as limited resources and a lack of industry connections.

⁴² A round glamping tent.

⁴³ Traditional, triangular native American tent.

⁴⁴ Transparent pods.

3.1.2.2 Specific Action: Annual Smart Tourism Hackathon (within the Caribbean Smart Tourism Conference)

Organising an Annual Smart Tourism Hackathon as part of the Caribbean Smart Tourism Conference would represent an important event for promoting innovation and creativity in the tourism industry. By bringing together technology enthusiasts and experts in the tourism industry, the hackathon provides a platform for developing new and innovative solutions that can improve the customer experience, promote sustainable tourism practices, and enhance the competitiveness of the tourism industry. Additionally, the hackathon provides networking and collaboration opportunities among participants and industry stakeholders, which can lead to further development and implementation of the winning solutions.

During the hackathon, participants are challenged to develop technology-based solutions that address specific challenges facing the tourism industry, such as improving the customer experience, promoting sustainable tourism practices, and enhancing tourism operations. Participants work in teams to develop prototypes and pitch their ideas to a panel of judges, who evaluate the solutions based on their innovation, feasibility, and potential impact on the tourism industry.

The hackathon typically runs for a day or two, when participants have access to technology resources, mentorship, and industry experts who can provide guidance and support. The event concludes with a presentation of the winning solutions, which are typically recognised with prizes and opportunities for further development and implementation.

3.2 Strategic Line: Tourism Market Intelligence.

3.2.1 Output: Profiling of tourist markets and segments

3.2.1.1 Specific Action: Organisation of a Tourism Observatory

Organising a Tourism Observatory for TCI is important for informing decision-making, monitoring tourism performance, identifying opportunities and challenges, promoting sustainable tourism, and supporting industry development. By collecting and analysing data on tourism trends and visitor behaviour, decision-makers can make informed decisions that support the long-term sustainability and growth of the tourism industry.

Here are some of the key steps involved in setting up the TCI Tourism Observatory:

- Define the objectives and scope of the observatory. This involves determining what information the observatory will collect and analyse, who the target audience will be, and what the expected outcomes are.
- Identify stakeholders who will be involved in the observatory, such as tourism operators, government agencies, academic institutions, and industry associations. These stakeholders can provide valuable input on the design and implementation of the observatory.
- Determine the data sources that will be used to collect the information needed for the observatory. This can include surveys, interviews, and data from tourism operators, government agencies, and other sources.
- Design data collection tools that are tailored to the objectives of the observatory. This can include survey questionnaires, interview guides, and data collection forms.

- Develop a data analysis plan: Develop a data analysis plan that outlines how the data collected will be analysed and presented. This should include a clear methodology for analysing the data and generating reports.
- Build the infrastructure needed to collect, store, and analyse data. This can include software tools for data analysis, data storage systems, and staff to manage the data.
- Train staff on data collection and analysis techniques, as well as the objectives and scope of the observatory.
- Launch the observatory and begin collecting and analysing data. Regular reports should be generated and distributed to stakeholders to inform decision-making and policy development.

3.2.1.2 **Specific Action: Assessment of new tourism markets and segments**

Assessing new tourism markets and segments through market intelligence is a critical action for tourism operators and decision-makers. By gathering and analysing data on tourism trends, consumer behaviour, and market conditions, it is possible to identify new opportunities for growth and development in the tourism industry. By developing marketing strategies that are tailored to the identified new tourism markets and segments, decision-makers can effectively target new customers and increase the competitiveness of the tourism industry.

- [Conduct Market Research to Learn More About Potential Tourists from Established Markets Based on New Tourism Products](#)
Market research is essential for understanding the needs and preferences of potential tourists from established markets, such as the US, Canada, and the UK. By studying and analysing data on new tourism products launched and promoted in these markets, tourism businesses and policymakers in TCI can gain insights into the motivations and interests of potential tourists.
- [Conduct Market Research to Learn More About Potential Tourists from Emerging Markets Based on New and Established Tourism Products](#)
To tap into potential markets, such as Japan, Germany, France, and Russia, tourism businesses and policymakers in TCI need to understand the unique needs and preferences of potential tourists from these areas. Conducting market research on both established and new tourism products can provide valuable insights into the motivations and interests of potential tourists from these markets.
- [Learn from Competitors and Best Practice Cases Through Market Intelligence](#)
Studying competitors, and best practice cases is essential for tourism businesses and policymakers in TCI if they want to stay ahead of the curve. Market intelligence can provide valuable insights into the strategies and tactics used by competitors the best practices in the tourism industry. By learning from competitors and best practice cases, tourism operators can identify opportunities for improvement and innovation and develop strategies to enhance their competitiveness in the market.

3.2.2 **Output: Innovation in tourism data collection**

Innovation in tourism data collection is an important area for tourism operators and decision-makers who want to improve the accuracy and efficiency of their data collection efforts. By leveraging new technologies and analytical tools, it is possible to gain valuable insights into tourist behaviour and preferences, as well as identify new opportunities for growth and development in the tourism industry.

Here are some of the ways innovation is being used to enhance tourism data collection:

- **Mobile data collection** by using mobile devices, such as smartphones and tablets, to collect data in real time. This approach can improve the accuracy and efficiency of data collection, as well as enable data to be collected in remote or hard-to-reach locations.
- **Sensor-based data collection** by using sensors, such as GPS devices and motion sensors, to collect data on tourist behaviour and movement patterns. This approach can provide valuable insights into the preferences and behaviour of tourists, as well as enable real-time monitoring of tourist activity.
- **Social media data collection** by analysing data from social media platforms, such as Twitter and Instagram, to gain insights into tourist behaviour and preferences. This approach can provide valuable insights into the opinions and perceptions of tourists, as well as enable real-time monitoring of trends and events.
- **Big data analytics** by using advanced analytical tools and techniques to analyse large volumes of data. This approach can provide valuable insights into complex patterns and relationships within tourism data, as well as enable real-time monitoring and decision-making.
- **Machine learning** by using algorithms and statistical models to analyse data and make predictions. This approach can enable tourism operators and decision-makers to identify patterns and trends within data, as well as predict future outcomes and behaviour.

3.2.2.1 Specific Action: Agreements with international tourism digital platforms.

Agreements with international tourism digital platforms offer significant advantages for tourism businesses and destinations in TCI. They can enhance visibility, as these platforms usually have a broad user base and can increase exposure to various potential customers. They can also increase bookings through their integrated booking systems, which makes it easy for customers to book travel and accommodation, resulting in increased sales and revenue. Additionally, these platforms have advanced marketing and advertising capabilities that can improve targeting and increase brand awareness. Moreover, these agreements provide access to valuable data and analytics that can help analyse customer behaviour, identify trends, and make informed decisions about marketing and operations. Overall, these agreements can boost competitiveness and support long-term growth and development in the tourism industry.

3.2.2.2 Specific Action: Promoting the digitalisation of the tourism industry.

Promoting digitalisation in the tourism industry is essential for remaining competitive and meeting modern travellers' needs and expectations. By enhancing digital infrastructure, developing digital marketing strategies, adopting digital payment systems, integrating smart technologies, and providing digital training and support, tourism businesses and destinations in TCI can ensure long-term success in the tourism industry.

3.2.3 Output: Interinstitutional collaboration

Interinstitutional collaboration is crucial for tourism development, as it enables different government agencies and stakeholders to work together towards a common goal.

Following are some ways to promote interinstitutional collaboration in tourism development:

3.2.3.1 Specific Action: Organisation of a permanent inter-ministerial roundtable.

One way to promote interinstitutional collaboration is to establish a permanent inter-ministerial roundtable. This can bring together representatives from different government agencies and stakeholders to discuss issues related to tourism development, share information, and coordinate efforts.

3.2.3.2 Specific Action: Developing joint tourism policies and strategies.

Interinstitutional collaboration can also involve developing joint tourism policies and strategies. By working together, different government agencies and stakeholders can align their efforts and resources towards a common vision for tourism development.

3.2.3.3 Specific Action: Sharing resources and expertise.

Interinstitutional collaboration can also involve sharing resources and expertise. This can include sharing data, knowledge, and best practices to improve decision-making and enhance the effectiveness of tourism development efforts.

3.2.3.4 Specific Action: Coordinating tourism development projects.

Interinstitutional collaboration can also involve coordinating tourism development projects. This can help to ensure that resources are used effectively and that different projects are aligned towards a common goal.

3.3 Strategic Line: Branding and Marketing.

3.3.1 Output: New branding and positioning

3.3.1.1 Specific Action: Conceptualisation and design of a new tourism brand

The conceptualisation and design of a new tourism brand for Turks and Caicos can help to enhance the destination's reputation and attract new visitors. Starting from the existing "Beautiful by Nature" brand, here are some examples of how to develop a new tourism brand for TCI focusing on new products in addition to the pristine beaches and crystal-clear waters, which are already excellently positioned in the international markets, such as culture, outdoor adventure, nature and wildlife:

- Unique Selling Point: Rich culture and history.
Brand Promise: *"Discover the soul of Turks and Caicos, where the past meets the present, and the local culture shines."*
- Visual Identity: A logo that incorporates elements of local art and architecture, along with vibrant colours and patterns.
- Messaging Strategy: A public relations campaign that highlights the destination's rich cultural heritage, featuring interviews with local artists, musicians, and historians.
- Unique Selling Point: Adventure and outdoor activities.
- Brand Promise: *"Unleash your inner explorer in Turks and Caicos, where every adventure is a memory to cherish."*
- Visual Identity: A logo that incorporates imagery of adventure and exploration, such as a compass or a mountain peak.
- Messaging Strategy: A digital advertising campaign that promotes the destination's outdoor activities, such as snorkelling, scuba diving, and hiking, featuring high-energy videos and photos.
- Unique Selling Point: Nature and Wildlife.
- Brand Promise: *"Experience the untamed beauty of Turks and Caicos, where nature and wildlife thrive in perfect harmony."*
- Visual Identity: A logo that incorporates imagery of the natural surroundings, such as palm trees, tropical birds, or marine animals, along with earthy tones and textures.
- Messaging Strategy: A content marketing campaign that highlights the destination's natural attractions, such as the protected marine reserves, the nature trails, and the birdwatching opportunities. The campaign could feature blog posts, social media content, and video content that showcases the natural

beauty and diversity of the destination. Additionally, the messaging could emphasise the destination's commitment to sustainability and responsible tourism, which would appeal to travellers who are interested in eco-friendly travel.

Once the new tourism product-related brand(s) has been developed, they should be implemented across all touchpoints, including marketing materials, signage, and digital platforms. This will help to create a consistent and cohesive brand experience for visitors.

3.3.2 Output: New branding and positioning

3.3.1.2 Specific Action: Digital Marketing Plan

→ **N.B. For more details, please refer to ANNEX H**

To improve the TCI digital presence and make the destination grow, and based on our analysis of the current activities conducted by the tourist boards, the following 5-year digital marketing strategy & plan has been designed. This plan is structured around five goals that lead global digital activities and ensure consistent and efficient actions.

1. Improve the quality of the user's experience and of the information available online:

- redesigning the website with improved content and fluid navigation,
- enriching website pages and social media with detailed descriptions about experiences in the TCI,
- writing and sharing at least 500 blog posts over the next five years.

2. Raise awareness about the destination:

- doubling the number of followers on social media accounts,
- increasing website visits by 100%,
- generating qualitative content to be massively shared with travellers (i.e. YouTube videos, Instagram Reels)

3. Facilitate bookings and highlight local providers efficiently:

- creating a booking system on the TCI website,
- having local stakeholders involved through fee participation,
- providing informational content on the tourist board's digital platforms for travellers to use

4. Create a link with tourists (potential, current and past) and build a strong community:

- increasing social media community with qualitative leads and committed followers,
- enhancing interaction with travellers,
- federating travellers around the tourist board, "TCI Beautiful by Nature"

5. Increase word-of-mouth and a good after-trip process:

- **Create** a post-trip survey to keep track of customers satisfaction,
- reaching 90% of travellers' satisfaction,
- inspire travellers to create social media posts with a hashtag specific to the tourist board (#BeautifulByNature).

3.3.3 Output: Traditional Promotion

Traditional tourism promotion actions are those that have been used for years to attract tourists to a destination. Although these traditional promotion actions can be effective, innovation and creativity are necessary to stay competitive and attract new visitors. The use of technology, personalization, collaborations,

sustainability, and experiential marketing can help tourism destinations stand out and create unique and memorable experiences for tourists.

3.3.3.1 Specific Action: Printed material

Brochures, flyers, and advertisements in travel magazines and newspapers can be effective in promoting a destination to potential tourists.

3.3.3.2 Specific Action: Television and Radio

Commercials on local and national television and radio stations can reach a broad audience and create awareness about the destination.

3.3.3.3 Specific Action: Trade Shows and Exhibitions

Attending travel and tourism trade shows and exhibitions is an effective way to network and promote the destination to travel agents and other tourism professionals.

3.3.3.4 Specific Action: Public Relations

Building relationships with journalists and media outlets can result in positive coverage and exposure for the destination.

3.3.3.5 Specific Action: Direct Mail

Mailing promotional materials, such as postcards or brochures, to potential tourists can be a cost-effective way to reach a targeted audience.

3.3.3.6 Specific Action: Tourist Information Centres

Tourist information centres can provide information and assistance to visitors, as well as promote local attractions and businesses.

3.4 Strategic Line: Distribution channels.

3.4.1 Output: Strengthening distribution channels in the marketplace

Strengthening distribution channels is crucial for businesses in the tourism industry to reach their target market, increase revenue, and reduce risk. By utilising OTAs, and social media platforms, building relationships with travel agents and wholesalers, and investing in technology, businesses can expand their distribution channels and grow their business.

3.4.1.1 Specific Action: Design of new tourism circuits and packaged holiday proposals

Designing new tourism circuits in Turks and Caicos, which involve creating fresh travel routes and itineraries that highlight the unique features and attractions of various destinations, can help in generating new packaged holiday proposals. This process involves identifying and mapping out key points of tourist interest, designing transportation routes, selecting suitable accommodation options, and developing effective marketing materials to promote the new circuit to potential visitors.

The primary objective of designing new tourism circuits is to diversify the range of experiences on offer in Turks and Caicos and encourage tourists to explore different islands in the country. Currently, there is a lack of packaged holiday offerings for TCI that are available through online channels for direct purchase by

consumers (B2C) or through intermediaries such as tour operators, online travel agencies (OTA), and business-to-business (B2B) channels.

Designing new tourism circuits presents an opportunity to address this gap and expand the range of options available to visitors planning their trips to Turks and Caicos. This can be achieved through the creation of customized packaged proposals for both Business-To-Business, B2B and Business-to-Consumer/B2C markets.

For B2B markets, packaged proposals should include special rack rates and packages for corporate retreats, team-building events, and conferences.

For B2C markets, packaged proposals could include pre-designed travel packages that cater to specific interests and demographics, such as adventure travel, wellness travel, or family travel. Additionally, proposals could incorporate unique and authentic experiences that are not easily accessible to independent travellers, such as local food tours, cultural events, or outdoor activities.

3.4.1.2 Specific Action: Organisation of educational and familiarisation trips

The organisation of familiarization (FAM) Trips in Turks & Caicos will provide an opportunity for travel agents and tour operators to visit the country and experience its attractions and amenities first-hand.

3.4.1.3 Specific Action: Organisation of the first International Luxury Caribbean Travel Fair

Organising a potential Caribbean luxury tourism trade fair and show in Turks and Caicos serves as a valuable platform for industry stakeholders to network, showcase their offerings, share knowledge, and promote their destinations, ultimately contributing to the growth and development of the luxury tourism sector.

3.4.1.4 Specific Action: Re-enforce cooperation with organised tourism intermediation channels.

Re-enforce cooperation with organised tourism intermediation channels: Tour Operators, Online Travel Agencies / OTA, etc., through direct contacts, participation in tourism trade workshops, etc.

3.5 Strategic Line: Enhancement and development of tourist MSMEs.

3.5.1 Output: Supporting development of new tourism businesses in emerging destinations

The government structure of TCI should promote the establishment and growth of high-quality micro and small enterprises in the emerging islands beyond Providenciales and Grand Turk. To support the birth and sustainability of businesses in a competitive system, principles of networking must be developed, and financial assistance should be provided to invest in infrastructure, machinery, equipment, and digital technology.

By encouraging the growth of micro and small enterprises in emerging islands, the TCI government can stimulate economic development and create new job opportunities in underdeveloped areas. Networking principles can facilitate cooperation between businesses, allowing them to leverage each other's strengths and resources. Additionally, financial assistance can provide the necessary resources for businesses to invest in infrastructure, equipment, and technology, improving their productivity and competitiveness.

3.5.1.1 Specific Action: Special fund for tourism MSMEs development

The establishment of a special fund to support the development of tourism MSMEs can provide a range of benefits to these businesses and contribute to the growth and sustainability of the tourism industry. By providing financing, capacity building, marketing and promotion, infrastructure development, and support

for innovation, MSMEs can become more competitive and contribute to the overall success of the tourism sector.

The fund should especially support the tourism SMMEs to overcome their often limited commercialisation capacity through the assistance to MSMEs to develop e-commercialization tools, and shared digital commercialisation platforms; by organizing and facilitating their participation in tourism fairs, workshops, educational tours, etc.

3.5.1.2 Specific Action: “Innovation Reward” Programme.

The "Innovation Reward" Programme encourages private sector investments in the TCI tourism industry by providing incentives for innovative ideas and developments throughout the archipelago. The programme aims to stimulate new investments in the tourism sector, which can create new job opportunities, diversify the economy, and enhance the overall visitor experience.

The "Innovation Reward" Programme will be designed to provide financial support and other incentives to private sector investors who introduce new ideas, technologies, and approaches to the tourism industry in TCI. This could include investments in new tourism products, services, or infrastructure and innovations in marketing, branding, and customer engagement.

The programme will be open to local and international investors and will prioritise projects aligned with the TCI's sustainable tourism development goals. Successful applicants will receive financial assistance and other support, such as business mentoring and network access, to help them launch their projects and achieve their business objectives.

3.6 Strategic Line: Quality development of tourism services.

3.6.1 Output: Extension to the tourism certification to all tourism businesses in TCI

3.6.1.1 Strategic Action: Quality Assurance Programme implemented by the Department of Tourism Regulations

The strategic line for developing high-quality tourism services in TCI aims to enhance the overall visitor experience by ensuring that all tourism businesses meet industry-specific quality standards. Extending tourism certification to all tourism businesses is critical to achieving this goal.

By implementing a Quality Assurance Programme, the Department of Tourism Regulations can ensure that all tourism businesses maintain the high-quality standards set by the industry. This programme can consist of developing specific guidelines and standards, conducting regular inspections and audits, and providing training and support to businesses for improving their quality standards.

Extending tourism certification to all tourism businesses can bring numerous benefits to the tourism industry, businesses, and customers. Firstly, certification ensures that businesses meet quality standards and follow industry best practices, enhancing the tourism industry's overall reputation and making it more appealing to travellers seeking high-quality experiences. Secondly, certification can differentiate businesses from competitors and increase their customer base. Thirdly, certification can provide businesses with access to resources, training and support that can improve their operations and profitability in the long term. Lastly, certification can improve customer satisfaction by ensuring that businesses meet or exceed their expectations.

3.7 Strategic Line: Skills and Competences.

3.7.1 Output: Developing skills and competencies of tourism businesses and local population about the tourism industry

3.7.1.1 Specific Action: Training Programmes

To achieve an adequate level of quality and to create well-managed business related to the new products, accommodation, and services, it is necessary to set up a system of training courses. The courses should represent a must for start-ups and a commitment to updating those who are already in the business.

Launch of education and vocational training Programmes

Launch of education and vocational training Programmes for accommodation, TOs, HORECA, special interest services, and others: e.g., in ecotourism, outdoor and adventure tourism, nature hiking, etc..

English for new foreign workers

Launch English-focused training programmes for target seasonal migrant workers (who often do not know English, being Spanish-speaking, Creole, etc.).

Capacity Building Training Programmes

The market intelligence operated by the DMO, the new tourism products, new services, and more in general, the new development strategy, must be accompanied by support, knowledge, and policies by the public administrators to be successful. This activity should include training sections for all public officers working at the Ministry of Tourism and other TCI Ministries and Authorities linked to the tourism ecosystem in the country.

3.7.1.2 Specific Action: Technical assistance and mentoring for tourism SMMEs.

This specific action aims to provide technical assistance and mentoring to tourism SMMEs to help them establish and grow their businesses in the tourism industry. This assistance can include support for business planning, financial management, marketing, and other essential skills needed for success in the tourism sector.

Providing technical assistance and mentoring to tourism SMMEs can also have a positive impact on the local economy by creating new job opportunities and generating income for local communities. By developing the skills and competencies of the local population, this action can help to build a sustainable tourism industry that benefits everyone involved.

3.7.2 Output: Tourism as a driving force for the development of other economic sectors

3.7.2.1 Specific Action: Tourism Integration Initiative.

To achieve in using tourism as a driving force for the development of other economic sectors in TCI, a Tourism Integration Initiative will be implemented, similar to Jamaica's "Tourism Linkages Program." This initiative aims to link the tourism economy with other sectors, such as handicrafts, agriculture, and manufacturing, to create new economic opportunities and diversify the local economy.

This initiative encourages tourism businesses to source goods and services locally, creating a demand for local products and services. This can stimulate growth in other sectors of the economy, which can lead to job creation and income generation for local communities.

Moreover, this initiative can promote the preservation of local culture and traditions by encouraging the use of locally made products in the tourism industry. This can enhance the visitor experience by offering authentic and unique products and experiences, while also supporting local businesses and communities.

11 Summary of the Action Plan and timing

Pillars, Strategic Lines, Outputs and Specific Action of the Action Plan

PILLARS	STRATEGIC LINES	OUTPUTS	SPECIFIC ACTIONS
1. Inclusive Growth	1.1 Clusterisation	1.1.1 Tourism Improvement Districts	1.1.1.1 Organisation of permanent local committees
	1.2 Tourism Product Specialisation	1.2.1 Specialisation by TIDs	1.2.1.1 Organisation of the new tourism product portfolio
	1.3 Connectivity between destinations	1.3.1 Enhancement of internal mobility	1.3.1.1 Development of the airport infrastructures
2.1 Supporting Sustainable Tourism Development			2.1.1 Supporting responsible tourism
2. Sustainability	2.2 Environmental Protection and Climate Change Mitigation	2.2.1 Investment in green technologies	2.2.1.1 Develop initiatives and measures to encourage investments in green technologies
			2.2.1.2 Training and support of start-ups in the field of green technologies
		2.2.2 Increase environmental protection and climate change resilience	2.2.2.1 Development of a "green infrastructure" programme applied to tourism industry
			2.2.2.2 Implement short-term initiatives to mitigate the effects of the rise of sea level and floods
			2.2.2.3 Create a circular economy programme applied to big cultural and sport events
			2.2.2.4 Short-term initiatives to mitigate the effects of hurricanes
			2.2.2.5 Programme guaranteeing of good quality water and secure water supply
			2.2.2.6 Programme to combat the reduction of marine natural resources and coral reef
	2.2.2.7 Programme to combat environmental problems		
	2.2.2.8 Programme to introduce sustainability standards		
	2.3 Heritage Valorisation	2.3.1 Support local culture, traditions and customs	2.3.1.1 Interpretation and documentation (Natural and Cultural Heritage assets)
2.3.1.2 Promotion of new gastronomic events			
2.3.1.3 Involvement of Local Communities			
2.3.2 Rehabilitation of natural and cultural heritage sites	2.3.2.1 Rehabilitation of the salt marshes in Grand Turk and Salt Cay		

PILLARS	STRATEGIC LINES	OUTPUTS	SPECIFIC ACTIONS
3. Competitiveness	3.1 Promoting innovation in the tourism sector	3.1.1 Innovation in tourism services and facilities	3.1.1.1 Diversification and innovation of tourism services
			3.1.1.2 Product innovation addressing new typologies of accommodation
		3.1.2 Innovative Start-ups Programme	3.1.2.1 Support technological start-ups for innovation in the tourism industry
			3.1.2.2 Annual Smart Tourism Hackathon (within the <i>Caribbean Smart Tourism Conference</i>)
	3.2 Tourism Market Intelligence	3.2.1 Profiling tourism markets and segments	3.2.1.1 Organisation of a Tourism Observatory
			3.2.1.2 Assessment of new tourism markets and segments
		3.2.2 Innovation in data-collection	3.2.2.1 Agreements with international tourism digital platforms
			3.2.2.2 Promoting digitalisation of tourism industry
		3.2.3 Interinstitutional collaboration	3.2.3.1 Organisation of a permanent inter-ministerial roundtable
			3.2.3.2 Developing joint tourism policies and strategies
	3.3 Branding & Marketing	3.3.1 New branding and positioning	3.3.1.1 Conceptualisation and design of a new tourism brand
		3.3.2 Digital Marketing	3.3.2.1 Digital Marketing Plan
		3.3.3 Traditional promotion	3.3.3.1 Printed material
			3.3.3.2 Television and Radio
			3.3.3.3 Trade Shows and Exhibitions
			3.3.3.4 Public Relations
			3.3.3.5 Direct Mailing
			3.3.3.6 Tourist Information Centres
	3.4 Distribution (sales) channels	3.4.1 Strengthening distribution (sale) channels in the marketplace	3.4.1.1 Design of new tourism circuits and packaged holidays proposals
			3.4.1.2 Organisation of educational and familiarisation trips
3.4.1.3 Organisation of the first International Luxury Caribbean Travel Fair			
3.4.1.4 Re-enforce cooperation with organised tourism intermediation channels			
3.5 Enhancement and development of tourist MSMEs	3.5.1 Supporting development of new tourism businesses in the emerging destinations	3.5.1.1 Special fund for tourism MSMEs development	
		3.5.1.2 “Innovation Reward” Programme	
3.6 Quality Development of Tourism Services	3.6.1 Extension of the tourism certification to all tourism businesses in TCI	3.6.1.1 Quality Assurance Programme implemented by the DTR (Ministry of Tourism)	
3.7 Skills and Competences	3.7.1 Developing skills and competences in the tourism industry	3.7.1.1 Training program	
		3.7.1.2 Technical assistance and mentoring for tourism SMMEs	
	3.7.2 Tourism as driving force	3.7.2.1 Tourism Integration Initiative	

Timing

OUTPUTS	SPECIFIC ACTIONS	2023	2024		2025		2026		2027		2028	
		2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half
1.1.1 Tourism Improvement Districts	1.1.1.1 Organisation of permanent local committees											
1.2.1 Specialisation by TIDs	1.2.1.1 Organisation of the new tourism product portfolio											
1.3.1 Enhancement of internal mobility	1.3.1.1 Development of the airport infrastructures											
	1.3.1.2 Incentives for developing new sustainable means of transportation											
2.1.1 Supporting responsible tourism	2.1.1.1 Creation of a tourism Destination Enhancement Fund											
	2.1.1.2 Awareness campaign to tourists and local population about responsible tourism practices											
2.2.1 Investment in green technologies	2.2.1.1 Develop initiatives and measures to encourage investments in green technologies											
	2.2.1.2 Training and support of start-ups in the field of green technologies											
2.2.2 Increase environmental protection and climate change resilience	2.2.2.1 Development of a "green infrastructure" programme applied to tourism industry											
	2.2.2.2 Implement short-term initiatives to mitigate the effects of the rise of sea level and floods											
	2.2.2.3 Create a circular economy programme applied to big cultural and sport events											
	2.2.2.4 Short-term initiatives to mitigate the effects of hurricanes											
	2.2.2.5 Programme guaranteeing of good quality water and secure water supply											
	2.2.2.6 Programme to combat the reduction of marine natural resources and coral reef											
	2.2.2.7 Programme to combat environmental problems											
	2.2.2.8 Programme to introduce sustainability standards											

OUTPUTS	SPECIFIC ACTIONS	2023	2024		2025		2026		2027		2028	
		2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half
2.3.1 Support local culture, traditions and customs	2.3.1.1 Interpretation and documentation (Natural and Cultural Heritage assets)											
	2.3.1.2 Promotion of new gastronomic events											
	2.3.1.3 Involvement of Local Communities											
2.3.2 Rehabilitation of natural and cultural heritage sites	2.3.2.1 Rehabilitation of the salt marshes in Grand Turk and Salt Cay											
3.1.1 Innovation in tourism services and facilities	3.1.1.1 Diversification and innovation in tourism services											
	3.1.1.2 Product innovation addressing new typologies of accommodation											
3.1.2 Innovative Start-ups Program	3.1.2.1 Support technological start-ups for innovation in the tourism industry											
	3.1.2.2 Annual Smart Tourism Hackathon (within the <i>Caribbean Smart Tourism Conference</i>)											
3.2.1 Profiling tourism markets and segments	3.2.1.1 Organisation of a Tourism Observatory											
	3.2.1.2 Assessment of new tourism markets and segments											
3.2.2 Innovation in data-collection	3.2.2.1 Agreements with international tourism digital platforms											
	3.2.2.2 Promoting digitalisation of tourism industry											
3.2.3 Interinstitutional collaboration	3.2.3.1 Organisation of a permanent inter-ministerial roundtable											
	3.2.3.2 Developing joint tourism policies and strategies											
	3.2.3.3 Sharing resources and expertise											
	3.2.3.4 Coordinating tourism development projects											
3.3.1 New branding and positioning	3.3.1.1 Conceptualisation and design of a new tourism brand											
3.3.2 Digital Marketing	3.3.2.1 Digital Marketing Plan											

OUTPUTS	SPECIFIC ACTIONS	2023	2024		2025		2026		2027		2028	
		2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half
3.3.3 Traditional promotion	3.3.3.1 Printed material											
	3.3.3.2 Television and Radio											
	3.3.3.3 Trade Shows and Exhibitions											
	3.3.3.4 Public Relations											
	3.3.3.5 Direct Mailing											
	3.3.3.6 Tourist Information Centres											
3.4.1 Strengthening distribution (sale) channels in the marketplace	3.4.1.1 Design of new tourism circuits and packaged holidays proposals											
	3.4.1.2 Organisation of educational and familiarisation trips											
	3.4.1.3 Organisation of the first International Luxury Caribbean Travel Fair											
	3.4.1.4 Re-enforce cooperation with organised tourism intermediation channels											
3.5.1 Supporting development of new tourism businesses in the emerging destinations	3.5.1.1 Special fund for tourism MSMEs development											
	3.5.1.2 “Innovation Reward” Programme											
3.6.1 Extension of the tourism certification to all tourism businesses in TCI	3.6.1.1 Quality Assurance Programme implemented by the DTR (Ministry of Tourism)											
3.7.1 Developing skills and competences	3.7.1.1 Training program											
	3.7.1.2 Technical assistance and mentoring for tourism SMMEs											
3.7.2 Tourism as driving force	3.7.2.1 Tourism Integration Initiative											

12 Impact of tourism growth on the labour market and migration

If tourism continues to grow, this will also impact the labour market which in TCI is heavily dependent on migrant workers, mainly from Haiti, Dominican Republic, and Venezuela.

A planned increase should be accompanied by policies for migrant workers, regarding:

1) Housing (e.g.,⁴⁵):

- Offer workers assistance in finding housing in the local market, or where this is not feasible, offer employer accommodation.
- Commit to the provision of accommodation that adheres to the UN's seven principles of adequate housing as a requirement for all employees and subcontractor employees.
- Limit the number of workers in a room, and ensure sufficiently proper, and well-maintained water, sanitation, and cooking facilities.
- Ensure sleeping quarters are air-conditioned and well-ventilated.
- Ensure that workers have access to leisure activities.
- Ensure that adequate and decent housing does not cost the worker more than a reasonable proportion of income.

2) Health care and/or insurance

3) Temporary work visa programmes

This would also reduce illegal immigration.

4) Social protection.

Extension of social protection to migrant workers and their families in fields such as education.

⁴⁵ Institute for Human Rights and Business. <https://www.ihrb.org/>

13 Final recommendations

To diversify its tourism offerings and ensure sustainable growth, TCI needs to take a comprehensive approach that engages multiple stakeholders in environmental protection, climate change mitigation, and cultural heritage valorisation. The following recommendations can be implemented to achieve these goals:

- Develop a public-private transport system to cover specific lines and networks, engaging both public and private transport providers to create a cohesive and efficient system.
- Encourage investment in green technologies by offering fiscal advantages and supporting start-ups in green technologies, specifically for large hospitality companies.
- Valorise local culture, traditions, and customs through shows, socialisation moments, and other events to attract different types of visitors and promote cultural exchange while preserving the islands' unique identity.
- Launch a "green infrastructure" program to promote sustainable tourism and implement short-term initiatives to mitigate the effects of sea level rise, floods, hurricanes, and water salinisation.
- Re-enforce the image of TCI as a safe and secure tourist destination by creating tourist police units that can help and protect visitors.
- Develop Tourism Improvement Districts (TIDs) characterised by specific integrated tourism offers managed collaboratively by a board of representatives from private and public stakeholders.
- Clusterisation by a grouping of islands can enhance the tourism industry by leveraging the strengths of each island and creating a more diverse and attractive tourism product.
- Set up new typologies of accommodation, such as glamping, and enhance glamping style developments through a Glamping Programme to facilitate private entrepreneurs to invest in glamping types of accommodation.
- Invest in market intelligence to gain insights into potential tourists from consolidated and new markets.
- Create a 5-year digital marketing plan to improve its digital presence, raise awareness about the destination, facilitate bookings and create a strong community, increase word-of-mouth, and ensure a good after-trip process.
- Develop packaged proposals for both B2B and B2C and strengthen cooperation with organised tourism intermediation channels like tour operators, online travel agencies, etc.
- Focus on infrastructure development, including completing the ports and airports of the minor islands, developing internet infrastructure and creating awareness programs for the local population.
- Encourage the start-up and reinforcement of good quality level community micro and small enterprises in all the islands beyond Providenciales and provide financial aid and ongoing technical assistance and mentoring.
- Launch education and vocational training programs for accommodation, tour operators, HORECA, special interest services, and others, and launch training programs focusing on English for tourists. Capacity-

building programs should also be launched for public administrators working directly or indirectly with tourism.

By taking a comprehensive approach to sustainability, engaging multiple stakeholders, and implementing these recommendations, TCI can become a sustainable and attractive destination for tourists, while also ensuring the conservation of its natural, cultural, and social environment.



D16

Annex A

National tourism strategy and implementation plan for Turks & Caicos

Annex A – Current Tourism Demand

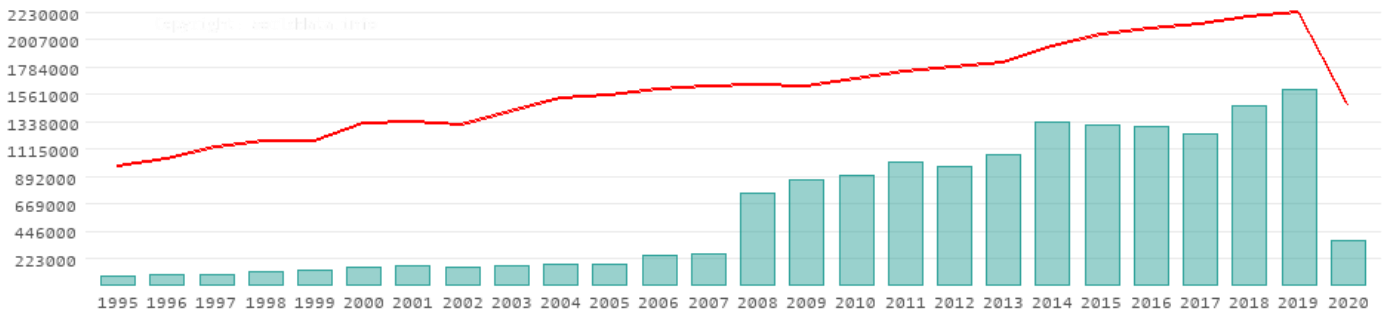
March 2023

Annex A: CURRENT TOURISM DEMAND

Development of the tourism sector on the Turks and Caicos Islands from 1995 to 2020¹

- The following chart, elaborated by World Data², shows the number of tourist arrivals registered on the Turks and Caicos Islands each year³.

Figure 1: Development of the tourism sector on the Turks and Caicos Islands from 1995 to 2020

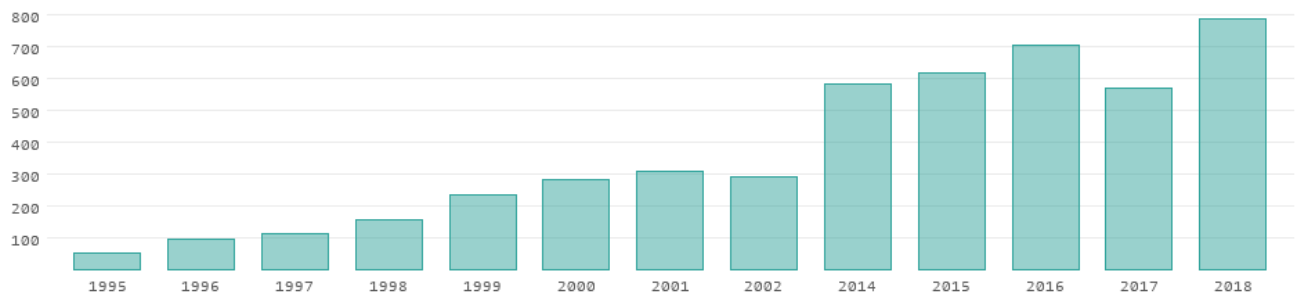


The red line represents the average of all 21 countries in Caribbean.

Revenues from tourism

- In 2001, according to the report of World Data⁴, tourism revenues amounted to 311.00 million USD, or about 86.69 percent of the gross national product. This corresponded to about 166,000 tourists at that time and roughly 1,873 USD per person. Within 17 years, the country's dependence on tourism has decreased noticeably. Before the outbreak of the COVID-19 pandemic, sales were \$787.00 million billion, 70.70 percent of gross national product. Thus, each visitor spent an average of \$538 on their vacation on the Turks and Caicos Islands.

Figure 2: Revenues from tourism sector in TCI from 1995 to 2018⁵



¹ <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

² <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

³ Anyone who spends at least one night in the country but does not live there for more than 12 months is considered a tourist. Insofar as the survey included the purpose of the trip, business trips and other non-tourism travel purposes were excluded. The number of people passing through within the same day, and e.g., crew members of ships or flights are also not considered tourists. If the same person travels in and out more than once within the same year, each visit counts again.

⁴ <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

⁵ <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

Table 1: All data for the Turks and Caicos Islands in detail⁶

Year	Number of tourists	Receipts	% of GNP	Receipts per tourist
2020	370.400			
2019	1.60 m			
2018	1.46 m	787.00 m \$	70.70 %	538 \$
2017	1.24 m	571.00 m \$	55.85 %	459 \$
2016	1.30 m	706.00 m \$	68.38 %	545 \$
2015	1.32 m	619.00 m \$	65.71 %	470 \$
2014	1.33 m	584.00 m \$	69.44 %	439 \$
2013	1.07 m			
2012	968,000			
2011	1.01 m			
2010	899,000			
2009	865,000			
2008	757,000			
2007	265,000			
2006	248,000			
2005	176,000			
2004	173,000			
2003	164,000			
2002	155,000	292.00 m \$	79.63 %	1,884 \$
2001	166,000	311.00 m \$	86.69 %	1,873 \$
2000	152,000	285.00 m \$		1,875 \$
1999	121,000	238.00 m \$		1,967 \$
1998	111,000	157.00 m \$		1,414 \$
1997	93,000	113.00 m \$		1,215 \$
1996	88,000	99.00 m \$		1,125 \$
1995	79,000	53.00 m \$		671 \$

- These data on tourist numbers, revenues and expenditures are based on information from the World Tourism Organization. However, to ensure international comparability, the data for some years or countries were manually researched and corrected if they obviously included visitors without overnight stays. In these cases, the data were taken from the official communications of the respective national tourism authorities.
- The World Tourism Organization additionally points out that in some countries, the number of tourists is only counted at airports, while in others they are also counted at border crossings or even hotels. A comprehensive and reliable indication is therefore hardly possible in any country.

TCI leads world in travel demand -TripAdvisor reports⁷

- The Turks and Caicos Islands continues to lead the Caribbean in tourists' arrivals, and now the world, with TripAdvisor predicting a prosperous fall season for the territory.

⁶ <https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php>

⁷ <https://tcweeklynews.com/tci-leads-world-in-travel-demand-tripadvisor-reports-p12680-127.htm>

Annex A: Current Tourism Demand

- According to the travel giant's 2022 fall travel index, released in August 2022, TCI continues to be a hot spot for travellers and is the top overall trending destination for the fall worldwide.
- TripAdvisor's Fall Travel Index reveals nearly six out of ten Americans will travel this season despite ongoing inflation and rising fuel costs.
- While domestic travel is still preferred, more than 40% of Americans will travel long-haul this fall.
- "Of the locations which have seen the biggest year-on-year increase in searches on TripAdvisor by Americans for travel this fall, the dreamy Caribbean destination Turks and Caicos is at number one," the Index outlines.
- The travel giant reported that the TCI has seen the fastest growing demand based on year over year growth compared to the fall of 2021.
- That is a strong sign, given the territory's already-outstanding performance last year at this time.
- TCI beat out traditionally leading global destinations such as Ho Chi Min City, Singapore, London, Bangkok, Italy, The Netherlands, among others.
- In the top 15 worldwide destinations ranked, TCI was the only Caribbean destination that made the TripAdvisor list.
- The report was based on a TripAdvisor Consumer Sentiment Survey, which drew data from an online survey of over 2,700 consumers, in partnership with Qualtrics, conducted between July 6, 2022 through July 22, 2022 across six countries - US, UK, Australia, Italy, Singapore and Japan.
- The travel site also looked at site behavioural data sourced from first party traffic data on the TripAdvisor platform, gathered during the week commencing July 4, 2022, for searches made by U.S. travellers from June 1, 2022 through June 30, 2022 for travel between September 1, 2022 through November 30, 2022.

Turks and Caicos Sees Major Increase in Visitor Arrivals⁸

- The Turks and Caicos Islands Tourist Board has announced that the destination has seen an upsurge in visitor arrivals. According to the preliminary figures released by the tourist board, Turks and Caicos has witnessed 138,762 air arrivals and 173,151 cruise arrivals in the first quarter of this year.
- "The tourism industry is poised for a full recovery," said Mary Lightbourne, acting director of tourism, Turks and Caicos Tourist Board. She added that the first quarter of 2022 has been particularly strong, year on year, in context to the destination recovering from the decline dealt to the sector by the COVID-19 pandemic over the past two years⁹.
- "We are indeed buoyed by these figures, in particular the month of March, which is critical to our sector," said Lightbourne. "The first quarter, especially March, is traditionally excellent for winter vacationers, and has seen a robust [change] in visitor arrivals, almost paralleling the corresponding month in 2019, which saw the best pre-COVID arrivals for the sector."
- The Turks and Caicos Islands saw an average increase of approximately 33 percent in stopover arrivals through the Providenciales International Airport and FBOs, increasing from the 34,057 stopover arrivals in

August 26, 2022

⁸ <https://www.travelagentcentral.com/destinations/turks-and-caicos-sees-major-increase-visitor-arrivals>

⁹ www.turksandcaicostourism.com

Annex A: Current Tourism Demand

January 2022 to 44,596 stopover arrivals in February 2022, and 60,109 in March 2022. The number of stopovers received in February this year was a substantial increase of 248 percent year on year. The destination received only 12,798 stopover arrivals in February 2021—a direct result of the COVID-19 pandemic and the restrictions implemented to contain its diffusion.

- When compared to February 2020 and 2019, both periods being pre-pandemic, arrivals plunged by 14 percent and surged by 7 percent respectively. The 138,762 stopovers received in the first three months of 2022 were 98 percent of the 140,791 stopovers received in the first three months of 2019. The U.S. market continues to dominate as the main source market claiming the majority of total visitor arrivals, January through March 2022.
- When the Turks and Caicos reopened its cruise sector in December 2021, there were a total of 25,573 arrivals. This was 21 percent of the 117,827 arrivals seen in 2019. The Turks and Caicos Islands then received 173,151 cruise visitors in the first quarter of 2022, which was 62 percent of the 277,280 cruise arrivals received in the first quarter of 2019. January welcomed 27 ships with 43,035 cruise visitors, whereas February received 24 ships and 50,148 cruise visitors, with March welcoming 28 ships and 79,968 cruise visitors.
- The U.S. Centers for Disease Control and Prevention lifted its advisory for cruise travel in March 2022 indicating that the public health measures in place on cruise ships are effective and will hopefully influencing more cruise visitors.

D16

Annex B



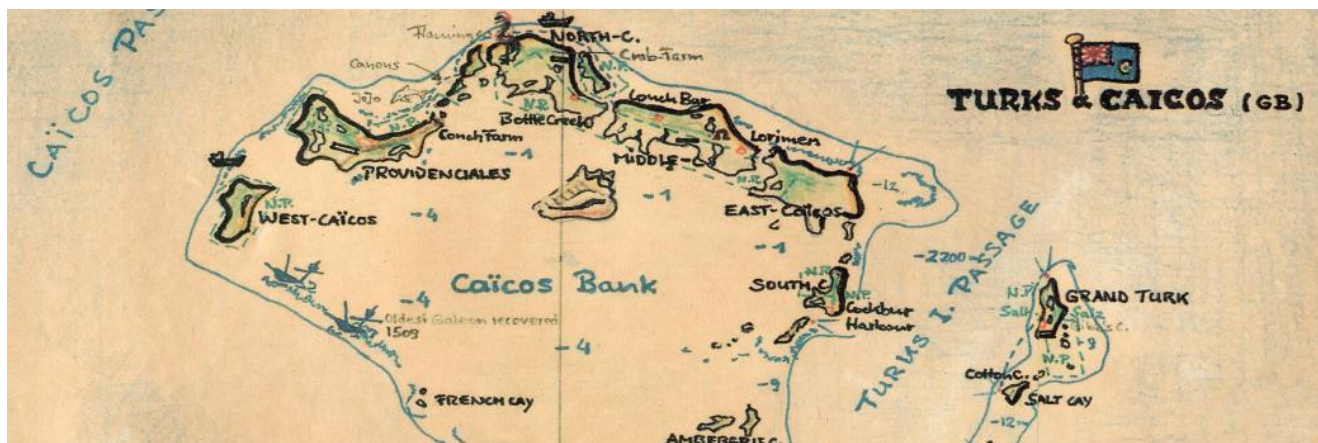
National tourism strategy and implementation plan for Turks & Caicos

Annex B – Main characteristics of 16 selected islands with current or potential
tourism arrivals

March 2023

CHARACTERISTICS OF 16 SELECTED ISLANDS AND CAYS WITH CURRENT AND POTENTIAL TOURISM ARRIVALS

Figure 1: Map of the Turks and Caicos Islands¹



1. Providenciales

Visited in May, June, July, August, and October 2022 by consultants of Target Euro

- Providenciales² / Provo is the main destination in TCI and represents more than 90% of total tourism in the country in terms of infrastructures / facilities and tourism demand /flows.
- The tourism development of Providenciales started in 1984 with the construction of the first resort on the island: Club Med. The real boom however occurred from the early 2000s.
- Chalksound: lagoon with many villas. Good spot for fly fishing. Nice beaches for water-based activities such as Kayak, Paddle Board, Canoe and Water Ball at Las Brisas at the Chalksound National Park and the Southside Silly Cay.
- The development of shanty towns³ is increasing at an alarming rate in the Turks and Caicos Islands. E.g., tucked away from one of the biggest hotels on Providenciales Island is "The Bight", a Haitian community shanty town built on the side of a small rocky hill.

¹ Copyright 1993 by Heinz Meder

² <https://www.visittci.com/providenciales>

³ Most shanty towns consist of structures that were not only illegally built but were constructed on land that does not belong to the squatters.



- Turtle Tail is a highly scenic residential area on the south coast of Providenciales with many opulent and expansive villas (hosting celebrities such as Rihanna). The beautiful hills and bluffs on this peninsula offer incredible views over the turquoise Caicos Banks and inland marine ponds. The artist Prince owned one of the largest mansions in the Turks and Caicos, complete with a purple

driveway.

- Wymara Villas Resort at the Bight Beach on the western side of Grace Bay.
- Luxury vacation villas can be seen across the 3-mile coast of Long Bay Beach (vacationing celebrities Nicki Minaj, Kylie Jenner, John Kerry, Kourtney & Khloe Kardashian).
- Upscale Leeward community is a residential area with many luxury villas (e.g., Hawksbill Villa which hosted P-Diddy and Drake) and luxury resorts (e.g., Blue Haven Resort, which hosted Beyoncé and Jay Z). And is home to the Blue Haven Marina, which is the marina and port of entry of choice for many cruising yachts and several local boat charter companies.
- Da Conch Shack in Blue Hills district is a very popular location for both islanders and tourists.
- 3 FBOs providing private jets in Provo: Blue Heron, Provo Air Centre, Business Aviation.
- Coco Bistro is the most popular gourmet / fine dining restaurant on the islands and requires table bookings months in advance.
- Besides Airbnb a popular site for renting houses in Turks & Caicos addressed to the US market, and especially in Providenciales, is VRBO <https://www.vrbo.com/?preferlocale=true>

2. West Caicos

- West Caicos⁴ Formerly known as Belle Island, is the last island in the Turks and Caicos archipelago to the west, and the second largest uninhabited island in the country. The island has a collective area of about eleven square miles, with generally flat terrain. The large West Caicos Marine National Park protects a large portion of the waters around the island.
- The west coast of the island offers miles of beautiful low iron shore cliffs, and the other sides make up about five miles of pristine beach. West Caicos currently has ruins from several centuries, along with the unfinished buildings of the Molasses Reef Resort project.

⁴ <https://www.visittci.com/west-caicos>

3. Mangrove Cay

- Mangrove Cay⁵ is a scenic mangrove island is the easiest to access wetland paddling spot on Providenciales. Largely due to its proximity to Providenciales, it is one of the most popular eco (glass bottom) kayaking and stand-up paddleboarding locations in the Turks and Caicos.

4. Little Water Cay (Iguana Island)

- An interesting of Little Water Cay⁶ attraction is the nature reserve of Little Water Cay, locally known as 'Iguana Island'. This small privately held island, or cay, is home to the few remaining Rock Iguanas that used to cover most of the islands in the Turks and Caicos.

5. Pine Cay

- Situated in the strings of cays between Providenciales and North Caicos, Pine Cay⁷ is privately-owned and has low-density residential development. The main feature of the cay is its spectacular two-mile long north coast beach, which ranks as one of the top beaches in the country. Pine Cay offers a very quiet and laid-back atmosphere.
- Today the island is home to the secluded Meridian Club resort and approximately forty private residences and vacation villas. The island has a no car policy, so electric golf carts and bicycles are the main means of transport.

6. Parrot Cay

- The 1000-acre Parrot Cay⁸ is found east of Providenciales. The island boasts spectacular beaches and luxury low-density development. Unlike the neighbouring Pine Cay, Parrot Cay does not have an airstrip, so visitors are ferried to the island by boat.
- The island is home to the COMO Parrot Cay Resort, luxury villas managed by the resort, and private residences. The resort also features Shambhala Retreat, the famous full-service spa and well-being centre.
- Celebrities' own homes or vacationed on this tranquil cay⁹.

⁵ <https://www.visittci.com/other-islands/mangrove-cay>

⁶ <https://www.visittci.com/other-islands/little-water-cay>

⁷ <https://www.visittci.com/pine-cay>

⁸ <https://www.visittci.com/parrot-cay>

⁹ List of celebrities that stayed at Parrot Cay:

Sofia Vergara, of sitcom Modern Family; Gwyneth Paltrow; Janet Jackson; Professional footballer Rio Ferdinand owns a villa on Parrot Cay; Liam Neeson and wife Natasha Richardson; Eva Longoria stayed on her honeymoon with Tony Parker; Howard Stern; English supermodel Cara Delevingne lists Parrot Cay as her favorite island in the world; Richard Gere; Gene Simmons (rock band Kiss) filmed part of a Family Jewels episode here; Justin Bieber stayed at Christie Brinkley's Lucky House; Cindy Crawford lists Parrot Cay Beach as her favorite beach; Demi Moore and Ashton Kutcher stayed at Bruce

7. North Caicos, &

8. Middle Caicos

Visited on May 3rd and on July 26th and 27th 2022

- North and Middle Caicos¹⁰, the so-called “twin islands” are agriculture areas with very limited tourism infrastructures and few tourists visiting them. They are the “Garden Islands” of the country, and the perfect escape for the adventurous traveller.
- North Caicos is quite a large island with extensive wetland systems, while Middle Caicos is the largest island in the Turks and Caicos. The two islands make up most of the land mass in the country, so the density of development is low with a total population less than 3,000.
- The idea of developing a highway connecting at first Providenciales with North & Middle Caicos, then Middle Caicos with East Caicos and, finally, East Caicos with South Caicos, following a Florida Keys-style development, is not well seen by most of the residents of these islands, fearing a development of these islands in line with the one of Providenciales, which they do not want and is very strongly opposed in North & Middle Caicos.
- North Caicos and Middle Caicos are an amazing destination for outdoor photography. There are countless beaches, great sunset locations, and lush landscapes that shelter wildlife. Culture and lifestyle photos can be great too, as the quiet life in the islands offer interesting settlements, friendly community, and small-scale farming.
- Target Euro visited the Point Lookout to get a glimpse of the hundreds of pink flamingos at the Caicos Pine Yard Trail.
- Target Euro visited and stayed overnight at the Dragon Cay Resort, one of the few resorts developed in Middle Caicos.

<https://www.dragoncayresort.com/> This resort however does not follow the Sun & Sea model of Grace Bay, and is much more relaxed, in an uncontaminated natural area.

From a geo-morphically point of view, this area is totally different from the sandy beaches’ landscape of Grace Bay in Provo: high limestone cliffs, sea caves, and turquoise hues of the breath-taking Mudjin Harbour is considered one of the finest landscapes in the Turks and Caicos.

- The long and empty road connecting the port of Bellefield Landing (a new terminal is in development) to the Causeway to Middle Caicos and Wild Cow Run Beach not far to the near East Caicos islands, offers the possibility to develop tourism products based on (electric assisted) bikers and motor bikers.

Willis’s villa; Actor Bruce Willis owned one of the more-luxurious villas on Parrot Cay for years; Rolling Stones guitarist Keith Richards owns a villa; Christie Brinkley owns a luxury villa, Lucky House; Former U.S. President Bill Clinton and wife Hillary Clinton stayed at Donna Karan’s private villa; Fashion designer Donna Karan has been a long-time property owner in Parrot Cay; Ben Affleck and Jennifer Garner were married on the exclusive Parrot Cay in 2005.

¹⁰ <https://www.visittci.com/north-caicos-middle-caicos>

9. East Caicos

Visited on July 28th, 2022

- East Caicos¹¹ is the largest uninhabited island in the Turks and Caicos and has an area of roughly 32 square miles. About half of East Caicos is flat saline tundra and mangrove marshes, with the remaining being the typical low dry brush common to the country. The island's north and east coasts are almost completely beach, collectively over ten miles (16 km). The southern half of the island is largely wetlands, swamp, and red mangroves.
- In the late 1880s, sisal growing was tried and became the largest export East Caicos ever saw. Sisal (in the past also called pita) is an agave plant that is grown for its very strong fibres that are used to produce rope and twine. Jacksonville was the social centre of East Caicos. Sisal processing stations, houses, a company store, and barracks capable of holding up to 400 people were all part of Jacksonville. Only a few ruins remain of this small settlement.
- An outstanding natural wildlife and natural setting is the Bay Cay Island, an uninhabited cay part of the East Bay Islands National Park¹²:
 - It is home to a significant portion of the endangered Turks and Caicos Islands *rock iguana's* collective population in the world.
 - The cay is also sanctuary for many types of birds, including Cuban crows, West Indian whistling ducks, Bahamas woodstar hummingbirds, warblers, mangrove cuckoos, several types of herons and egrets, and ospreys.
 - The cay also has large numbers of blue land crabs.
 - The shallows near the cays also support some of the densest seagrass beds in the country, and consequently queen conch, eagle rays, southern stingrays, starfish, and smaller molluscs.
- Opportunities for hiking / trekking (only with expert guides).

10. South Caicos

Visited on May 5th and July 28th, 2022

- South Caicos¹³ offers a unique Hemingwayesque experience for those who want to experience the Old Caribbean while it still exists. This quiet and laid-back island is supported by small-scale commercial fishing and boutique tourism.
- Only three resorts on the island.
- Water sports businesses are few.

¹¹ <https://www.visittci.com/east-caicos>

¹² <https://www.visittci.com/other-islands/bay-cay>

¹³ <https://www.visittci.com/south-caicos>

- The island is a deep-sea diving excellence due to the combination of the reef bordering with Columbus Passage (Atlantic Ocean). Jacques Mayol: The famous French diving legend and holder of many world records in free diving lived in Bell Sound, South Caicos.
- The Boiling Hole in the South Caicos Salina is an excellent location for birdwatching, in particular flamingos.
- The island has an outstanding lagoon called “Bell Sound” and hosts a luxury secluded retreat.
- The vicinity of both Middle Caicos and South Caicos from East Caicos (approx. 30 minutes by boat), causes the need to group North, Middle and South Caicos in one tourism area together with East Caicos.
- The idea of developing a highway connecting at first Providenciales with North & Middle Caicos, then Middle Caicos with East Caicos and, finally, East Caicos with South Caicos, following a Florida Keys-style development, is not well seen by most of the residents of these islands, fearing a development of these islands in line with the one of Providenciales, which they do not want and is strongly opposed also in South Caicos.

11. Big Ambergris Cay / Little Ambergris Cay

Visited on July 30th, 2022

- Ambergris Cay¹⁴ is an 1,100-acre private island. The island, together with its sister island Little Ambergris Cay, sits on the southeast corner of the string of Turks and Caicos Islands that surrounds the world-famous Caicos Banks.
- Ambergris Cay has been a private island since its purchase in 1811 and saw little development until the late 20th century when modern infrastructure was put in place, catering to an upscale clientele looking for privacy and rustic Caribbean charm.
- The island hosts three important resorts offering sun & beach luxury tourism, such as the Ambergris Cay Resort¹⁵.
- Ambergris Cay is a nature lover’s paradise. The island is home to the largest populations of Turks and Caicos Islands rock iguanas and the Turk’s Head cacti in the country: both of which are icons of local flora and fauna. There are also a significant number of two unique and tiny boas: the rainbow boa, and the Caicos boa, which is the world’s smallest constricting snake.

12. Seal Cays Wildlife Sanctuary

- The Seal Cays Wildlife Sanctuary is formed by a group of uninhabited cays and rocks:
 - ✓ Billy Beefer Rock. Total landmass is about 1.4 acres.

¹⁴ <https://www.visittci.com/ambergris-cay>

¹⁵ <https://www.visittci.com/ambergris-cay/ambergris-cay-resort>

- ✓ Bush Cay, with a collective area of approximately 19 acres (8 hectares)
- ✓ White Cay. Total landmass is a little over 12 acres.
- ✓ Indian Cay is a 13-acre uninhabited island.
- ✓ Middle Rock is a tiny island found halfway between Big Ambergris Cay and the Seal Cays Wildlife Sanctuary with a total landmass of 1.4 acres.
- ✓ The Three Brothers Rocks are three tiny ironshore rocks.
- ✓ Shot Cay is an uninhabited, tiny, and remote rock.
- ✓ Not to be confused with the larger Pear Cay found near Grand Turk, this tiny Pear Cay is little more than a limestone ironshore rock.
- ✓ The Seal Pup Cays are four limestone ironshore rocks found about 8 miles south of the Ambergris Cays.
- ✓ The Coral Cays are several small limestone rocks.
- ✓ Breaker Rock is as its name suggests is simply a jagged shard in the ocean.

13. Grand Turk

Visited on May 4th, and July 29th, 2022

- Grand Turk¹⁶ Is a small tropical island with a great selection of water sports, interesting historical sights, and exquisite beaches.
- Grand Turk is also a major cruise destination; in fact, the island is breaking visitor arrival numbers, with more than 170,000 visitors in the first quarter of 2022¹⁷. This proves once again the popularity of Grand Turk as a cruise destination. With the cruise lines now sailing at maximum vessel capacity, for the most part, the Caribbean islands are beginning to recover the losses they made over the last two years. It also means that numbers are beginning to resemble the record-visitor numbers of 2019.
- Grand Turk has business tourism (the capital of the country)
- Yellowman & Sons Auditorium / max. 500 people.
- Another smaller meeting facility / building next to it: “The Life”.

¹⁶ <https://www.visittci.com/grand-turk>

¹⁷ <https://www.cruisehive.com/grand-turk-received-over-170000-cruise-visitors-in-first-three-months-of-2022/72866>

A well-structured open air for events -sports, religious happenings, ceremonies - is represented by the facility named “The Parade Ground” under the management of the Sports Commission of Turks & Caicos.



Cruise Ships Terminal

- A large portion of cruisers, stay at the “Margaritaville” a sort of holiday village at the port. It offers shops (US brands), bars, live entertainment, a swimming pool.
- Of the cruisers that decide to visit the island, a significant portion rents a gold cart and go around without any specific direction (just going around). Another part of tourists goes around with tours organized by locals, who need to leave 50% of the cost of the excursion to Carnival.
- Main attraction for these tourists is the ancient Grand Turk Lighthouse. The only lighthouse in the country, it was prefabricated in England and built in 1852.
- Another attraction is represented by the many “wild” donkeys walking around the island.



14. Salt Cay

Visited on July 30th, 2022

- Salt Cay¹⁸ is the smallest of the inhabited islands in the Turks and Caicos. With an area of only 2.6 square miles (6.7 sq. km) and a population of only 108 people, this island has a completely different character and persona than Providenciales and the other islands in the country.
- Salt Cay is truly an example of an island time forgot. There’s simply none of the tourism development that define so many of the other Caribbean destinations. Day to day life is quiet, there are no paved roads and very few cars. The entire Salt Cay experience is unique: tranquillity is an attraction on Salt Cay, which is difficult to find elsewhere.
- Has a community-based tourism offered by its 100 inhabitants (to be verified).

¹⁸ <https://www.visittci.com/salt-cay>

- The most iconic of the Salt Cay structures, the White House was originally built in the late 1820s and was the centre of operations, salt storage and residence of the Harriot Family. Although the building still stands today and appears relatively sound, it's uninhabited and in need of repairs.

15. Cotton Cay

- Cotton Cay¹⁹ is an uninhabited 0.43 square-mile (1.12 sq. km) island, found 1.6 miles (2.6 km) northeast of Salt Cay and 3.6 miles (5.8 km) south of Grand Turk. The cay is generally of low elevation and has the low-density coastal vegetation typical to the Turks and Caicos.
- Cotton, and later sisal, were raised here and plantation ruins and field walls can be seen on the western half of the island. Uncommon on the main islands in the country, Turk's Head cactuses are well-established on Cotton Cay.

16. Big Sand Cay / Great Sand Cay

- The remote Big Sand Cay²⁰ (also known as Great Sand Cay) is a spectacular uninhabited island, and part of the Turks Island archipelago in the Turks and Caicos. The cay is located 7 miles (11.4 km) south of Salt Cay and has a collective area of about 125 acres (51 hectares).
- Big Sand Cay is an exceptional location for birdwatching, especially for the tern and noddy. The island also attracts numbers of nurse sharks in the summer months.
- The western side of Big Sand Cay features one of the finest beaches in the Turks and Caicos.
- As the island is rather long, the lee side is quite sheltered and is a favoured mooring location for cruising yachts.
- The eastern coast of Big Sand Cay is irregular, with small coves, dune bluffs, and several rocks off the coast.
- During calm conditions, exquisite and varied snorkelling can be found off the east side of the island. Underwater visibility is excellent, and the coves and gullies, with interspersed sand beds, are fascinating.

¹⁹ <https://www.visittci.com/other-islands/cotton-cay>

²⁰ <https://www.visittci.com/other-islands/big-sand-cay>



D16

Annex D

National tourism strategy and implementation plan for Turks & Caicos

Annex D – List of Interviewed Stakeholders

March 2023

Annex D: LIST OF INTERVIEWED STAKEHOLDERS

Besides the continuous interaction with members of the DMO Advisory Committee¹ set-up to design the national DMO, Target Euro's team has also met the following selected stakeholders in TCI. The aim of these interviewed was to collect their impressions, considerations, expectations and suggestions for the design of the TCI National Tourism Development Strategy. The stakeholders met during these field visits are as follows:

Name	Role	Island / Cay
Mr. Tueton Williams	Managing Director of Caicos Isles Management	North and Middle Caicos
Mr. Desmond Messick	Guide and owner of Island Tours	North and Middle Caicos
Mr. Brian Naqqi Manco	Caicos Pine Recovery Project Manager with the Department of Environment and Coastal Resources / DECR – operational branch of North & Middle Caicos	North and Middle Caicos
Mr. Norman Saunders	Owner of a seafood processing plant supplied by independent fishermen	South Caicos
Mr. Captain Tim Hamilton	Owner of T & V Tours	South Caicos
Mr. Vianel Filpo	General Manager at Ambergris Cay Private Island	Big Ambergris Cay / Little Ambergris Cay
Mrs. Katya Vieira	Owner of 3 apartments let (e.g., Manta House) and restaurant Sand Bar	Grand Turk
Mrs. Sharon Plasomour	Taxi driver and guide	Grand Turk
Mrs. Ti Ann	High school/college teacher	Grand Turk
Mr. Tom and Mrs. Ginny Allan	Managers of the Bohio Dive Resort (now closed). Now managing the Pillory Beach Club	Grand Turk
Mr. Eric Smith	Owner of Yellowman & Sons Auditorium / max. 500 people	Grand Turk
Mr. Edwin Dickinson	Owner of Olympic Construction Ltd.	Grand Turk

¹ Ms. Yvette Marcelin Lawyer; Mr. Caesar Campbell Chairman of the TCI Tourism Board; Hon. John Malcolm South Caicos Rep; Mr. Lloyd Stubbs Taxi association; Mr. Miquel Swann Premier's Office; Ms. Winema Sanders Penn National Trust; Mr. Godfrey Smith Airport Authority; Ms. Althea Been Airport Authority; Mr. Tervente Williams Local Hotelier; Mr. James McNally Developer; Mr. Trevor Musgrove President of TCHTA

D16 - National tourism strategy and implementation plan*Annex D – List of Interviewed Stakeholders*

Mr. Holden “Paulie” Dickinson	Around 90 years old, he is the living memory of the island. Has been working at the Morton Salt Company.	Salt Cay
Mrs. Debbie Manos	Ground handling for Caicos Express, grocery shop owner, accommodation intermediary	Salt Cay
Mr. Richard Agraba	Owner of Salt Cay Divers	Salt Cay
Mr. Allen Shine	Managing SALT CAY COMMUNITY FERRY connecting Salt Cay with Grand Turk	Salt Cay



D16

Annex C

National tourism strategy and implementation plan for Turks & Caicos

Annex C – Analysis of the Primary Tourism Services

March 2023

Annex C: ANALYSIS OF THE PRIMARY TOURISM SERVICES

Introduction

Primary tourism services such as transportation, accommodation and food & beverage are the most important aspects of a destination. Visitor satisfaction, the quality and quantity of services available and ease of access etc all contribute to tourists staying longer and spending more.

Following a short overview:¹

Transports

Getting to TCI

Nearly all visitors to the Turks and Caicos arrive by either plane to the island of Providenciales, or by cruise ship to the island of Grand Turk.

The Turks and Caicos is a very easy destination to visit for residents of the United States, United Kingdom, and Canada, as visas are not required for citizens or legal residents of these countries.

Arriving by plane

All scheduled international flights into the Turks and Caicos land at the Providenciales International Airport (PLS).

The Turks and Caicos welcomes arrivals with flights from over ten countries, including the United States, Canada, United Kingdom, the Bahamas, Dominican Republic, Haiti, Jamaica, Cuba, Antigua, Puerto Rico, and the British Virgin Islands.

Direct flights are offered from 11 North American cities, including Washington DC, New York, Miami, and Toronto.

For arrivals from other destinations, travellers will typically connect through a major United States east coast city such as Miami, New York, or Charlotte.

British Airways operates the only trans-Atlantic flights, with a Thursday and Sunday service from London Heathrow (LHW), which has a one-hour layover in Antigua. This was previously a stop via Nassau instead of Antigua.

Flights to neighbouring Caribbean countries have historically been expensive due to limited demand, yet prices have fallen in recent years and additional routes have been added. Frequent flights are now offered to the Bahamas, Haiti, and the Dominican Republic. For direct service between the Turks and Caicos and other

¹ Based on information from Visit TCI website <https://www.visittci.com/>

Caribbean and tropical Atlantic destinations, the only airlines that operate scheduled flights are Caicos Express, interCaribbean, and Bahamasair.



Arriving by Cruise Ship

Grand Turk is the only island in the country with a cruise ship port. All cruise ships to the Turks and Caicos arrive at this facility. All immigration and customs matters are handled by the cruise lines, so it's a breeze to land. Most stays average about six hours. Due to time constraints, it's not feasible to visit Providenciales or any of the other main islands in the country.



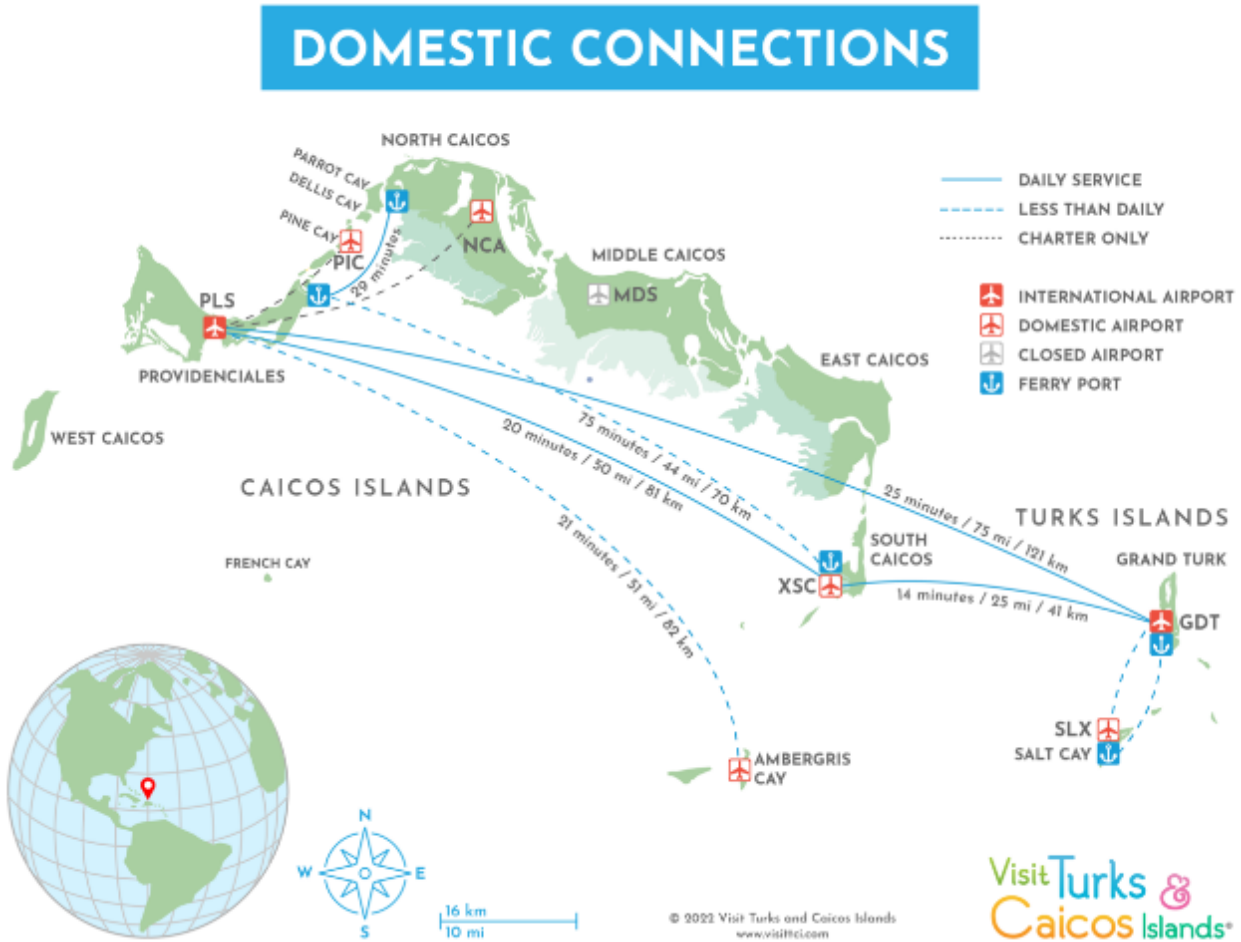
Arriving by Yacht

The initial stop for a yacht arriving in the TC islands, must be at a port-of-entry. There are several such marinas on Providenciales and Grand Turk, and one each on North Caicos and South Caicos. The harbourmaster at the port of entry has the authority to grant leave to enter for one week. If people wish to stay longer or cruise among the islands, he/she must get a Cruising Permit (valid for 90 days), and/or visit one of the immigration offices on Providenciales or Grand Turk.



Getting Around

The Turks and Caicos is an archipelago nation of nine inhabited islands and many smaller cays and islands, and small domestic flights and passenger ferries are the primary means of transport between islands.



Providenciales and Grand Turk host most of the country's population, and consequently flights and ferries largely function around these two hubs.

North Caicos and Middle Caicos are the only two islands in the country connected by a causeway.

Once on island, rental cars and vehicles, or taxis are the main means of getting around. There are no public transport, bus, or train services in the Turks and Caicos.

The domestic flights and ferries that connect the islands can offer quite an interesting ride, as a tourist gets an incredible view of the scenic cays and brilliant turquoise ocean water that makes the Turks and Caicos famous. The Providenciales—North Caicos ferry is one such example, as the route navigates the coastlines of the secluded Little Water Cay, Water Cay, Pine Cay, Fort George Cay, Dellis Cay and Parrot Cay.

There are no large car ferries in the Turks and Caicos.

Accommodation

TCI is home to an extensive selection of vacation accommodations, and each island offers a unique atmosphere and perspective. Providenciales features the large and full-service resorts and family-friendly hotels, Grand Turk offers quaint colonial inns, and the sparsely populated islands of North Caicos, Middle Caicos, and Salt Cay have small guest houses and boutique beach hotels that will appeal to those that appreciate nature and seclusion.

TCI accommodation system can be broken down into the following categories:

a) The condominium market.

The condominium hotels sector has led the development of tourism. Condominium hotels have not only helped TCI to build visitor numbers, but they have also helped TCI to develop a robust, domestic real estate market and repeat tourism.

Condos, either bought by people intending to live in them, use them as a vacation home or rent them out, have always been the backbone of the country's real estate sector. The islands see more than 300 days of sunshine each year; pristine beaches and warm water, coupled with the quiet of island life, have led many high-net-worth investors to buy property on the islands to live in, use as a vacation home or rent out to tourists. Demand for Turks and Caicos real estate remained higher than pre-pandemic levels, with a 71% increase in first-through-third quarter 2022 sales compared with the same period in 2019². Sales on the island boomed during Covid-19 as buyers, mainly from the US, flocked to the islands; 85% of real estate owners on the islands are from North America, according to Sotheby's.

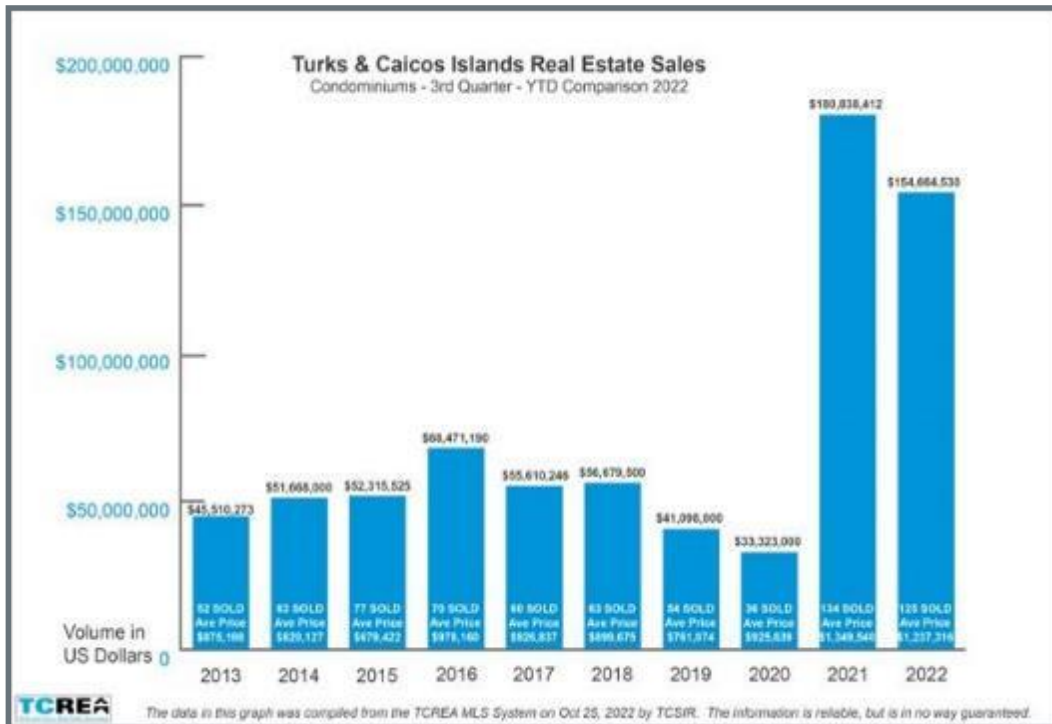
While single-family villas lead most sales throughout 2021, buyer interest has shifted to condominiums, according to the report. Condominium sales have increased 42.54% year-over-year, with the help of sales from luxury developments like the Rock House, and Ritz Carlton. Overall, sales were down 10.5 %, year-over-year with \$327,501,259 in total sales³.

Table condominiums - 3rd quarter 2022⁴

² <https://www.investmentmonitor.ai/sponsored/caribbean-real-estate-market-is-riding-the-high-tide>

³ <https://www.luxuryhomes.com/blog/2022/07/29/market-update-turks-caicos-q2-2022/>

⁴ TURKS & CAICOS REAL ESTATE MARKET REPORT - 3rd QUARTER COMPARISON 2022
<http://thefinestcollection.com/MarketReport/Oct2022.pdf>



Condominium sales in third quarter 2022 included mostly resale condominiums with the sales volume keeping up with 2021 sales and remaining well ahead of previous years. In the luxury end, an Estate at Grace Bay Club sold for list price at \$6.5M, a Ritz-Carlton Residence sold for \$6.3M, a penthouse at The Palms \$2.977M and two Shore Club condominiums.

b) Traditional “European Plan” (EP) hotels and resorts

Traditional “EP” hotels include regional hotel chains. In the last years the country attracted some international hotel brand names: Comfort Suites, Preferred Hotels & Resorts, Regent, and Sandals Resorts.

However, attracting other high-end international hotel brand names - such as Hyatt and Marriott - remains a strategic priority. Ritz-Carlton have also expressed interest in developing here.

Hotels and resorts provide most available rooms on the island of Providenciales, and these range from small boutique accommodations to expansive and luxurious resorts.

The other islands in the Turks and Caicos do feature resorts and hotels, however they are typically smaller establishments than those on Providenciales.

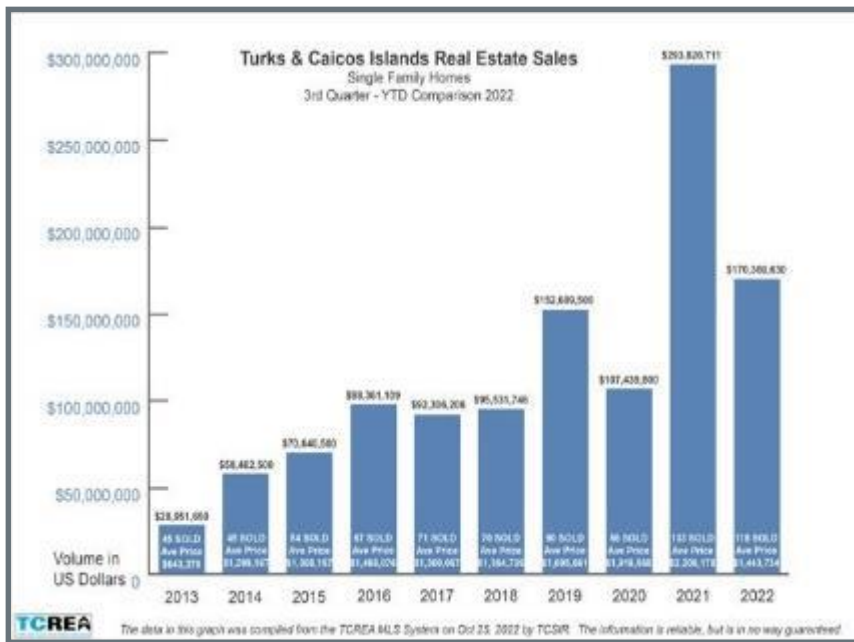
c) Private villas and homes rentals

The vacation villa rental category includes everything from luxury mansions to partitioned guest houses. These options are fully furnished (often with equipped kitchens), however, in most rentals other than the largest sites, they typically lack the room service and housekeeping that is the norm with luxury hotels and resorts. On the upside, there's usually more space and privacy.

Providenciales supports most vacation rentals, however, most of the accommodations on the islands other than Providenciales are some types of rental villa or guest house.

There are many and various current proposed inward investments, some very large in terms of the relative size of investment. The private villas home market is continuously growing.

Table Single Family Homes (SFH) – 3rd quarter 2022⁵



The SFH segment shows a healthy sales volume and average price compared with past years, with plenty of under construction villas as well as pending sales set to close out before the end of this year. Significant sales for the third quarter of 2022 included Wymara Villa 5105 \$5.05M, Long Bay Beach Villa \$4M and Sunset Beach Aqueous \$3M.

d) Second homes

including for foreigners avoiding northern winters.

e) Mixed condo/ EP hotels

Caicos was built largely on the condo/resort business model, which lends itself to a higher-level product. We have these amazing resorts that are built and centred around million-dollar-plus condos. This creates an environment of a very high-end luxury product.

Although the condos are individually owned, management companies - such as the Hartling Group⁶ - manage these assets for the condo owners while it also operates everything on the resort segment including hotel and grounds operations, food and beverage, spa, and retail.

⁵ TURKS & CAICOS REAL ESTATE MARKET REPORT - 3rd QUARTER COMPARISON 2022

<http://thefinestcollection.com/MarketReport/Oct2022.pdf>

⁶ https://www.leadersmag.com/issues/2019.1_Jan/PDFs/LEADERS-Karen-Whitt-The-Hartling-Group-The-Palms-Turks-Caicos.pdf

f) Timeshare

Fractional timeshare ownerships are discouraged and there are not many current operations.

g) All-Inclusive Resorts

There are nine all-inclusive resorts in the Turks and Caicos: five are found on Providenciales (fondly known as Provo), and the others are located on our smaller islands.

An all-inclusive resort typically includes dining, on-site activities, and other amenities with the room rate. Because of these extra perks, the all-inclusive room rate is often at least twice as much as a comparable room at a typical resort.

h) Bed and breakfast hotels

The high-end bed and breakfast category is also growing encouraged because of the potential great added value of this investment.

i) Homestay and Budget Lodging

The most-economic option are single rooms rented by the accommodation owner. Beachfront paradise can be expensive, and due to the small sizes of the islands in the Turks and Caicos, even the remote and inland accommodations aren't a far drive from the ocean.

j) Specialist hotels for divers, weddings, others

Many of the luxury resorts on Providenciales offer tailor-made wedding packages for couples and their guests, including services such as wedding planners, catering and wedding cakes, wedding photographers, flowers and décor, Marriage License & Legal Requirements management, Entertainment (DJ, Bands, Musicians)⁷.

The Turks and Caicos is renowned for miles of exquisite barrier reefs, walls, clear waters, and abundant wildlife. Building on this, in TCI specialist dive resorts have been opened such as the Ocean Club Resort, Beaches Turks & Caicos Resort, Ports of Call Resort (Providenciales), Bohio Dive Resort (now closed, Grand Turk), East Bay Resort, South Caicos Ocean & Beach Resort (South Caicos).

Table: Tourist Accommodation 2020⁸

	Hotels	Condo Hotels	Villas	Other	Rooms
Providenciales	11	29	269	9	4,114
Grand Turk	4	-	10	-	155

⁷ <https://www.visittci.com/weddings/legal-requirements>

⁸ <https://tourismanalytics.com/turks--caicos.html>

South Caicos	2	-	-	-	87
North Caicos	2	-	30	1	124
Middle Caicos	-	-	3	-	13
Parrot Cay	1	-	7	-	106
Ambergris Cay	1	-	-	-	10
Pine Cay	1	-	8	-	38
Total	22	29	327	10	4,647

The High and Low Seasons

There is an 'on-season' and 'off-season'. Prices are often at the highest between December-April. During the remainder of the year, hotels and resorts will often tempt guests with special package deals and such as free nights or reduced rates. The late summer hurricane season sees the fewest visitors.

Food & beverage

TCI is an excellent vacation destination for foodies, and an entire spectrum of cuisines and flavours can be found in its restaurants.

Providenciales is the undeniable centre of dining in the country, yet the smaller islands and cays each offer a unique perspective as well. The various islands in the Turks and Caicos differ greatly in restaurant and dining offerings.

Gourmet and Fine Dining

The dining situation in the Turks and Caicos has evolved quite a bit over the last few decades, and there's a wide selection of cuisines and elegant venues to choose from.

Providenciales supports a vibrant gourmet scene, with **over sixty restaurant options**. With the influx of luxury tourism, many restaurants have evolved a delicious fusion of international tastes and local seafood dishes.

A restaurant is nothing without a top chef, and many of the establishments on Providenciales are headed by internationally recognized and award-winning chefs.

For the traditionalists, authentic Japanese, Italian, French, Mediterranean, Moroccan, Thai, Indian, Jamaican and many other restaurants await as well.

Local Food Festivals

In recent years several food-oriented festivals have been started, such as the Conch Festival. These events offer a great opportunity to sample some of the local cuisine while also offer insight into the cultural history of the islands. Island Fish Fries are also common and are the local version of the backyard BBQ.

Private Chefs

Another great dining option when in the Turks and Caicos is hiring a private chef. Vacation villas and many of the larger resort and condominium suites feature full kitchens, and a chef can cook the cuisine that's desired, and is a perfect choice of special dietary or allergy considerations, or if there's a good catch from a fishing charter.

Catch Your Dinner

A great vacation experience is to go deep sea sport fishing, and have a local restaurant prepare the catch. Local fish includes yellowfin, bluefin and blackfin and skipjack tuna, mahi-mahi, wahoo, and mackerel.

Shopping

As a small country, the Turks and Caicos generally doesn't have the extensive shopping options that other major tourist destinations offer, yet there's still a great selection of unique treasures to discover.

Providenciales and Grand Turk feature the best collection of gift, art, boutique, and souvenir shops. Our smaller and less-populated islands do not have as wide an offering, but do have the essentials, groceries, and locally made arts and crafts.

Luxury and Duty-Free Shopping

Luxury items such as watches, jewellery, perfumes, and leather goods can be found on both Providenciales and Grand Turk, and duty-free goods are available at the Providenciales International Airport and the Grand Turk Cruise Center.

Duty-free products are imported into the Turks and Caicos customs tax-free and are offered to non-Turks and Caicos residents only.

Conchs and Seashells

A Queen Conch is one of the most popular local souvenirs to take back home, and these impressive shells can be found on many of our beaches and for sale at shops and markets.

There are some restrictions on quantity and procedures on exporting conch shells.

Art and Crafts

The art scene on Providenciales is quite varied. The many art galleries on Providenciales display a beautiful range of paintings, prints, sculptures, ceramics, crafts, fine art photographs, and more.

Handmade on the laid-back islands on North Caicos and Middle Caicos, the baskets, hats, model sailboats and dolls that are distributed by the Middle Caicos Co-op are authentically Turks and Caicos. Woven and carved from materials harvested locally, much of these items are made by the older members of society using techniques passed down through generations. The Co-op is an organization that represents over sixty such artisans.

Soaps, Cosmetics, and Skincare

Several of the boutiques in the Grace Bay region and at the upscale resorts stock a range of soaps and skincare products, including soaps that are handcrafted in the Turks and Caicos.

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Annex E



National tourism strategy and implementation plan for Turks & Caicos

Annex E – Assessment of the online positioning of TCI as tourism destination

March 2023

Annex E: ASSESSMENT OF THE ONLINE POSITIONING OF TCI AS TOURISM DESTINATION

1	Web-based research on keywords associated to Turks & Caicos.	3
2	Analysis of the current TCI Digital Marketing Strategy.	10
3	TCI social media-based Reputation Analysis.	21

1 Web-based research on keywords associated to Turks & Caicos.

Target Euro carried out web-based research focusing on the findings on the Google web browser (first page with references) concerning Turks & Caicos as tourism destination.

The following keywords and references resulted related to TCI on Google (web research on 04 Nov 22):

- turquoise waters
- white sand beaches
- Caribbean's best kept secret
- tropical archipelago
- British Overseas Territory
- pristine marine
- overseas territory of the United Kingdom in the West Indies
- bay
- cays
- resorts
- limited local medical care
- caution, crime

Fonts:

<https://turksandcaicostourism.com>

<https://en.wikipedia.org>

<https://www.visittci.com>

<https://www.gov.tc> (TCI government)

<https://www.britannica.com>

<https://www.beaches.com>

<https://en.wikivoyage.org>

<https://travel.state.gov> (US gov)

Analysis of tourism packages offered online.

To help in understanding how the destination Turks and Caicos is sold online and what kind of packages are available, TE carried out an analysis of the TCI tour packages that appear on the first page of the Google research browser, by using the keywords “**Turks and Caicos Tour packages**”.

In addition, the following keywords were verified:

- “Turks and Caicos Tour package”
- “Turks and Caicos” “Tour packages”
- “Turks and Caicos” “Tour package”
- "TCI" "Tour packages"

The following Google References (excluding announcements / ads) resulted on the **first page** of the Google browser On December 19th, 2022:

1. "Turks and Caicos Tour packages" = **0 references**
2. "Turks and Caicos Tour package" = **0 references**
3. "Turks and Caicos" "Tour packages" = **94,800 references.**

- 3.1. <https://www.travelsunit.com/turks-caicos.html>
- 3.2. <https://www.islandadventuretc.com/boat-tours-turks-and-caicos>
- 3.3. <https://bookmytour.world/itinerary/turks-and-caicos-islands-united-kingdom/>
- 3.4. <https://islandtempus.com/turks-caicos-islands-charter-tours/>
- 3.5. <https://www.anjmal.com/turks-and-caicos-holiday-tour-packages/>
- 3.6. <https://www.travelandleisure.com/travel-guide/turks-caicos>
- 3.7. <https://www.etravelconnect.com/sg/activities/turks-and-caicos-islands#!viator/activities/grand-turk-audio-tour/7715880>
- 3.8. <https://www.wetmoneyent.com/experiences>
- 3.9. <https://www.opulentroutes.com/turks-and-caicos-islands-shore-excursions/>

N.B. None of these web references relate to tour packages, but rather to excursions, day trips and boat-yacht rentals.

4. "Turks and Caicos" "Tour package" = **58,700 references.**

- 4.1. <https://www.tourradar.com/t/225197>
- 4.2. <https://www.antilogvacations.com/package?Packagetype=International&Destination=Turks%20and%20Caicos&Duration=1-30&PackageCost=5000-500000>
- 4.3. <https://www.visittci.com/providenciales/things-to-do/party-cruises>
- 4.4. <https://www.travellingexpo.ca/tour/caribbean-sunsets-turks-caicos-islands-to-jamaica>
- 4.5. <https://traveltriangle.com/tour-packages/caribbean>
- 4.6. <https://www.inspirock.com/turks-and-caicos/providenciales/island-vibes-tours-a479734679>
- 4.7. <https://www.indiamart.com/destination-travel-service/services.html>

5. "Turks and Caicos" "holiday package" = **26,700 references.**

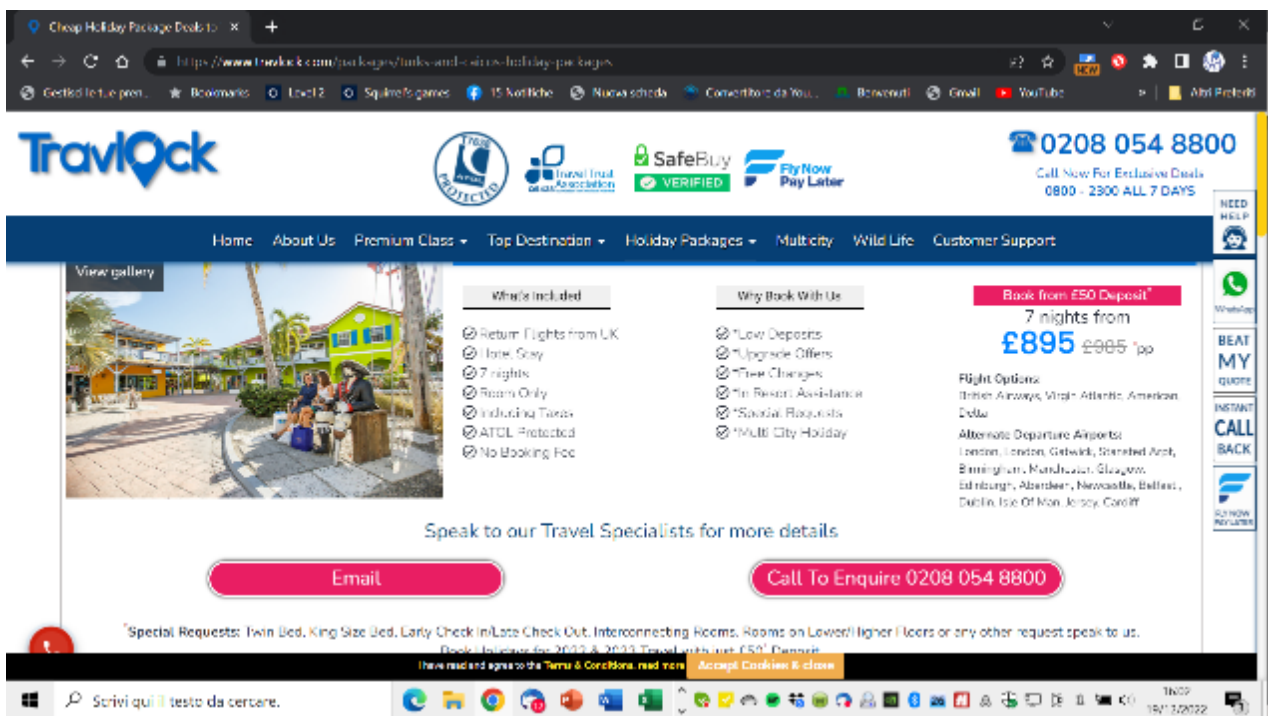
- 5.1. <https://www.expedia.co.uk/Turks-And-Caicos.d184.Holidays-City-Breaks>
- 5.2. <https://www.beaches.co.uk/turks-caicos/>
- 5.3. <https://www.lastminute.com.au/Turks-And-Caicos.d184.Destination-Travel-Guides>
- 5.4. <https://www.tripadvisor.in/Vacation-Packages-g147395-Turks-and-Caicos-Vacations.html>
- 5.5. <https://www.wotif.com/Turks-And-Caicos.d184.Destination-Travel-Guides>
- 5.6. <https://www.thompsons.co.za/our-destinations/caribbean/turks-caicos>
- 5.7. <https://www.clubmed.ch/d/the-caribbean/turks-caicos?locale=en-CH>
- 5.8. <https://www.britishairways.com/en-gb/destinations/hotel-information/Providenciales/Beaches-Turks-and-Caicos-Resort-Villages-and-Spa/TC-PLS-9468000>
- 5.9. <https://www.chartertravel.co.uk/holidays/caribbean/caribbean-itineraries/14-day-holiday-in-turks-caicos>
- 5.10. <https://www.travlock.com/packages/turks-and-caicos-holiday-packages>

At a first glance the web is not offering classical holiday packages flight + accommodation + transports.

This is a significant outcome of the Google research, as it means that almost the entire market is based on tourists looking autonomously for accommodation solutions in Turks and Caicos and consequently find the most suitable flight connections to reach the archipelago.

The only website found in the first page on Google browser appears to be the one of TravLock that offers some packaged travel combinations flight + accommodation for the UK market <https://www.travlock.com/packages/turks-and-caicos-holiday-packages>:

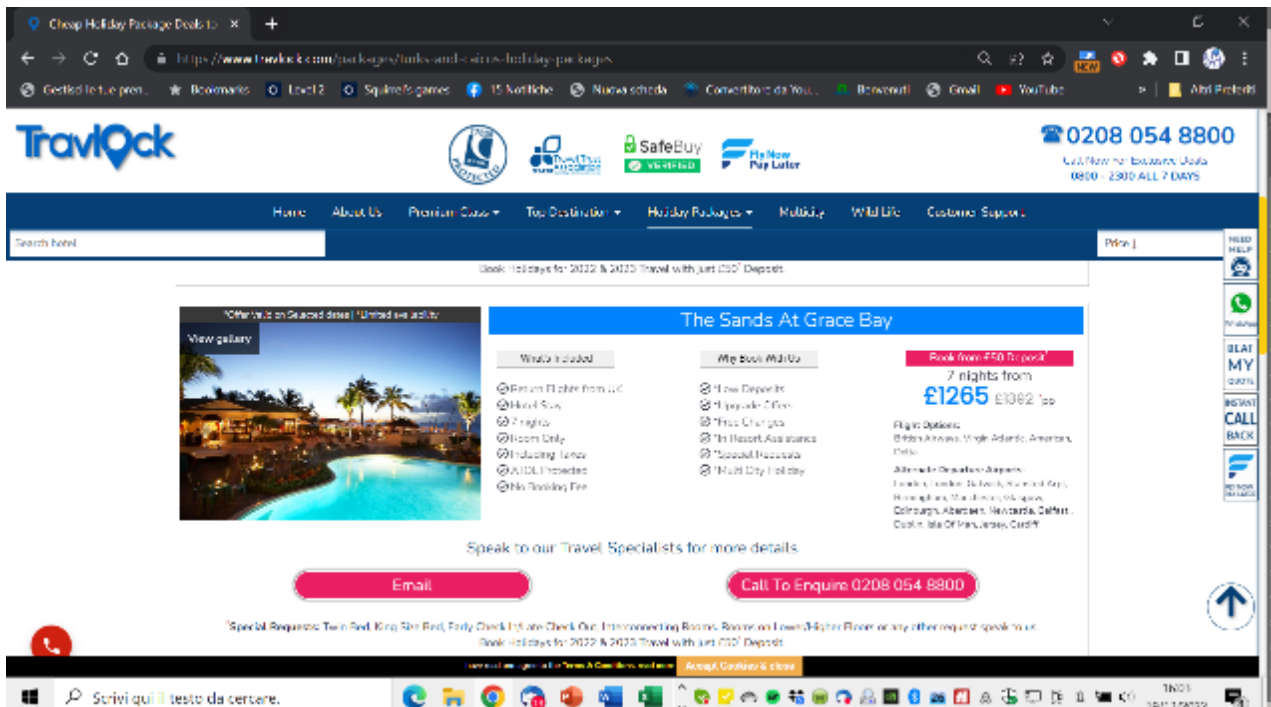
The lowest offer starts from 895 British Pound (1.090 USD):



What's Included:

- Return Flights from UK. Flight Options: British Airways, Virgin Atlantic, American, Delta. Alternate Departure Airports: London, London, Gatwick, Stansted, Birmingham, Manchester, Glasgow, Edinburgh, Aberdeen, Newcastle, Belfast, Dublin, Isle of Man, Jersey, Cardiff.
- Hotel Stay: **Ports of Call Resort**. 7 nights.
- Treatment: **Room Only**
- Including Taxes
- ATOL Protected
- No Booking Fee

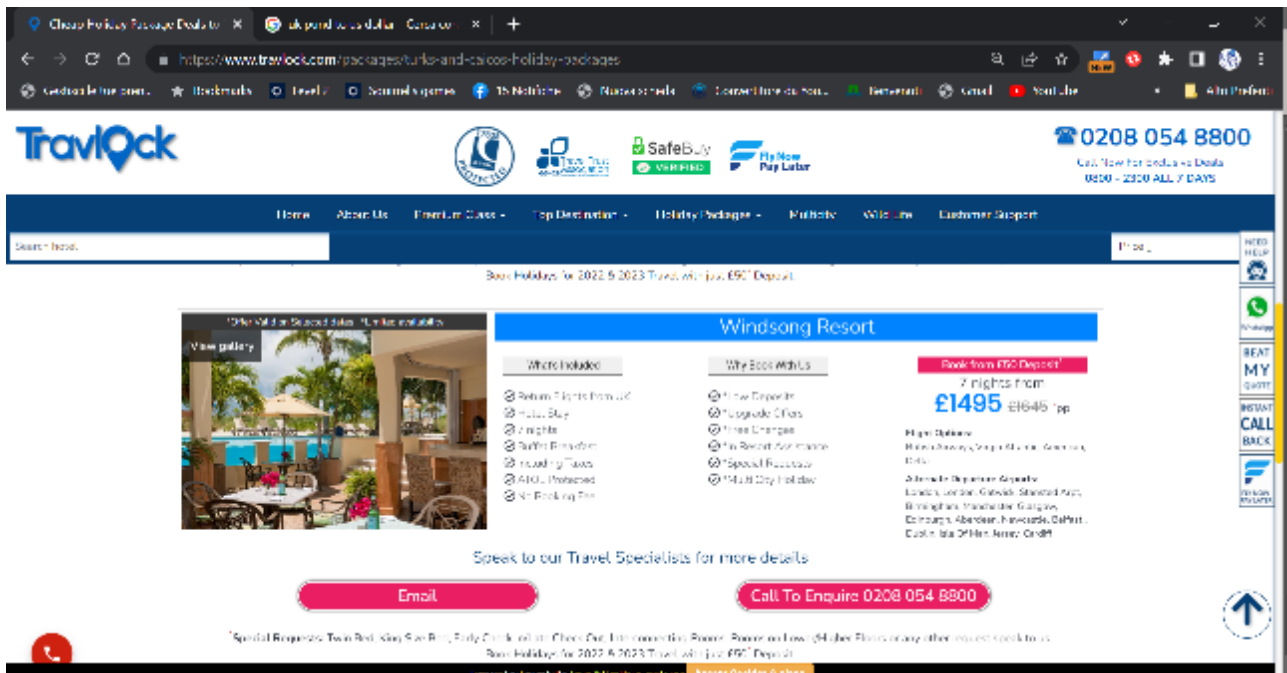
A second offer is proposed at 1265 British Pounds (1540 USD):



What's Included:

- Return Flights from UK. Flight Options: British Airways, Virgin Atlantic, American, Delta. Alternate Departure Airports: London, London, Gatwick, Stansted, Birmingham, Manchester, Glasgow, Edinburgh, Aberdeen, Newcastle, Belfast, Dublin, Isle of Man, Jersey, Cardiff.
- Hotel Stay: **The Sands At Grace Bay**. 7 nights.
- Treatment: **Room Only**
- Including Taxes
- ATOL Protected
- No Booking Fee

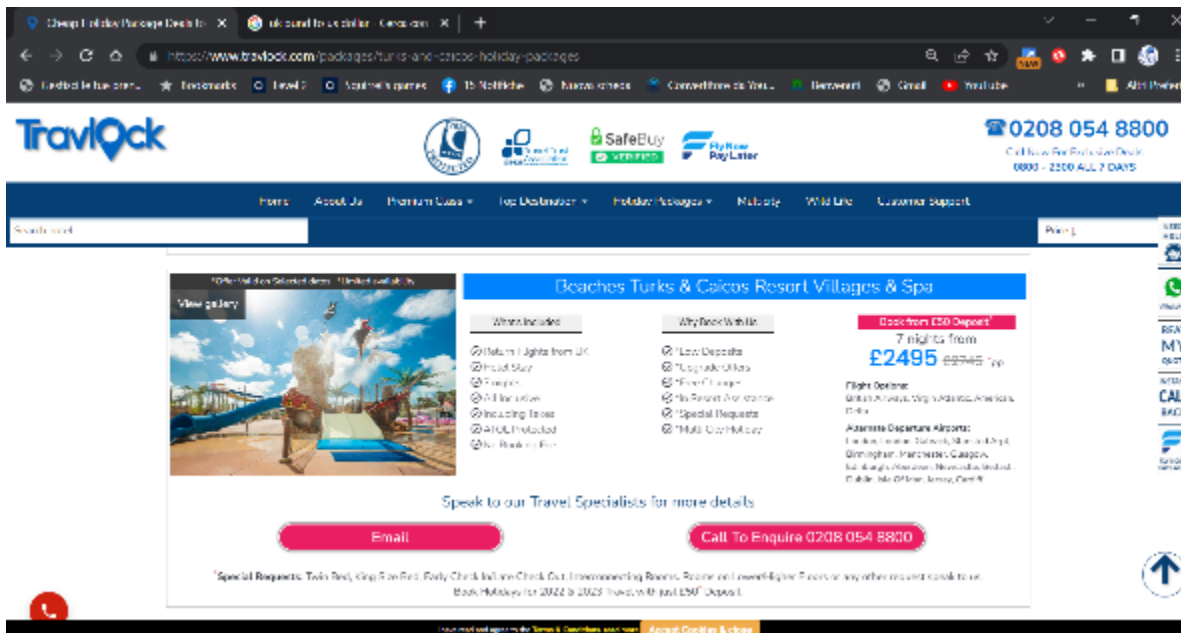
The third offer is prized 1495 British Pounds (1820 USD):



What's Included:

- Return Flights from UK. Flight Options: British Airways, Virgin Atlantic, American, Delta. Alternate Departure Airports: London, London, Gatwick, Stansted, Birmingham, Manchester, Glasgow, Edinburgh, Aberdeen, Newcastle, Belfast, Dublin, Isle of Man, Jersey, Cardiff.
- Hotel Stay: **Windsong Resort**. 7 nights.
- Treatment: **Buffet Breakfast**
- Including Taxes
- ATOL Protected
- No Booking Fee

The last offer is priced 2495 British Pounds (3038 USD)



What's Included:

- Return Flights from UK. Flight Options: British Airways, Virgin Atlantic, American, Delta. Alternate Departure Airports: London, London, Gatwick, Stansted, Birmingham, Manchester, Glasgow, Edinburgh, Aberdeen, Newcastle, Belfast, Dublin, Isle of Man, Jersey, Cardiff.
- Hotel Stay: **Beaches Turks & Caicos Resort Villages & Spa**. 7 nights
- Treatment: **All Inclusive**
- Including Taxes
- ATOL Protected
- No Booking Fee

OFFERS

Special Offers

<https://turksandcaicostourism.com/special-offers/>

Staycation

<https://turksandcaicostourism.com/staycation/>

Destination Weddings

<https://turksandcaicostourism.com/turks-and-caicos-weddings/>

Island Hopping

<https://turksandcaicostourism.com/island-hopping-2/>

2 Analysis of the current TCI Digital Marketing Strategy

Why is digital marketing crucial?

[A 2015 Deloitte survey](#) showed that digital tools were used by tourists before, during and after vacations. Before trips, digital resources are used to gather inspiration. When browsing through their mobile phones, [a 2019 Statista report](#) indicated that almost 70% of US travellers use search engines for general web research, 36% use social media and 16% go through official tourism websites to find trip inspiration.

Once travellers have decided on their destination, digital tools are still used for booking and planning purposes. A [2018 Google study](#) highlighted that 45% of US smartphone users were comfortable researching, booking and planning their entire trip using their mobile device. [Based on a 2018 Facebook study](#), over 60% of US travellers find their flights, accommodations and experiences online. When they are on vacation, tourists keep on using [online resources to find experiences, places where to eat](#) or to find their way and get directions. And finally, [after they return from their trip](#), consumers are prone to sharing photos, videos and reviews from their experiences on social media or review websites. Those Users Generated Contents will then be useful for future tourists who seek inspiration online, as a [majority of travellers](#) are influenced by UGC when searching for travel inspiration.

Yet, not all travellers and customer segments are using those digital tools in the same way. [A 2016 Expedia survey](#) indicates that 16% of baby-boomers, 29% of Generation X and 42% of Millennials are influenced by their peers' pictures on social media when searching for travel inspiration. Whether to plan their trips or when they are back home, [young tourists from 20 to 30 years old are most likely to use social media](#) platforms where visual contents are being shared. On the other hand, older tourists (40 and older) mostly rely on review sites to make decisions.

[Some social media platforms are more or less popular among the different demographic segments](#), implying that targeting specific types of tourists requires a specific strategy that fits the platforms and its users. For instance, reaching out to people over 50 years old will be easily done through Facebook, since more than 70% of this segment is a frequent user. On another hand, Instagram will be particularly effective to target younger tourists from 18 to 29 years old as 70% of them are using it, same goes with people between 30 and 49 since half of them are making use of Instagram as well. Finally, Twitter and TikTok will be great tools to solely reach the youngest travellers younger than 30, with 40% of them using those two social networks compared to only about 15% of people above 50 years old.

Seeing the impressive numbers of people using the Internet and digital tools for travel purposes, there is no denying the importance of digital marketing. Tourists rely heavily on online resources in their travel process - from finding inspiration, to planning, booking and sharing their experiences after the trip-. Understanding the needs and behaviours of travellers is the key for [tourist destinations](#) to promote, sell the destination, create a link with tourists and earn their loyalty in the long-run. In order to do so, a [digital marketing strategy](#) is required to provide the right content to the right targets on the right platforms. However, a [SmartInsights research](#) indicated that in 2016, 47% of marketers did not have a proper digital marketing strategy to promote their businesses.

TCI Digital Marketing Strategy Analysis

- Website

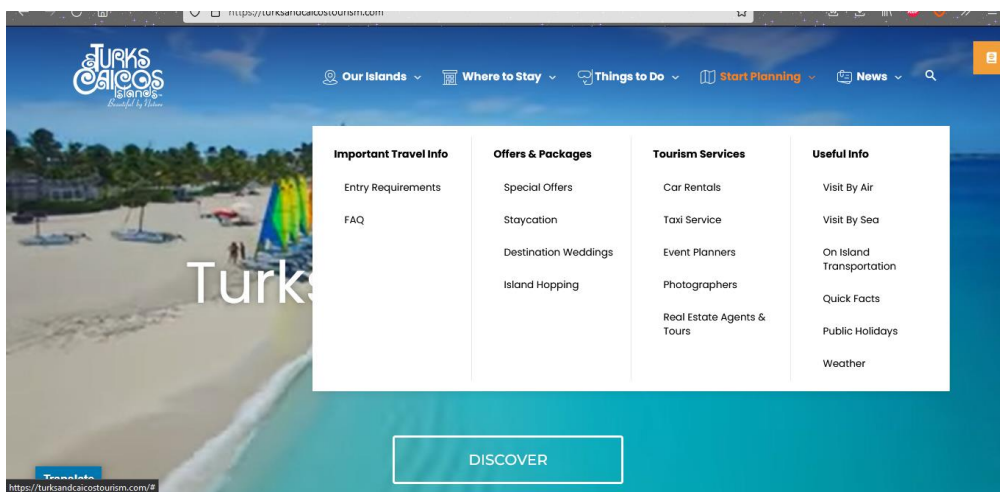
Being the easiest source of information for tourists to find, especially when searching for “Turks and Caicos” on Google, the TCI website is a crucial tool and an open door to learning more about the Turks & Caicos Islands.

On the homepage, we identified a desire to show how dreamy the destination is, with typical Caribbean views and bright colors well representing the sea and sky, which is what we could expect from a Caribbean tourist board’s website. The opening page video is a great chance for tourists to get a taste of what the TCI look like, and other pictures could even be added to showcase even more the destination through the website and especially the homepage.



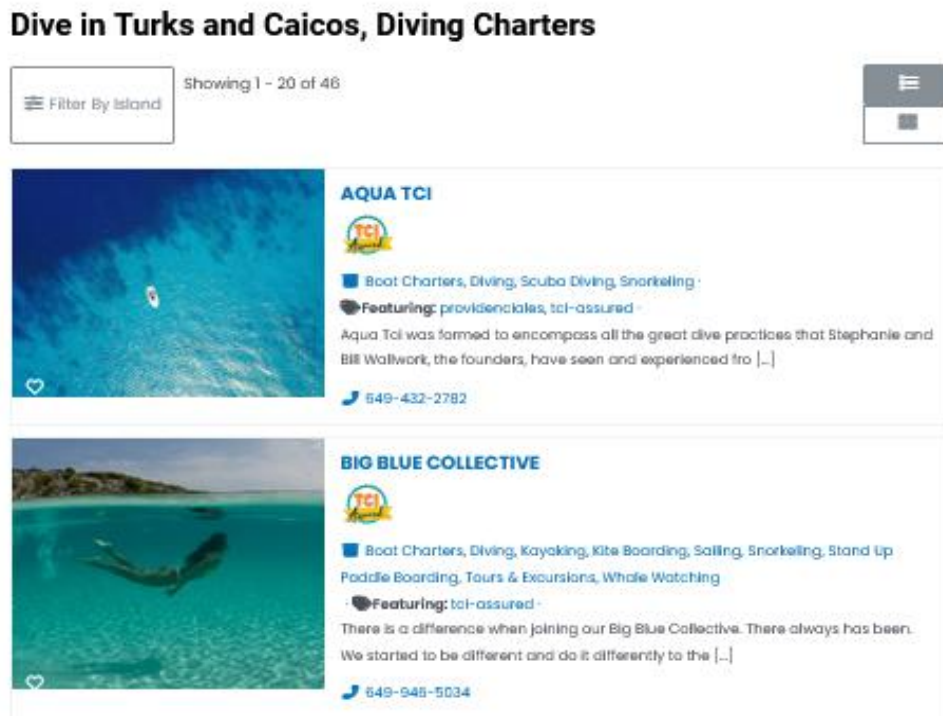
Opening video on the TCI website, showing the best images of the destination.

The menu is rich in terms of entries and pages, providing online users with plenty of information to look through. However, there might be some room for improvement as all those entries seem to sometimes be redundant. For instance, pages like FAQ, Entry Requirements, and Quick Facts include fairly similar information that could be merged. Tourists who are looking for information concerning their arrival on the Turks & Caicos islands, the currency, tipping habits, language, telephone, bank specificities, etc. might not always navigate easily through the pages. Merging those pages and information could ease the research process for users and simplify the website.



Rich menu with information for tourists.

In terms of content, the tourist board’s website highlights the islands and their specificities, as well as the culture of the destination. In addition to that, lists of services and tourism stakeholders that are present in the destination are available on various pages. Activities and experiences as well as accommodations and restaurants are listed for tourists who can easily find their contact details. This effort to promote tourism stakeholders and facilitate the search for tourists is a good start, but we think there might be some possible improvement as well.



List of tourism stakeholders able to offer diving experiences in the TCI.

At the moment, with those listings, the TCI website stands for a directory but might lack additional useful contents. The exclusive experiences pages are a good example of what the rest of the website could look like to provide unique content about the destination that tourists can’t find elsewhere. For instance, the [Whale watching](#) page includes a list of companies that could organize whale watching experiences for tourists, but also contains detailed and informational contents focused on why the TCI is an attractive destination for this kind of experiences, why it is unique or some historical and geographical overview. By sharing this kind of valuable content which highlights the most attractive features of the islands as well as the list of partners and services providers, the website becomes even more useful to tourists.

- **Blog**

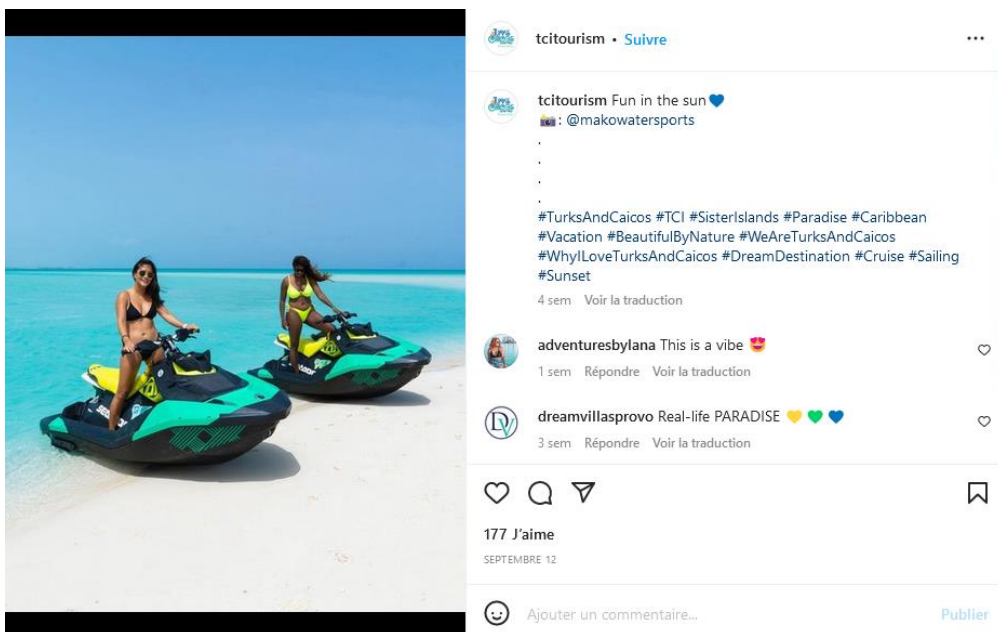
The TCI blog is a good additional source of information for users, as the articles focus on some aspects of the destination that are not particularly detailed in the rest of the website. By exploring more in-depth the culture, events and activities, the blog highlights the attractiveness of the islands and what visitors can expect over there. However, those interesting contents could be optimized and their potential enhanced with an SEO strategy that would improve the referencing of the blog posts and a more regular publication calendar to create an expectation from tourists waiting for future articles.

- Social media

By being present on different social media platforms such as Facebook, Instagram, Twitter and YouTube, the TCI tourist board is able to reach all different demographic segments.

The Facebook account is the only TCI account that is verified. However, on Instagram, another Turks and Caicos account is present and more popular than the official tourist board's one. With 5 times more followers, the Instagram account "[Turksandcaicos](#)" is the first one appearing to users when they are searching TCI related contents.

There is a huge potential for growth for the social media presence, notably on Instagram, since over 1 million of posts are tagged with #turksandcaicos. Moreover, the current TCI strategy of reposting other users contents is a great chance to involve returning tourists who share their pictures online and therefor a first step to create an online and loyal community.



Typical TCI Instagram post promoting sea-related activities and repost of tourists' pictures.

On Facebook, Instagram and Twitter, the pictures posted are always the same, and we weren't able to identify a clear strategy for each platform. However, the aesthetically pleasing pictures that are being shared and that showcase the best features of the destination -sea, boats activities, marine wildlife- are suitable to attract users with visually captivating contents. Yet, we think improvement could enhance the digital presence of the destination, notably by putting more focus on the description of the posts. At the moment, descriptions are quite short and don't call for a lot of interaction, which explain the regular numbers of likes and the few comments, but some posts are performing a lot more and indicate that there is potential for growth. Pictures with texts and detailed information create more engagement and allow us to think that providing useful data would create more engagement with the online community.

Annex E: Assessment of the online positioning of TCI as tourism destination



Examples of TCI well performing Instagram posts - providing information to users.

Other Tourist Boards Case Study

To get an overview of what other tourist boards are doing and what kind of digital marketing strategy they adopted, we decided to conduct a case study on other destinations including three Caribbean destinations - the Bahamas, Aruba and Barbados- as well as Scotland which is often used as a good example for digital marketing in the tourism industry.

	Turks & Caicos Beautiful by nature	The Bahamas fly away	Aruba One happy island	Barbados Visit Barbados	VisitScotland Scotland is calling
International tourism arrivals (2019)	1,598,557	7.250.000	1,951,000	966,000	3.460.000
Website	Classic appearance not characteristic of the TCI, rich services listing with few detailed contents	Clean style, logo shape used in-page (brand consistency), rich in terms of information.	Bright colors and modern, easy-to-use menu, rich in terms of info, great user experience.	Bright colors and modern, lots of menu entries quite organized but hard to collect information	Classic and not particularly good looking, but well-structured, clear menu and easy to navigate through.
Search & Booking system	No	Yes (searching & booking online)	Yes (searching)	No	Yes (searching)
Blog	Yes	Yes	Yes	No	Yes

	<u>Turks & Caicos</u> Beautiful by nature	<u>The Bahamas</u> fly away	<u>Aruba</u> One happy island	<u>Barbados</u> Visit Barbados	<u>VisitScotland</u> Scotland is calling
Social Media	Facebook, Twitter, Youtube, Instagram	Facebook, Twitter, Youtube, Instagram, Pinterest	Facebook, Twitter, Youtube, Instagram, Pinterest, TripAdvisor	Facebook, Twitter, Youtube, Instagram	Facebook, Twitter, Youtube, Instagram

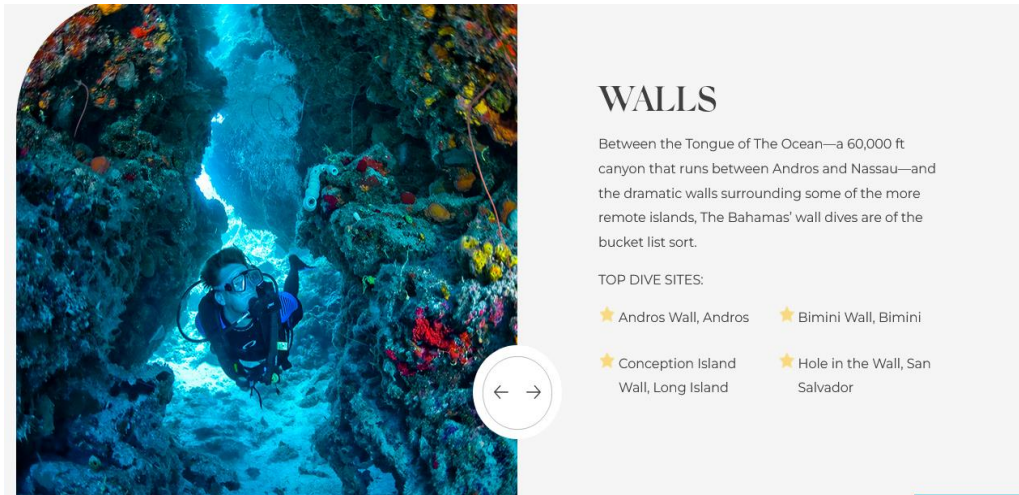
- Website

A good example in terms of brand consistency is the Bahamas, which uses the shape of its logo for the website design. In addition to that, clean colors and stylish fonts that match with the brand image are displayed. The thin and italic fonts that are used, notably on the opening video, allude to a sophisticated and luxury image that can fit the Bahamas’ identity.



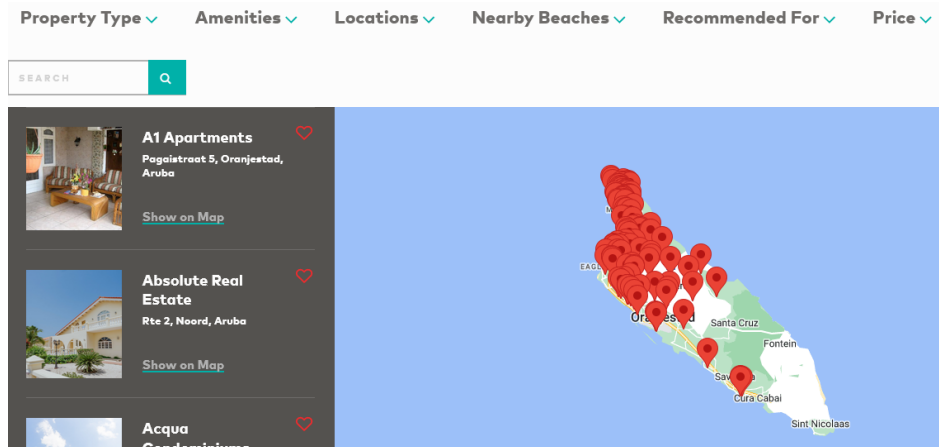
The Bahamas homepage video and logo matching for a consistent brand image.

Menus organizations are optimized with fewer entries but gathered information. Well-organized pages make navigation easier for tourists who search for information and allow them to focus on the content of the website to explore and learn more about the destination. Consequently, tourist boards use their website as a platform where they can showcase the destination and promote it with detailed contents.



The Bahamas website page promoting diving experiences and sites with content and pictures.

High quality pictures are used, accompanied by pages promoting places, outstanding experiences and cultural manifestations that are available on the destinations. Similarly to what the TCI tourist board offers, lists of tourism stakeholders are accessible for tourists to browse through, but the lists are structured with maps and even search and filter engines that make the research process more interactive for users. Being able to filter in the list of tourism stakeholders allows more personalization for tourists who can select accommodations, restaurants and experiences that match their profile, whether they are traveling with friends or family, and they can get a selection based on their budget, on their interest, etc.



Interactive map of tourism stakeholders on Aruba's website.

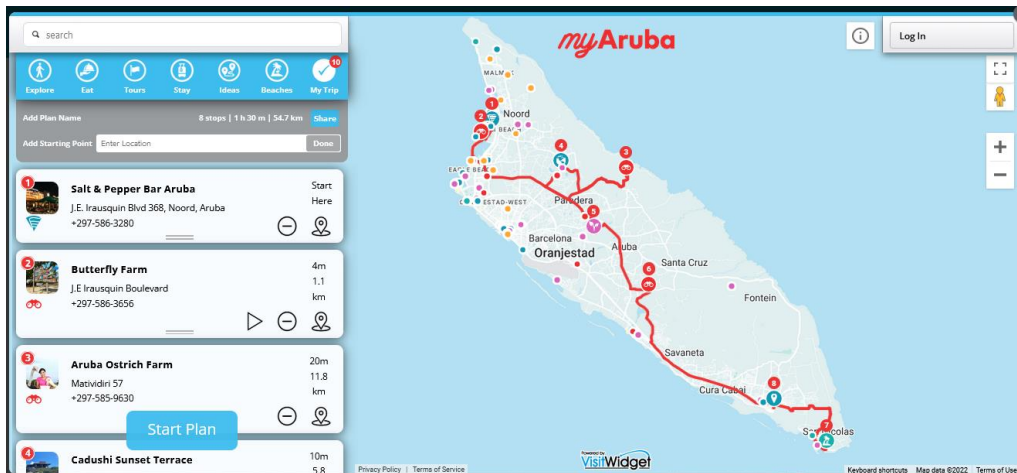
Thanks to these tools, availability and prices are displayed and tourists interested in visiting the Bahamas, for instance, can even book directly on the tourist board's website.



Booking system directly accessible on The Bahamas website.

In addition to that, a travel itinerary planner tool is also available on Aruba's website. **myAruba** provides users

with an interactive map including accommodations, restaurants and activities available on the island. Similarly to the interactive map presented before, this travel planner tool allows tourists to like and save the accommodations, activities and experiences they are interested in to create an itinerary they will be able to use during their trip.



myAruba, itinerary travel planner on Aruba website.

Future tourists are encouraged to create an account to save the personalized itinerary they created. Having tourists create an account is a chance for the tourist board to collect data concerning the visitors and their travel habits. Once again, this is also a chance to provide a personalized and interactive experience to tourists while they are still in their planning process.

- **Blog**

Aruba and Scotland are good examples in terms of blog practices, even though their posting schedule is not consistent. The blog articles cover topics that are not particularly detailed in the rest of the website. Consequently, themes like eco-travel, local initiatives and cultural specificities, particularly appreciated by tourists, show new attractive aspects of the destinations and demonstrate the various offers tourists can experience. Aruba’s blog series “Local in the Spotlight” is a great way to show the human richness of the island but also the warmth of its culture and put more focus on its tradition rather than only promoting sea activities.



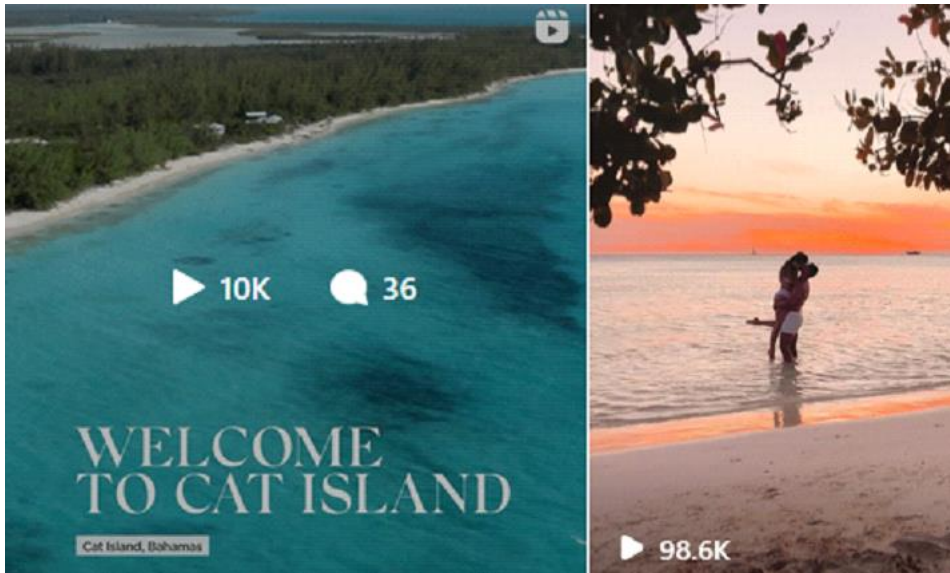
VisitScotland and Aruba blog posts examples.

Moreover, SEO is taken in consideration with in-text optimization including back-links, headings and subheadings, keywords, CTA, etc.

- **Social media**

With clear names, other tourist boards' social media accounts are easy to find for tourists, and most of the

accounts are verified. The blue checking sign is a nice way for tourists to know they can rely on those accounts to get reliable information and contents. Speaking about contents, on Instagram, pictures are not the only sources of information used. Reels, guides and videos allow tourist boards to diversify the contents they share online and to reach more people and different targets. The topics are also varied, even with Caribbean destinations that could rely on the sea and beaches only, with promotion of food and cultural heritage and attractions.



Reels and videos viewed by significantly more people, the Bahamas, Instagram.

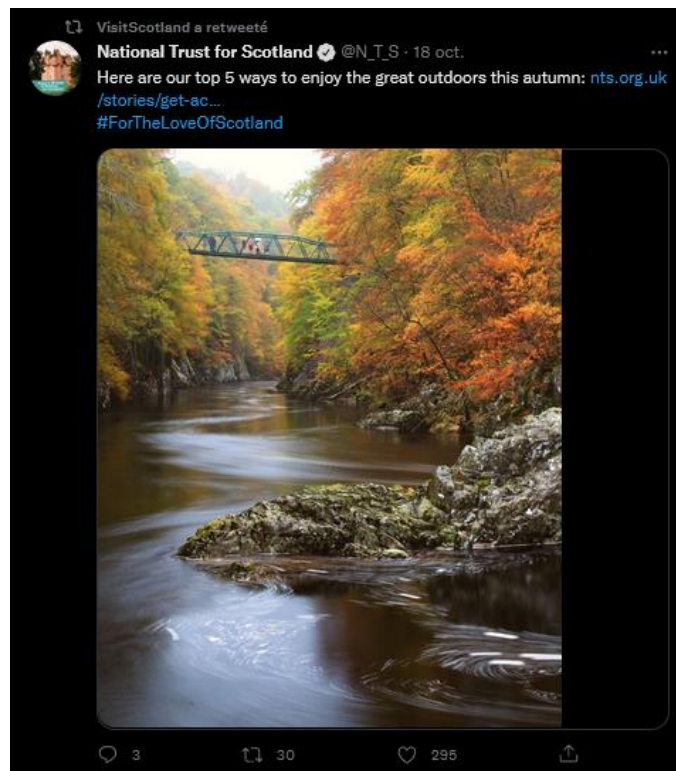
Interactions are enhanced through social media; descriptions might not always be very detailed but Call To Actions are often used with questions that encourage travelers to comment, like and share the post. By replying to those comments, tourist boards contribute to the creation of a community as travelers are valued and can engage with the destination. This community is strengthened with the use of influencers who match the destinations' image and who are solicited to promote the destination and organize giveaways that will allow tourists to travel with advantages. That is the case of Aruba that collaborated with two influencers, - photographers, sea addicts and pet lovers- who are relevant people to promote the island with a giveaway allowing travelers to visit Aruba with their pets with a discount.

Annex E: Assessment of the online positioning of TCI as tourism destination



Partnership in-between ArubaTourism and influencers, Instagram.

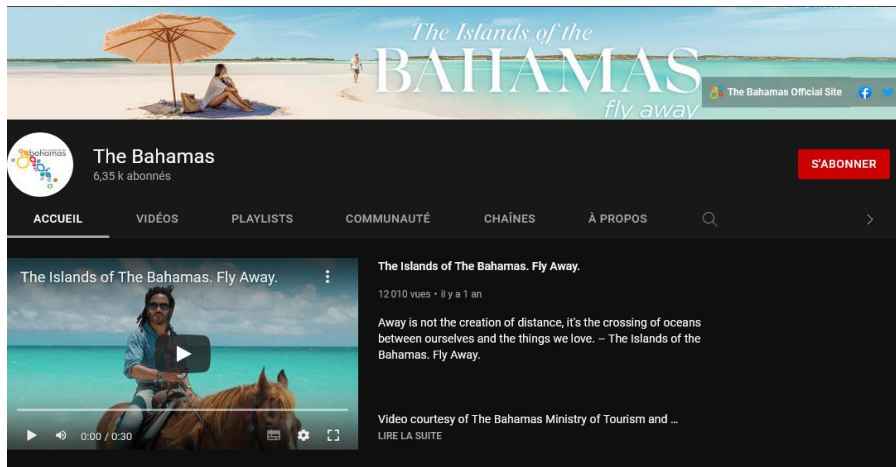
On Facebook and Twitter, the contents are fairly the same as on Instagram -which seems to be the principal social media used by tourist boards-. The strategy is similar, being focused on aesthetic pictures and videos showcasing the destination and with descriptions that encourage engagement and interaction. Yet, VisitScotland also makes use of its Facebook and Twitter accounts to share and retweet additional promotional contents being VisitScotland's blog posts or publications shared by other institutions promoting Scotland such as the National Trust for Scotland.



Retweet of the National Trust for Scotland by VisitScotland, Twitter.

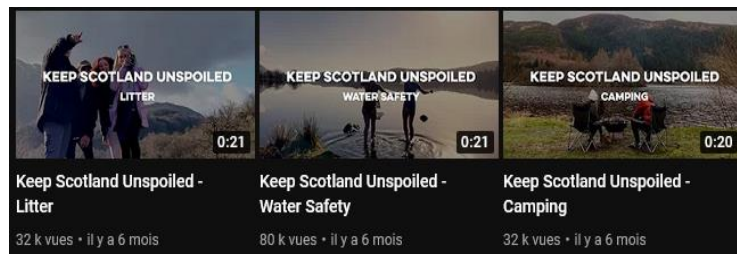
The YouTube strategy of tourist boards is particularly interesting as destinations took care of their pages,

including by editing their profile with links to their other platforms, contact details, promotional banner and by saving one of the videos on their homepage. This simple editing and organization of the profile gives to the YouTube account a more professional appearance while also showcasing the best of the destination.



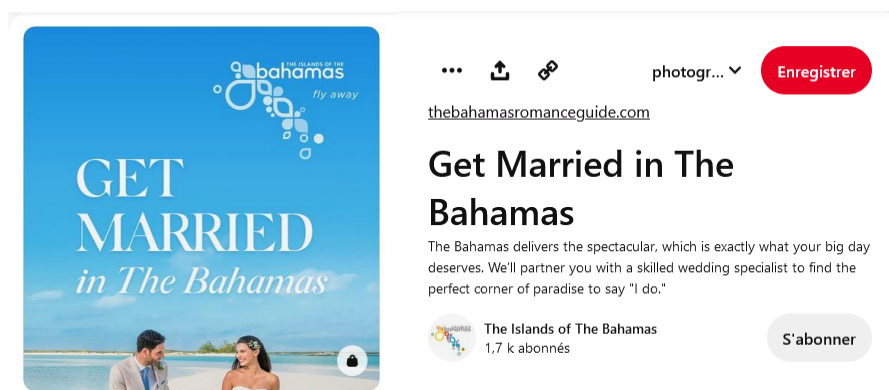
The Bahamas channel homepage, YouTube.

In terms of content, the YouTube channels are not regularly updated either but the short thematic videos focused on specific messages and clear informational topics to the audience appear as useful, enriching and interesting to tourists. The themes of the videos vary depending on the destination and are sometimes integrated in series that viewers can follow eagerly. Examples of those series include "Keep Scotland Unspoiled" focused on how tourists can enjoy Scotland without impacting the environment or "Visitor's Guide to Safe Travel to Aruba" which provide tourists with practical advice to organize their trips to Aruba from the first research to their experience in the destination.



Keep Scotland Unspoiled - VisitScotland videos series, YouTube.

Some of the destinations also make use of other social media platforms such as Pinterest. For tourist boards, using Pinterest is another way to share aesthetic and beautiful pictures with potential travelers. This is also the chance to create thematic travel content and link them to their website. A great example would be the Bahamas that uses Pinterest to create contents and guides focused on marriage in the islands. Consequently, users looking for wedding destinations and inspiration can end up with the Bahamas contents and easily get a link to the website where they can find more information.



Get Married in The Bahamas. The Bahamas, Pinterest.

Lessons learnt

Even though the digital marketing strategy of other tourist boards might not always be completely structured, especially considering the lack of posting calendar on the blog and of suitable strategy for the different social media platforms and targets, thanks to our case study, we were able to identify a few of the best practices that could be interesting and inspiring for the TCI.

We noted that website structuration is crucial for a good user experience and navigation online. While providing lots of information to tourists is important, limiting the number of entries and merging practical information together allow an easier research process. In addition to that, completing the listing of services providers available in the destination with descriptive contents, added-value highlighting how unique the destination is and search and booking system make the consumer's journey more fluid, interactive and personalized.

The importance of SEO is also crucial so that blog posts can be referenced on Google and shown to more potential tourists. Those posts are covering topics that are not presented elsewhere and showcase hidden features of the destination -local heritage, ecotourism opportunities, exclusive experiences-.

Concerning social media, verified accounts are a popular way to get more credibility and short easy-to-understand names makes it easier for users to find the tourist boards online. Tourist boards are generally taking advantage of the various types of content that can be shared on social media platforms -pictures, videos, reels, guides- and don't hesitate to share content other than aesthetic sea pictures. This way, followers can explore and learn more about the culture, food, activities and other experiences available in the destination they plan to visit. This is a way for Caribbean destinations to showcase the richness of their offers by highlighting that beaches are not the only attractions. Moreover, the description of posts is also a major tool that is used by destination. Tourist boards were able to show that long descriptions are not particularly needed to be attractive to tourists, but short descriptions with CTA can be sufficient to create engagement and interaction with followers. Encouraging interactions with tourists -through comments and repost of users' pictures- allows destinations to create a link with visitors.

Finally, having a consistent brand image and identity is a better way for tourist boards to be perceived as organized and recognizable among other destinations. This includes having an image, tone and style tailored to the destination that will be used consistently no matter the digital support.

Recommendations for TCI

From our analysis, we could not identify a digital marketing strategy for the TCI tourist board, yet interesting and promising structures are already present and could just be improved by getting inspiration from other tourist boards activities.

The website is a great source of information, especially as users are able to browse through an extensive list of services providers present in the destination, but additional contents could give a real added-value to the website by highlighting the most attractive features of the destinations with explanatory texts and high-quality pictures. In addition to that, enriching the list of services providers with an interactive search and booking system would offer a personalized experience to users while promoting more effectively tourism stakeholders. Tourists would get a selection of accommodations or experiences that match their taste and tourism stakeholders would be more directly promoted to the right target.

A regular posting schedule also seems crucial to structure the blog and social media organization and encourage users to regularly follow the tourist board's publications. Moreover, having a consistent editorial line and tone would harmonize all contents and strengthen the brand image. The blog is a great source of information as it allows the TCI to mention topics that are not promoted on the rest of the website. Optimizing the articles with SEO techniques would give a chance for the blog to be referenced on Google and shown to more people, attracting more potential tourists to the Turks and Caicos Islands.

More detailed contents, including CTA, could be proposed for the social media accounts in order to enrich the aesthetic pictures that are being shared online and to create more engagement and interaction in-between tourists and the destination. Diversifying the types of content and the topic to broadcast reels and short videos would allow the promotion of the destination as a whole and not only based on sea-related features. Users' contents are reposted, which is already a great way to involve users. A real community could be built with a strategy focused on creating interaction and sharing contents suitable for each platform and each target.

3 TCI social media-based Reputation Analysis.

Methodology¹:

Target Euro used data provided by Olery² to analyse the Reputation of Turks & Caicos with Data extracted directly from written reviews and mentions on the following social media: TripAdvisor, Google, Expedia.com, Booking.com, Open Table, Hotels.com, Yelp, Orbitz, Facebook, Travelocity, CheapTickets, and Agoda, Holidaycheck.de

A. Sentiment analysis:

Olery uses a software that analyses reviews and evaluates the tone, intent, and emotion within each review on social media in 14 native languages to determine **the guest sentiment**.

Two banks of Lexicons are identified:

- Positive/Neutral/Negative keywords
- Sentiment Ratings Keywords – e.g., waiter, service

B. Numerical Rating:

Positive and Negative Sentiment Ratings Keywords are converted into a Numerical Score of 1-10

C. TES Traveller Experience Score:

Uniting the Sentiment Analysis (A) and Numerical Ratings (B), Olery generates an easy-to-understand *Traveller Experience Score (TES)* on key indicators of the destination.

The analysis – with a data range of 6 months from 2022-07-07 to 2023-01-07 - focuses on 3 specific categories:

- 1) Accommodation
- 2) Attraction
- 3) Restaurant

The following results regard the entire country Turks & Caicos, including Grand Turk, Middle Caicos, North Caicos and Providenciales. Data on other islands and cays are not available.

¹ Online Review status: we analyzed a range of reviews left by tourists on online sources such as Facebook, Google, TripAdvisor, Booking.com, Foursquare. This will provide us with valuable information on how TCI is viewed by its visitors, as well as highlight areas for improvement and additional marketing that will be a key area for the development of the DMO. This information will be provided thanks to an online platform designed by Target Euro called **Toumake**.

² Olery is a leading Sentiment Analysis Technology in the Hospitality Industry <https://olery.com/> and <https://guest-experience.com/>

1) Category: Accommodation



Rating	Cleanliness	Facilities	Service	Food and Beverages	Value	Location	Ambience
Numerical Rating	9.1	9.1	8.9	9.2	8.5	9.6	9.3
Sentiment Rating	8.8	9.0	9.1	9.2	9.1	8.8	9.2
TES Score	8.9	9.1	9.0	9.2	8.8	9.2	9.3

Below detailed tables connected to these results:

Table 1: RATING

Ranking	KPI	Reviews	Ratio	Rating
1	overall	10648	56.4%	9,2
2	service	2388	12.6%	8,9
3	room	1272	6.7%	8,5
4	location	1255	6.6%	9,6
5	cleanlines	1053	5.6%	9,1
6	value	1053	5.6%	8,5
7	facilities	553	2.9%	9,1
8	fnb	396	2.1%	9,2
9	ambience	263	1.4%	9,3

As shown in the table the highest rating relates to the location (9,6), followed by ambience (9,3) and food & beverage (fnb / 9,2), while the lowest regards value for money (although 8,5 is still an extremely high rating).

Most reviews regard the accommodation experience in general (overall), followed by service.

Table 2: COMPOSITION

Ranking	KPI	Reviews	Ratio	Rating
1	Couples	1714	38.9%	9,3
2	Families	1675	38.0%	9,1
3	Friends	669	15.2%	9,5
4	Solo	177	4.0%	9,1
5	Group	92	2.1%	8,9
6	Other	64	1.5%	9,5
7	Business	15	0.3%	9,5

Most satisfied visitors are friends and businesses travellers (9,5), while the lowest rating regards groups (with an extremely high rating of 8,9).

The largest reviewer segment regard couples, followed by families, while business travellers almost avoid reviewing.

Table 3: COUNTRY

D16 - National tourism strategy and implementation plan

Annex E: Assessment of the online positioning of TCI as tourism destination

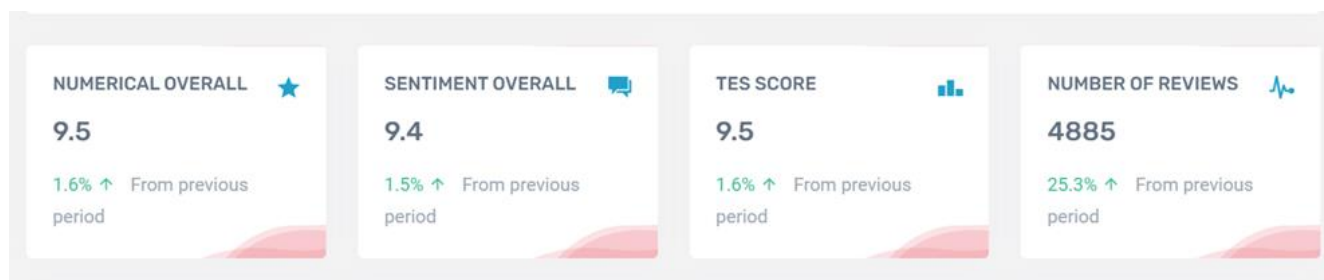
Ranking	KPI	Reviews	Ratio	Rating	Ranking	KPI	Reviews	Ratio	Rating
1	United States	2485	79.7%	9,1	29	Bolivia	2	0.1%	9,0
2	Canada	290	9.3%	9,0	30	Ecuador	2	0.1%	9,0
3	United Kingdom	80	2.6%	9,1	31	India	2	0.1%	6,0
4	France	43	1.4%	8,8	32	Saudi Arabia	2	0.1%	9,5
5	Italy	34	1.1%	9,0	33	The Netherlands	2	0.1%	9,5
6	Turks and Caicos Islands	24	0.8%	9,5	34	Tonga	2	0.1%	6,0
7	Argentina	16	0.5%	8,3	35	Anguilla	1	0.0%	6,0
8	Jamaica	16	0.5%	9,3	36	Aruba	1	0.0%	10,0
9	Bonaire, Sint Eustatius and Saba	11	0.4%	10,0	37	Bermuda	1	0.0%	10,0
10	Brazil	11	0.4%	8,4	38	Cyprus	1	0.0%	8,0
11	Mexico	7	0.2%	9,4	39	Czech Republic	1	0.0%	10,0
12	Poland	7	0.2%	8,7	40	Guatemala	1	0.0%	10,0
13	Spain	6	0.2%	8,3	41	Hong Kong	1	0.0%	10,0
14	Chile	5	0.2%	9,6	42	Kuwait	1	0.0%	9,0
15	Germany	5	0.2%	8,8	43	Luxembourg	1	0.0%	10,0
16	Portugal	5	0.2%	8,6	44	New Caledonia	1	0.0%	10,0
17	South Africa	5	0.2%	8,8	45	Peru	1	0.0%	9,0
18	Switzerland	5	0.2%	9,6	46	Puerto Rico	1	0.0%	10,0
19	Australia	4	0.1%	9,5	47	Qatar	1	0.0%	10,0
20	Antigua and Barbuda	3	0.1%	10,0	48	Republic of North Macedonia	1	0.0%	9,0
21	Belgium	3	0.1%	9,3	49	Slovenia	1	0.0%	10,0
22	Dominican Republic	3	0.1%	10,0	50	Sweden	1	0.0%	8,0
23	Georgia	3	0.1%	8,7	51	Trinidad and Tobago	1	0.0%	9,0
24	Israel	3	0.1%	7,0	52	Turkey	1	0.0%	7,0
25	Singapore	3	0.1%	7,3	53	United Arab Emirates	1	0.0%	10,0
26	Austria	2	0.1%	7,0	54	Vietnam	1	0.0%	10,0
27	Bahamas	2	0.1%	10,0	55	Western Sahara	1	0.0%	10,0
28	Belize	2	0.1%	6,0	56	Zimbabwe	1	0.0%	4,0

Top reviewers are those from priority markets: US, Canada, and UK. Travellers from these countries express a satisfaction between 9,0 and 9,1.

Table 4: SOURCE

Ranking	KPI	Reviews	Ratio	Rating
1	TripAdvisor	5565	52.3%	9,2
2	Google	3816	35.8%	9,1
3	Expedia.com	493	4.6%	9,1
4	Booking.com	285	2.7%	8,6
5	Open Table	263	2.5%	9,4
6	Hotels.com	90	0.8%	9,3
7	Yelp	50	0.5%	8,0
8	Orbitz	39	0.4%	9,1
9	Facebook	38	0.4%	10,0
10	Travelocity	5	0.0%	9,6
11	CheapTickets	2	0.0%	10,0
12	Agoda	1	0.0%	8,8
13	Holidaycheck.de	1	0.0%	10,0

2) Category: Attraction



Ratings Comparison ⓘ

Rating	Cleanliness	Facilities	Service	Food and Beverages	Value	Location	Ambience
Numerical Rating	9.1	9.1	8.9	9.2	8.5	9.6	9.3
Sentiment Rating	9.2	9.4	9.6	9.4	9.6	8.9	9.3
TES Score	9.1	9.3	9.3	9.3	9.1	9.3	9.3

The following 68 categories of attractions (and services) are included:

4WD, ATV & Off-Road Tours	Adrenaline & Extreme Tours	Art galleries	Bar, Club & Pub Tours	Beach & Pool Clubs
Beaches	Bike Tours	Boat Rentals	Boat Tours & Water Sports	Bodies of Water
Breweries	Bus services	Bus Tours	Casinos	Caverns & Caves
City Tours	Classes & Workshops	Cultural Tours	Day Trips	Dolphin & whale watching
Ecotours	Ferries	Fishing Charters & Tours	Food & Drink	Fun & Games
Gears Rentals	Geologic Formations	Golf Courses	Health Clubs	Historical & Heritage tours
History Museums	Horseback Riding Tours	Islands	Kayaking & Canoeing	Lookouts
Motorcycle tours	Nature & Wildlife tours	Night tours	Nightlife	Outdoor activities

Parasailing & paragliding	Points of Interest & Landmarks	Private Tours	Public Transports Systems	Reefs
(River rafting) & tubing	Safaris	Scuba & snorkelling	Segway Tours	Self-guided tours & rentals
Shark Diving	Shopping	Sightseeing Tours	Spa & Wellness	Speciality & Gift Shops
Speed Boat Tours	Sports Camps & Clinics	Sports Complexes	Stand Up Paddleboarding / SUP	Surfing & Windsurfing
Swim with Dolphins	Taxis & Shuttles	Things To Do	Tours	Transportation
Vespa, Scooters & Moped Tours	Water Sports	Water-skiing & Jet-skiing		

Below detailed tables connected to these results:

Table 5: OVERALL RATING

Ranking	KPI	Reviews	Ratio	Rating
1	overall	4885	100.0%	9,5

average of 9,5.

The overall evaluation of the attractions and related-tourist services total an extremely high

Table 6: COMPOSITION

Ranking	KPI	Reviews	Ratio	Rating
1	Families	743	41.9%	9,7
2	Couples	616	34.7%	9,6
3	Friends	330	18.6%	9,7
4	Solo	79	4.5%	9,1
5	Business	5	0.3%	10,0

excellent 9, rating).

Families are the most active reviewers (42%), while business travellers in general do not make reviews (0,3%). The highest appreciation for attractions and tourist services are by business (10) followed by families (9,7), while solo travellers are less satisfied (even though with an

Table 7: COUNTRY

Ranking	KPI	Reviews	Ratio	Rating
1	United States	925	85.8%	9,5
2	Canada	56	5.2%	9,5
3	United Kingdom	33	3.1%	9,6
4	Turks and Caicos Islands	9	0.8%	10,0
5	France	8	0.7%	10,0
6	Italy	6	0.6%	10,0
7	Poland	4	0.4%	9,0
8	Brazil	3	0.3%	10,0
9	Georgia	3	0.3%	8,7
10	Switzerland	3	0.3%	9,3
11	Antigua and Barbuda	2	0.2%	10,0
12	Belgium	2	0.2%	10,0
13	Mexico	2	0.2%	10,0
14	Singapore	2	0.2%	6,0
15	Spain	2	0.2%	10,0
16	Tonga	2	0.2%	6,0
17	Argentina	1	0.1%	10,0
18	Aruba	1	0.1%	10,0
19	Australia	1	0.1%	10,0
20	Austria	1	0.1%	6,0
21	Bahamas	1	0.1%	10,0
22	Belize	1	0.1%	10,0
23	Bermuda	1	0.1%	10,0
24	Czech Republic	1	0.1%	10,0
25	Germany	1	0.1%	10,0
26	Hong Kong	1	0.1%	10,0
27	Israel	1	0.1%	6,0
28	Luxembourg	1	0.1%	10,0
29	New Caledonia	1	0.1%	10,0
30	Portugal	1	0.1%	10,0
31	Puerto Rico	1	0.1%	10,0
32	Slovenia	1	0.1%	10,0

A significant number of reviews are made by residents in the top 3 source markets: US, Canada, and UK: over 94%.

Table 8: SOURCE

Ranking	KPI	Reviews	Ratio	Rating
1	TripAdvisor	2923	59.8%	9,6
2	Google	1949	39.9%	9,4
3	Facebook	13	0.3%	10,0

Ratings regarding specific attractions vary significantly:

Table 9: GENERAL RANKING OF ATTRACTIONS

Ranking	Attraction	Rating	Reviews	Ranking	Attraction	Rating	Reviews
1	Classes & Workshops	10,0	32	35	Ecotours	9,6	338
2	Ferries	10,0	7	36	Kayaking & canoeings	9,6	590
3	Fun & Games	10,0	1	37	Water Sports	9,6	433
4	Health Clubs	10,0	3	38	Art galleries	9,5	4
5	History Museums	10,0	8	39	Fishing Charters & Tours	9,5	417
6	Sports Camps & Clinics	10,0	32	40	Nature & Wildlife tours	9,5	165
7	Sports Complexes	10,0	1	41	Parasailing & paragliding	9,5	238
8	Bike Tours	9,9	248	42	Tours	9,5	1560
9	Boat Rentals	9,9	28	43	Geologic Formations	9,4	38
10	City Tours	9,9	248	44	Reefs	9,4	34
11	Cultural Tours	9,9	248	45	Gears Rentals	9,3	232
12	Food & Drink	9,9	251	46	(River rafting) & tubing	9,3	12
13	Golf Courses	9,9	32	47	Self-guided tours & rentals	9,3	66
14	Historical & Heritage tours	9,9	248	48	4WD, ATV & Off-Road Tours	9,3	298
15	Motorcycle tours	9,9	248	49	Beach & Pool Clubs	9,2	266
16	Shark diving	9,9	160	50	Taxis & Shuttles	9,2	416
17	Speed Boat Tours	9,9	83	51	Transportation	9,2	377
18	Swim with Dolphins	9,9	56	52	Things To Do	9,1	489
19	Vespa, Scooters & Moped Tours	9,9	248	53	Beaches	9,0	82
20	Bus Tours	9,8	39	54	Bus services	9,0	31
21	Outdoor activities	9,8	350	55	Public Transports Systems	9,0	31
22	Scuba & snorkelling	9,8	2167	56	Breweries	8,9	18
23	Surfing & Windsurfing	9,8	98	57	Sightseeing Tours	8,9	49
24	Waterskiing & Jetskiing	9,8	337	58	Shopping	8,8	93
25	Adrenaline & Extreme Tours	9,7	23	59	Speciality & Gift Shops	8,8	93
26	Boat Tours & Water Sports	9,7	2950	60	Points of Interest & Landmarks	8,6	36
27	Bodies of Water	9,7	6	61	Bar, Club & Pub Tours	8,3	70
28	Caverns & Caves	9,7	6	62	Casinos	8,3	24
29	Day Trips	9,7	641	63	Nightlife	8,3	70
30	Horseback Riding Tours	9,7	104	64	Night tours	8,2	73
31	Private Tours	9,7	2027	65	Safaris	8,1	21
32	Spa & wellness	9,7	54	66	Segway Tours	8,1	21
33	Stand Up Paddleboarding / SUP	9,7	377	67	Islands	8,0	1
34	Dolphin & whale watching	9,6	272	68	Lookouts	8,0	5

This ranking is conditioned partially by the inclusion of categories which total very few to even only one review. Based on this ranking the top attractions and services appear to be:

- Classes & Workshops
- Ferries
- Fun & Games
- Health Clubs
- History Museums
- Sports Camps, Sports Clinics & Sports Complexes

To have a more realistic outline on the sentiment and appreciation of attractions and services we have filtered the attractions by considering only the ratings based on least 50 reviews, the results are as follows:

Table 10: FILTERED RANKING OF ATTRACTIONS (over 50 reviews)

Ranking	Attraction	Rating	Reviews
1	Bike Tours	9,9	248
2	City Tours	9,9	248
3	Cultural Tours	9,9	248
4	Food & Drink	9,9	251
5	Historical & Heritage tours	9,9	248
6	Motorcycle tours	9,9	248
7	Shark diving	9,9	160
8	Speed Boat Tours	9,9	83
9	Swim with Dolphins	9,9	56
10	Vespa, Scooters & Moped Tours	9,9	248
11	Outdoor activities	9,8	350
12	Scuba & snorkelling	9,8	2167
13	Surfing & Windsurfing	9,8	98
14	Waterskiing & Jetskiing	9,8	337
15	Boat Tours & Water Sports	9,7	2950
16	Day Trips	9,7	641
17	Horseback Riding Tours	9,7	104
18	Private Tours	9,7	2027
19	Spa & wellness	9,7	54
20	Stand Up Paddleboarding / SUP	9,7	377
21	Dolphin & whale watching	9,6	272
22	Ecotours	9,6	338
23	Kayaking & canoeings	9,6	590
24	Water Sports	9,6	433
Ranking	Attraction	Rating	Reviews
25	Fishing Charters & Tours	9,5	417
26	Nature & Wildlife tours	9,5	165
27	Parasailing & paragliding	9,5	238
28	Tours	9,5	1560
29	Gears Rentals	9,3	232
30	Self-guided tours & rentals	9,3	66
31	4WD, ATV & Off-Road Tours	9,3	298
32	Beach & Pool Clubs	9,2	266
33	Taxis & Shuttles	9,2	416
34	Transportation	9,2	377
35	Things To Do	9,1	489
36	Beaches	9,0	82
37	Sightseeing Tours	8,9	49
38	Shopping	8,8	93
39	Speciality & Gift Shops	8,8	93
40	Bar, Club & Pub Tours	8,3	70
41	Nightlife & night tours	8,3	70

This filtered ranking evidence that the top 10 attractions are the following:

- Bike Tours
- City Tours
- Cultural Tours
- Food & Drink
- Historical & Heritage tours
- Motorcycle tours
- Shark Diving
- Speed Boat Tours
- Swimming with Dolphins
- Vespa, Scooters & Moped Tours

3) Category: Restaurant



Ratings Comparison

Rating	Cleanliness	Facilities	Service	Food and Beverages	Value	Location	Ambience
Numerical Rating	-	-	9.2	9.1	8.6	-	9.3
Sentiment Rating	8.5	9.3	9.2	9.3	8.7	8.7	9.5
TES Score	-	-	9.2	9.2	8.6	-	9.4

Table 11: RATING

Ranking	KPI	Reviews	Ratio	Rating
1	overall	1933	57.1%	8,9
2	service	397	11.7%	9,2
3	value	396	11.7%	8,6
4	fnb	395	11.7%	9,1
5	ambience	263	7.8%	9,3

Ambience is considered the most valuable aspect of restaurant experiences in TCI (9,3), followed by service (9,2) and food & beverage (fnb 9,1).

The overall rating is an extremely high 8,9.

Table 12: COMPOSITION

Ranking	KPI	Reviews	Ratio	Rating
1	Couples	242	41.8%	9,3
2	Families	140	24.2%	9,0
3	Friends	67	11.6%	9,3
4	Other	64	11.1%	9,5
5	Group	52	9.0%	9,4
6	Solo	11	1.9%	8,0
7	Business	3	0.5%	10,0

The highest appreciation for the restaurant / gourmet experiences are expressed by business travellers (10), followed by groups (9,4), friends and couples (9,3). Families stand behind (9,0) and solo travellers are moderately satisfied (8,0).

Table 13: COUNTRY

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Annex E: Assessment of the online positioning of TCI as tourism destination

Ranking	KPI	Reviews	Ratio	Rating
1	United States	536	82.2%	9,1
2	Canada	56	8.6%	9,0
3	United Kingdom	14	2.1%	8,7
4	Jamaica	13	2.0%	10,0
5	Bonaire, Sint Eustatius and Saba	11	1.7%	10,0
6	France	4	0.6%	8,0
7	South Africa	4	0.6%	9,0
8	Italy	2	0.3%	10,0
9	Portugal	2	0.3%	7,0
10	Anguilla	1	0.2%	6,0
11	Australia	1	0.2%	10,0
12	Bolivia	1	0.2%	10,0
13	Brazil	1	0.2%	10,0
14	India	1	0.2%	2,0
15	Qatar	1	0.2%	10,0
16	Sweden	1	0.2%	8,0
17	Turks and Caicos Islands	1	0.2%	10,0
18	United Arab Emirates	1	0.2%	10,0
19	Western Sahara	1	0.2%	10,0

82% of reviewers are from the main source market US expressing an excellent 9,1 rating. Followed by 8.6% from Canada rating 9 and 2.1% from UK rating 8,7.

Some unrealistic ratings regard India 2, Anguilla 6, and Portugal 7.

Table 14: SOURCE

Ranking	KPI	Reviews	Ratio	Rating
1	Google	983	50.9%	8,8
2	TripAdvisor	650	33.6%	9,1
3	Open Table	263	13.6%	9,4
4	Yelp	35	1.8%	8,4
5	Facebook	2	0.1%	10,0

D16

Annex G



National tourism strategy and implementation plan for Turks & Caicos

Annex G – New types of accommodation

March 2023

ANNEX G: NEW TYPES OF ACCOMMODATION

To diversify the tourism supply chain and to attract new market segments, such as outdoor adventure and ecotourism, one or more islands of the Turks and Caicos should start developing and setting up new typologies of accommodation in line with the needs and expectations of the typical tourists of these segments.

A glamping is where glamorous accommodation meets traditional camping. Glamping offers accommodation and facilities that are luxurious compared to camping, to give travellers the best of both worlds.

According to Tents Xpert, the glamping market in the United States is expected to reach a revenue of about \$1 billion by 2024. And there's no sign of slowing down. According to Grand View Research, the glamping industry is projected to surpass \$5.4 billion by 2028 evidencing that the global glamping market size is huge.

This impressive growth is fuelled by travellers' desire to stay in unique accommodation, while still having access to amenities and services that are not necessarily provided by a traditional camping business.

Glamping is *not only limited to tents and caravans*: from treehouses to tiny houses, various types of accommodation are also regarded as glamping too. The following are some of the most common:

a) *Yurts*

A yurt is a round glamping tent that is made from fabric/animal skin and wooden beams. Originally from Mongolia, it has become a popular feature at festivals. Not only is it very accessible, but it can be jazzed up by including amenities like air conditioning — something that guests will welcome when they're out and about in the countryside.

b) *Tipis*

A tipi is a traditional, triangular native American tent. Nowadays, it is made from wooden beams and cotton fabric that are fastened with rope and has become a common sight at campsites. While it is similar to a yurt, a tipi is simpler and might not offer as much interior space for amenities.

c) *Treehouses*

Treehouses¹ are no longer just meant as a hideout for the neighbourhood boys. Today, it is also a popular type of glamping. Nature lovers appreciate its sustainable architecture (it is mostly made from wood) and enjoy how it gives them the chance to explore nature more intimately.

It is also an attractive option for hosts as it offers a long list of options and is quite versatile, like caravans.

d) *Tiny houses*

Tiny houses are currently all the rage. In short, they use limited space and resources making them extremely eco-friendly.

A tiny house is typically situated on a big plot of land and might even be built using ecological materials.

¹ <https://www.igms.com/glamping-business/>

e) Bubble domes

Bubble domes are basically transparent pods. It is a great option if a location is known for its mesmerizing sunrise, sunset, or starry sky.

f) Luxury glamping tents

Luxury glamping tents are generally made from canvas fabrics. Glamping tents combine practicality, good looks, and luxury. They offer the quintessential solution to establishing luxurious campsites in remote and fragile ecosystems. They are easy to transport, set-up and guarantee guests' comfort and spaciousness.

g) Eco-lodges

Eco-lodge refers to a type of accommodation located in a remote destination in nature.

Generally, eco-lodges are equipped with less than 30 rooms. They are designed to have minimal impact on the environment and to be as sustainable as possible in their usage of resources. Furthermore, they aim to improve the welfare of the local population by supporting local suppliers and workers. Eco Lodges in comparison to eco hotels and green hotels, are usually located further away from civilisation. They target eco-tourists, by offering a nature-based experience. Often, they are not impacted by noise, traffic, smog, or pollution.

h) Train carriages

An old train carriage can offer great accommodation to glampers. They are remodelled and adapted before they can be turned into an attractive vacation rental.

i) Caravans

A caravan is a mobile home that can be towed around by a vehicle, similar to a trailer. It is equipped with the essentials needed for living in and provides slightly more space and protection than a traditional tent. It is arguably its versatility that lies behind its popularity over the past couple of decades.

As it is more spacious than some of the other types of accommodation, it is relatively easy to add amenities to boost its appeal.

j) Eco-Pods

An eco-pod, or ecopod, is a small, self-contained, sustainably built structure. The clue is in the name:

- Eco – prefix, meaning connected to the environment.
- Pod – small, simple, self-contained structure, often rounded in shape.

Just like a real-life pod – whether it's a pea pod or space craft unit – an eco-pod usually has curved lines to mimic nature's original form. Almost all eco pods are timber clad on the outside to give it a natural look.

D16

Annex F



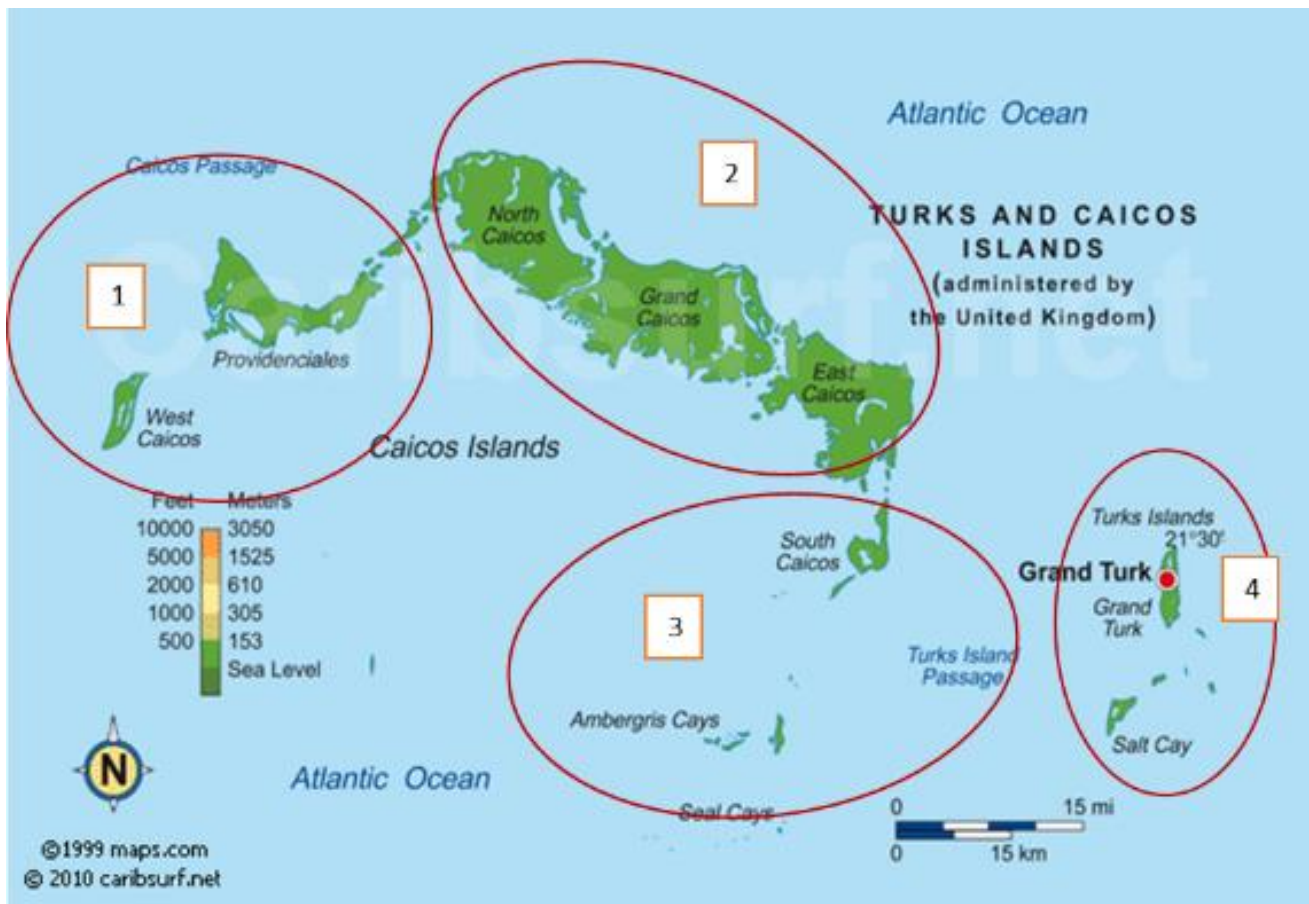
National tourism strategy and implementation plan for Turks & Caicos

Annex F –Tourism Products Portfolio

March 2023

Annex F: TOURISM PRODUCTS PORTFOLIO

TID 1: Providenciales / West Caicos / Mangrove Cay / Little Water Cay / Parrot Cay.....	3
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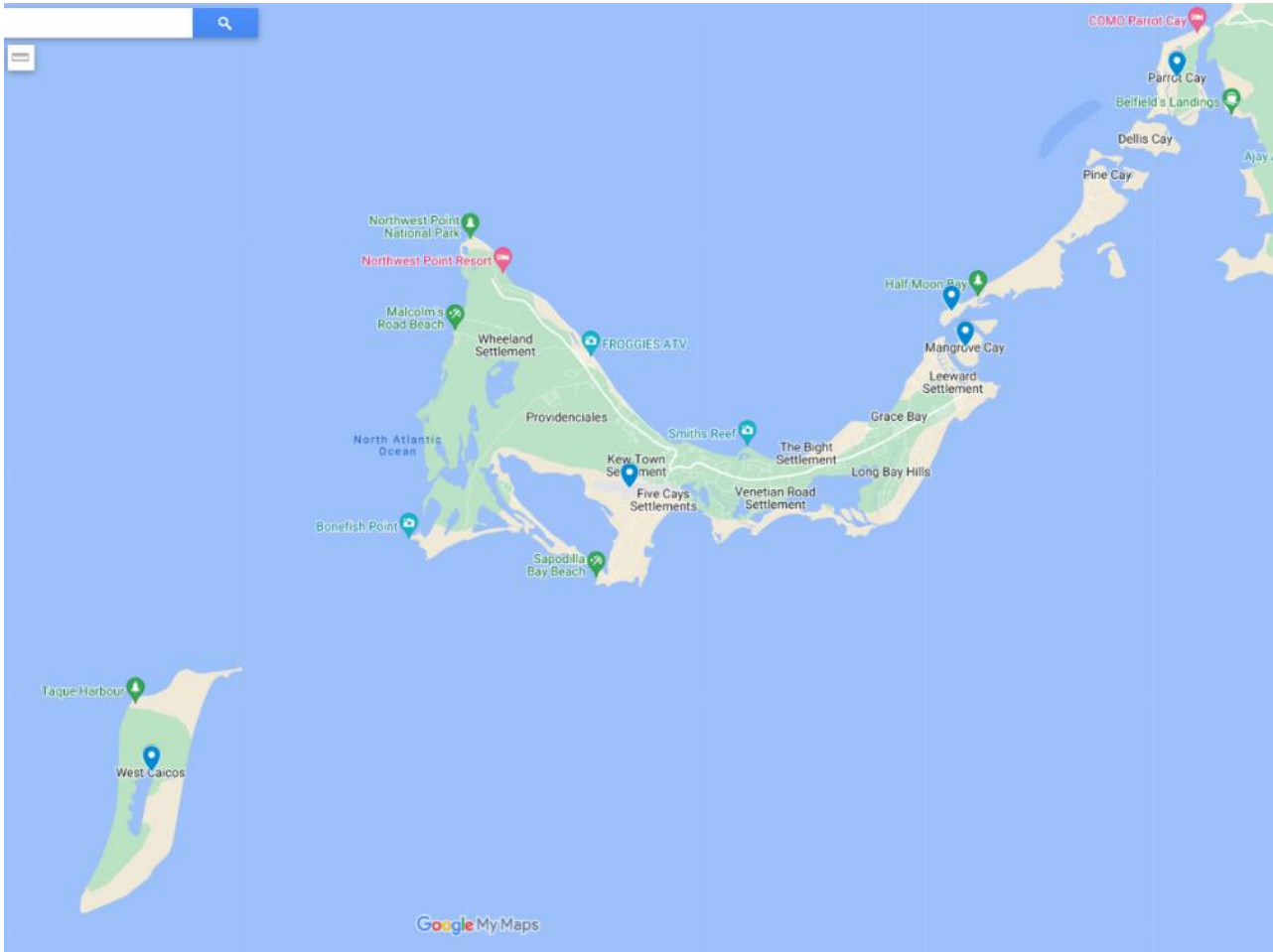


For each Tourism Improvement District (TID), Target Euro has identified 1 or 2 **PRIORITY** Tourism Products and other **SECONDARY** Products, either being already *developed* or with a *potential* for development.

TID 1: Providenciales / West Caicos / Mangrove Cay / Little Water Cay / Parrot Cay

This Tourism Improvement Districts (TID) totals over 30,000 inhabitants.

Figure 1: Map¹ of islands and cays which are grouped as TID 1



TOURISM PRODUCTS

This TID expresses many tourism products with different levels of potentiality.

A. PRIORITY Potential & Present Tourism Products:

PRIORITY Potential & Present Tourism Products in TID 1 are the following:

¹ Adaption created with My Google Maps

Destination 1 Specialisations

LUXURY

WATER SPORTS

A. LUXURY TOURISM

The priority tourism product LUXURY is based on a combination of **SIX (6)** products:

Providenciales: Priority Product

- A.1 Luxury sun & sea
- A.2 Shopping & Entertainment
- A.3 Boating & Yachting
- A.4 Foodies / culinary
- A.5 Golf
- A.6 Incentive

LUXURY



LUXURY SUN & SEA:
CONDOS & VILLAS-
BASED MODEL



SHOPPING &
ENTERTAINMENT



BOATING & YACHTING



GOURMET / FOODIES



GOLF



INCENTIVE

a.1 Sun & Sea

Glossary: Sun & Beach² tourism is one of the most popular types of tourism. Sun & Beach tourism is when which the physical beach landscape is a prominent element of the holiday. This will often encompass the traditional seaside and package holidays that are popular in Europe.

Real Estate and related tourism are booming in Turks and Caicos. Tourists staying in Condos and Villas purchased by international investors are the predominant form of sun & beach tourism in Providenciales.

a.2 Shopping & Entertainment

Glossary: Shopping tourism is the art of shopping during a person's travels or leisure time whilst on holiday. It can range from shopping at duty-free in the airport, to visiting street markets to shopping in large shopping malls. Shopping tourism may be the sole purpose of a person's trip, or it may be just one

² <https://tourismteacher.com/types-of-tourism-glossary/> Dr Hayley Stainton

component. In some parts of the world, it may include haggling for the best price, whilst in others the prize may be awarded only to the highest bidder, for example in an auction.

In TCI there are no high-end luxury brands and flagship/mono-brand stores on the island – such as Michael Kors, Gucci, Louis Vuitton - but a good offer of local fashion and quality handicraft.

a.3 Nautical tourism: Sailing, Boating & Yachting

Glossary: Nautical tourism combines sailing, boating, or yachting with vacation and holiday activities. It can be travelling from port to port or joining boat-centred events such as regattas or landing a small boat for lunch or other day recreation at specially prepared day boat-landings.

No superyacht (from 24 to 40 metres) and no megayacht (from 40 metres – 130 ft) for rent in Turks & Caicos. Very reduced also the number of yachts (10 to 24 metres).

Many resorts on Grace Bay offer complimentary Hobie Cat³ use for guests, and rentals are also available at a few different locations.

a.4 Culinary tourism: Foodies

Glossary: Culinary tourism refers to trips in which local cuisine plays an important role. It relates to the pursuit and enjoyment of unique and memorable food and drink experiences. Most culinary tourists and foodies are interested in local food culture, rather than gourmet⁴.

Providenciales has a good potential to explore and exploit better the potential tourist market of foodies / gourmet lovers.

a.5 Golf

Glossary: Golf tourism relates to trips undertaken by persons for which the main purpose is to play golf.

Only 18-hole course in the country: The Royal Turks and Caicos Golf Club (previously named the Provo Golf Club), located in the Grace Bay area (Grace Bay Road), Providenciales, is consistently rated among the top 10 golf courses in the Caribbean.

To attract the international golf markets, at least a second 18-hole course should be realized - possibly in Providenciales, alternatively on another island. Otherwise, golf will continue to be pursued in Turks and Caicos as a secondary activity (for example, someone on a beach holiday playing a round during their vacation).

a.6 Incentives

Glossary: The Incentives is part of the MICE segment composed by Meetings, Incentives, Conferences, Exhibitions (and Team Building), according to the International Association of Professional Congress Organizers (IAPCO). The Incentives part of MICE is the odd one out – though it is related to business, as it

³ Glossary: Hobie Cat are small and easy to sail unsinkable catamaran sailboats.

⁴ The World Food Travel Association (WFTA)

is usually provided to employees or dealers/distributors as a reward, it tends to be leisure based, unlike the other types of MICE which are mainly business trips.

Providenciales combined with other islands of Turks and Caicos is a perfect destination for this market segment as it can offer the “once in a lifetime experience” and luxury usually requested.

B. WATER-BASED SPORTS

Glossary: Water tourism is tourism which involves the use of natural or man-made water areas associated with leisure / sports activities that involve water sports.

The second priority product for TID 1 is based mainly on the huge variety of water-based sports and activities which are already offered in Providenciales:

B.1 Scuba diving / Deep Sea Diving

Glossary: Scuba diving tourism is based on servicing the requirements of recreational divers at destinations other than where they live. It includes aspects of training, equipment sales, rental and service, guided experiences.

The walls of Northwest Point and West Caicos are impressively sheer, Grace Bay offers fascinating spur and grove formations, and the wall off French Cay is home to some of the most impressive coral in the country.

Grey reef sharks are common at many barriers reef sites, and dolphins, manta rays, hawksbill turtles and leatherback turtles can be spotted as well.

B.2 Freediving

Glossary: Freediving is a sport that’s gaining wider recognition. Blurring the line between an extreme sport and an eco-activity, this sport utilizes a mask and fins like the common snorkelling set up.

The edge of the Caicos barrier reef makes for a spectacular playground, and with a little practice, it’s easy to dive down to depths of 30-40 feet.

Experiencing the reefs and wall with the simplicity of freediving is amazing.

Due to the associated dangers and risks, it’s recommended to receive professional instruction, and to have a rescue boat present when freediving

With some of the finest beaches in the Caribbean, it's no wonder that the Turks and Caicos excels as a water sports destination.

B.3 Snorkelling

Glossary: Snorkelling is a popular recreational activity, particularly at tropical resort locations. It provides the opportunity to observe underwater life in a natural setting without the complicated equipment and training required for scuba diving⁵.

Providenciales has some beach reefs where it's possible to snorkel from shore, yet generally, the best reefs are only accessible by boat.

The first four reefs below can be visited by land and are located close to the beach: The Bight Reef (Coral Gardens); Smith's Reef; Malcolm's Road Beach; Northwest Point Marine National Park.

Others require a boat charter or snorkelling excursion: Leeward Cut Reef; West Caicos Marine National Park; Turtle Rock; Mangrove Cay; Caicos Banks Reefs; The Grace Bay Reefs; Wiley Cut; Flamingo Creek Bay.

B.4 Kayaking / Canoeing

Glossary: As one of the easiest water sports to learn, almost anyone can be paddling with a kayak or canoe after a few minutes of practice.

For casual kayaking, most of the Grace Bay Beach resorts and beachfront rental villas have kayaks free for their guest use.

B.5 SUP / Stand-up paddleboarding

Glossary: SUP, also known as stand-up paddling, is an activity where people stand on a floating board and paddle themselves through the water. Supping is one of the fastest growing sports in the world⁶.

Most of the Grace Bay Beach resorts and beachfront rental villas have paddleboards free for their guest use.

B.6 Kiteboarding / Kitesurf⁷

Glossary: Kiteboarding or kitesurfing is a sport that involves using wind power with a large power kite to pull a rider across a water, land, or snow surface.

⁵ <https://en.wikipedia.org/wiki/Snorkeling>

⁶ <https://www.jobesports.com/en/newsflash/what-is-suping-1375/>

⁷ There are currently no laws or regulations against kiteboarding on any beaches in the country. Due to the spectacular setting and safe environment, any kite newcomers to the Turks and Caicos should start at Long Bay Beach, regardless of skill level. <https://www.visittci.com/north-caicos-middle-caicos/things-to-do/kiteboarding>

Best spots on Providenciales: Long Bay Beach⁸, Leeward Going Through⁹, Grace Bay Forbes Point¹⁰, The Bight Beach¹¹.

“Windvibes: The Best Kiteboarding Festival in the Caribbean” was organized in Turks & Caicos until a couple of years ago. The Annual Windvibes Water sports Tournament was held on Long Bay Beach, Providenciales.

B.7 Jet ski

Glossary: Jet Ski is used generically to refer to any type of personal watercraft used mainly for recreation.

Providenciales is the best place to be in the Turks and Caicos for jet skiing, due to the wide range of rental companies. There’s a great collection of sights to visit via jet ski from Providenciales, especially off the southern coast of the island.

B.8 Windsurfing

Glossary: Windsurfing is a wind propelled water sport originating in the 1960s that is a combination of sailing and surfing.

This water sport is still an excellent way to get out on the beautiful waters of the Turks and Caicos. A few resorts and some villas on Providenciales provide complimentary windsurf equipment use for guests.

B.9 Surfing

Glossary: Jet Ski is used generically to refer to any type of personal watercraft used mainly for recreation. Surfing is a surface water sport in which a surfer uses a board to ride on a moving wave of water, which usually carries the surfer towards the shore.

The barrier reefs off of the north and west coasts of Providenciales does offer some decent breaks at times, but unfortunately, it’s not entirely predictable when conditions will be suitable.

A small beach break with a clean sandy bottom can be found close off the beach in the Leeward Beach area, but due to the small size of the waves the spot is typically suitable only for stand-up paddleboard surfing.

⁸ Long Bay Beach is the best kiting spot on Providenciales. The Turks and Caicos typically gets an east-southeast wind, which Long Bay is directly exposed to.

⁹ Leeward Going Through at the northeast point of Leeward Beach can be good for those who like to explore, as many small cays and coves can be found to the east.

¹⁰ Due to the typical east-southeast winds, Grace Bay usually isn’t the best beach for kitesurfing. The best kiting spot in the area is found off the Grace Bay Forbes Point access next to the Sands Resort.

¹¹ As with Grace Bay Beach, wind will typically be offshore at the Bight Beach, although due to lower building density wind obstructions are less of a problem.

B.10 Parasailing

Glossary: Parasailing, also known as parascending, paraskiing or parakiting, is a recreational kiting activity where a person is towed behind a vehicle while attached to a specially designed canopy wing that resembles a parachute, known as a parasail wing.

Parasailing is available in the Grace Bay Beach region of Providenciales and is an exciting way to experience a birds-eye view of the turquoise ocean water, the beaches, resorts, and tour boats below.

B.11 Wakeboarding

Glossary: Wakeboarding is a water sport in which the rider, standing on a wakeboard (a board with foot bindings), is towed behind a motorboat across its wake and especially up off the crest.

The best locations close to Providenciales are usually off the east side of the island in the Princess Alexandra National Park at Donna Cay and Little Water Cay, or off the north of Half Moon Bay and Water Cay. The southwest coast of Providenciales near Sapodilla Bay and Taylor Bay can also have decent conditions at times, as well as the beautiful Grace Bay.

B.12 Semi-submarine

Glossary: Glass-bottom or semi-submarine boat cruise can be the perfect way to see the vibrant reefs and fascinating ocean life.

Several charter boats in the Turks and Caicos feature some type of “glass bottom” window or viewing port.

B.13 Tubing / Banana boat

Glossary: A banana boat (or water sled), is an unpowered, inflatable recreational tube ride towed behind a powerboat. Tubing is generally popular at the beaches.

These kind of short boat rides are possible from Grace Bay Beach, the Bight Beach, Leeward Beach, Half Moon Bay, and Water Cay.

B.14 Swimming

The contiguous north Providenciales coasts of Grace Bay Beach, Leeward Beach, and the Bight Beach are incredible locations for swimming. Sheltered by the northern Caicos barrier reef, these sites offer gentle depths increases off the beach to about 12-25 feet (4-8 meters) in the central bay. The clear and generally calm waters allow swimmers to see fascinating marine life, including stingrays, barracudas, and, on occasion, dolphins.

B.15 Snuba

Glossary: Snuba is often referred to as hookah diving and is a fun and interesting way to explore shallow reefs. This unique water sport combines elements of both snorkelling and scuba diving yet is easy to participate in and doesn't require the certification and training that scuba diving does. The typical snuba

setup consists of a conventional scuba tank that floats on a small raft on the surface, and a long air-line that the diver uses. The diver will usually have fins, a weight belt, and snorkel mask, and can move in any direction underwater with quite a bit of freedom. Each diver is independent of other divers. The primary benefits of snuba over snorkelling is the ability to explore greater depths. There's typically a tremendous array of tiny and interesting sea creatures to see, many of which are highly proficient in hiding. Simply having the ability to spend time 10-15 feet (3-4.5 m) below the surface at a reef will allow for great and unexpected sightings. Snuba is very easy to master, and children as young as eight can participate.

Snuba is regularly offered at the beach near the Bight Reef in central Providenciales. Snuba Turks and Caicos, the primary snuba company on the island, also has a dive boat for offshore adventures.

The offshore barrier reef of the Princess Alexandra National Park that protects Grace Bay Beach offers a contrasting atmosphere to the beach reefs, with more complex reef structure, clearer blue water, yellow and purple sea fans that sway with the ocean swell, and the chance to spot larger creatures such as Caribbean reef sharks.

B.16 E-Foiling

Glossary: Efoil, short for Electric Hydrofoil, is an electric powered motorized surfboard, allowing riders to fly above the crystal-clear waters in Turks and Caicos¹².

Leeward Beach near Leeward Going Through, Sapodilla Bay Beach, and Turtle Tail Beach are great spots as they tend to often be very calm and sheltered from the typical east-southeast trade winds.

B.17 Subwinging

Glossary: Subwinging is a funny water sport that's suitable for snorkelers that are comfortable in the water. Basically, the activity consists of a rider being dragged at slow speed underwater behind a boat while holding onto a small-winged board. The wings can swivel in the centre, allowing the rider to dive up and down, spin, and steer from side to side.

The barrier reef that fronts Grace Bay and the Caicos Cays is one of the best places to subwing, as there are miles of beautiful fringe reef to explore. As you glide along, you'll see vibrant corals, yellow and purple sea fans, arches, small caves, gullies, and colourful reef fish.

Another simpler yet equally beautiful settings are the bays between the barrier reef and the beach near Grace Bay, Water Cay, and Pine Cay. In these areas the depths are about 15 feet (5 m) and there's not much to see other than crystal-clear ocean water and the sandy ocean floor.

B.18 Flyboarding

Glossary: This activity offers an unforgettable "jetpack" experience and allows the user to soar up to 30 feet (9 m) above the water. Flyboarding equipment consists of a shoulder, hoverboard, or boot mounted propulsion pack, and is powered by a jet ski's engine and impeller drive system. The Flyboard essentially

¹² <https://flytci.tc/>

diverts the flow of water from the jet ski propulsion system through a hose setup to the pack that the user wears, and the force of this water is sufficient to provide lift to the rider.

Flyboarding is a new and exciting water sport on Providenciales.

Leeward Channel, near the Heaving Down Rock area of Providenciales, is the primary spot for flyboarding.

As jet ski use is prohibited in national parks and nature reserves in the Turks and Caicos, flyboarding is not permitted at the popular Grace Bay Beach or the Bight Beach, as these coasts are part of the Princess Alexandra National Park.

B.19 Sea scootering

Glossary: Sea scooters, also known as underwater scooters, or diver propulsion vehicles (DPVs), are small battery powered submersible motorized tugs which can tow snorkelers and swimmers at speeds of 2-4 MPH (3-6 KPH). Underwater scooters are very easy-to-use, both on the water's surface and below. It typically takes only a few minutes of practice to become comfortable in the water. Users have two handles to hang on to, and a simple throttle trigger turns on the device and controls speed. Users wear regular snorkel masks and fins.

On Providenciales, sea scooter rentals are available at both Smith's Reef and the Bight Reef (also known as Coral Gardens).

B. SECONDARY Potential & Present Tourism Products:

Secondary Potential & Present Tourism Products in TID 1 are the following:

- | |
|---|
| <p>C. Shark Watching
 D. MICE tourism
 E. Event Tourism
 F. "Soft" Ecotourism
 G. Fishing tourism</p> |
|---|

C. Shark watching

<p><i>Glossary:</i> Shark watching is a form of tourism which involves sharks. It tends to centre around the conservation of sharks and is often considered a form of ecotourism. Popular activities include taking boat trips to areas where sharks can be observed, either from the deck, or from inside a cage that is lowered under the water, known as shark cage diving.</p>
--

This form of tourism is **NOT** offered yet but could have a high potential for the Providenciales typologies of clientele.

D. MICE tourism

<p><i>Glossary:</i> The MICE segment is composed by Meetings, Incentives, Conferences, Exhibitions (and Team Building), according to the International Association of Professional Congress Organizers (IAPCO).</p>

Providenciales is the only island equipped to host larger conferences. In addition, all international flights arrive here so it's the logical island choice. Most resorts and the primary conference hall location choices are in Grace Bay on Providenciales.

E. Event Tourism

<p><i>Glossary:</i> Corresponds to the design, development, and marketing of planned events as tourist attractions.</p>

Event Tourism in TID 1 addresses:

- Music events based on festivals, such as the Caribbean House Evolution music festival.
- Cultural events, such as the TCI Food and Culture Festival in Providenciales, the Caribbean Food and Wine Festival, the Maskanoo¹³ and the Conch Festival.

¹³ Maskanoo is a street festival held on Boxing Day (Dec 26) and combines elements of masquerades and traditional Bahamian-style Junkanoo.

F. “Soft” Ecotourism¹⁴

Glossary: Holidays to places of natural beauty in a way that helps local people and does not damage the environment.

Turks and Caicos’ tourism businesses have implemented multiple policies to offer the remarkable experiences presented by the destination without the environmental impacts. For example, Big Blue Collective, a popular tour operator on Providenciales is the first company to decrease their overall footprint with quieter and less polluting four-stroke motors; excursions via power catamarans; the elimination of single use plastics such as bottles, cups, and plates from their tours; and a requirement for reef-safe sunscreen on all trips.

Green Resorts

To support the destination’s sustainability goals, many hotels and resorts have enacted their own eco-initiatives. West Bay Club has its own waste treatment system, and recycles grey water for landscaping purposes; each room at Wymara Resort¹⁵ is equipped with an Energy Management System through which electricity is turned on via each guest’s room key; COMO Parrot Cay has its own banana and coconut plantations, where guests of all ages can plant their own trees and learn about the native fauna and flora; and Pine Cay has implemented a no-car policy on the island, and swapped individual plastic toiletry bottles for refillable dispensers. The recently opened Ritz-Carlton is also turning a focus on electric vehicles, partnering with Fortis to install eight charging stations, which will be free to all members of the community. The resort plans to strictly offer electric vehicles come 2024.

Eco-Friendly Policies

The Turks & Caicos government has taken steps to instil eco-friendly laws that all establishments must adhere to, including banning the use of plastic straws, Styrofoam products, plastic bags, cars over 10 years old, and more.

¹⁴ According to the UNWTO's definition, ecotourism refers to forms of tourism which have the following characteristics:

- 1) All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas.
- 2) It contains educational and interpretation features.
- 3) It is generally, but not exclusively organised by specialised tour operators for small groups. Service provider partners at the destinations tend to be small, locally owned businesses.
- 4) It minimises negative impacts upon the natural and socio-cultural environment.
- 5) It supports the maintenance of natural areas which are used as ecotourism attractions by:
 - Generating economic benefits for host communities, organisations and authorities managing natural areas with conservation purposes.
 - Providing alternative employment and income opportunities for local communities.
 - Increasing awareness towards the conservation of natural and cultural assets, both among locals and tourists.

¹⁵ <https://wymararesortandvillas.com/wp-content/uploads/The-Turks-Caicos-Islands -An-Eco-Friendly-Destination-Recommend.pdf>

Preservation of Wildlife

Through its enactment of a Protected Areas system, the Department of Environment and Maritime Affairs (DEMA) ensures the protection and promotion of biodiversity throughout the islands. In fact, the destination has one of the most extensive Protected Areas systems in the Caribbean, with 35 Protected Areas, including National Parks, Nature Reserves, Sanctuaries, and Areas of Historic Interest.

Within these areas, activities that are harmful—such as fishing and collecting of those interested in ecotours, Little Water Cay, also referred to as “Iguana Island” is an excellent location for viewing the endemic Rock Iguanas in their protected, natural habitat, and Flamingo Pond, where flamingos flock sometimes in the thousands is protected as part of the Mansar Natural Reserve but can be seen from an overlook by tourists.

G. Fishing tourism

Glossary: Is tourism developed by fishermen who go to destinations where superficial fluvial resources - sea, lakes, dams, rivers, among others - are home to fish populations that provide an experience in contact with nature. Fishing is broadly split into three categories: game, coarse, and sea fishing¹⁶.

TC islands offer the perfect setting for several types of sport fishing. The Atlantic depths and great deep-sea fishing is only minutes away. The shallow and turquoise Caicos Banks also support incredible bonefishing, and TCI has extensive barrier reefs for bottom fishing. There’s a wide array of fishing tour and charters to choose from across the islands.

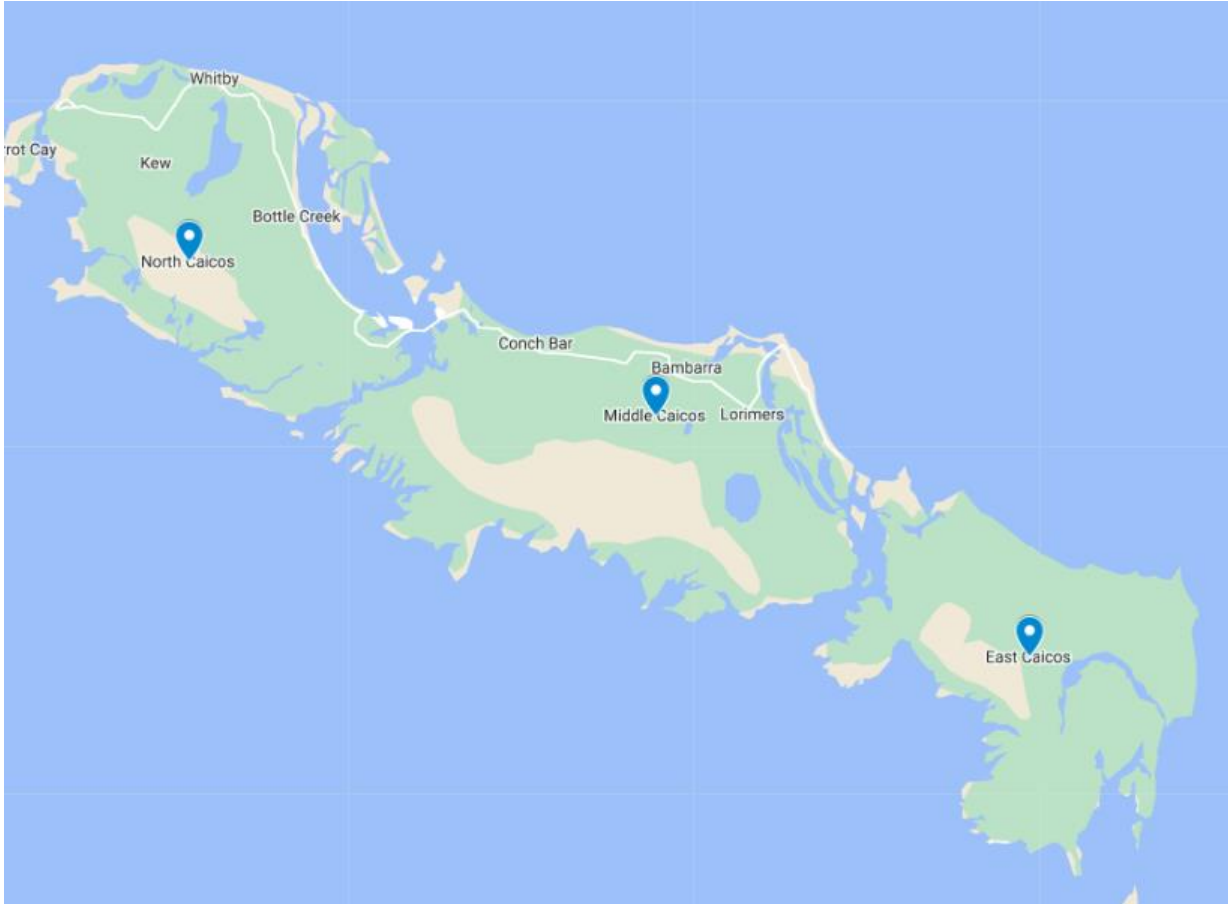
Providenciales is the centre for the excellent sport fishing found in the Turks and Caicos. Every year, several tournaments take place here, from the international Caicos Classic deep-sea billfishing event to many smaller reef and bottom fishing contests. Amazing world-class bone fishing is also found on the Caicos flats surrounding Providenciales.

¹⁶ [https://link.springer.com/referenceworkentry/10.1007/978-3-319-01669-6_602-1#:~:text=Fishing%20tourism%20can%20be%20defined,fishing%20vessels%20\(MAREMED%202013\)](https://link.springer.com/referenceworkentry/10.1007/978-3-319-01669-6_602-1#:~:text=Fishing%20tourism%20can%20be%20defined,fishing%20vessels%20(MAREMED%202013))

TID 2: North Caicos / Middle Caicos / East Caicos

This Tourism Improvement Districts (TID) totals around 2,700 inhabitants.

Figure 2: Map¹⁷ of islands and cays which are grouped as TID 2



TOURISM PRODUCTS

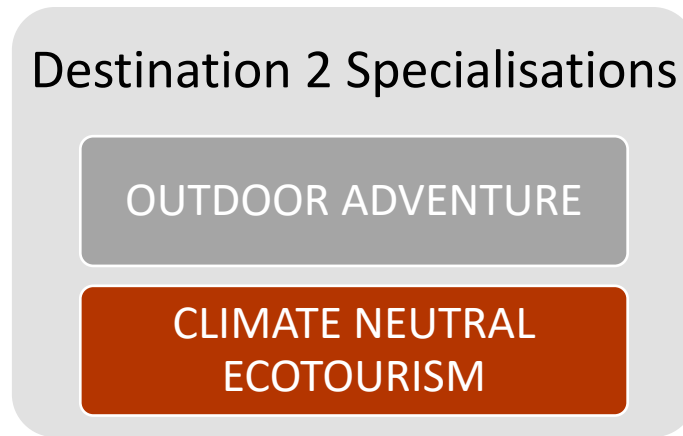
The feasibility of the development of the tourism products of TID 2 totally depends on a crucial variable: the **STATUS QUO** scenario vs. the **ALTERNATIVE** scenario:

- The **STATUS QUO SCENARIO** refers to the present situation of connections between Providenciales and North Caicos, based on water-based connections (boats...) and, possibly, private aircrafts.
- The **ALTERNATIVE** scenario is based on the creation of a land-based connection through a highway connecting at first Providenciales with North & Middle Caicos, then Middle Caicos with East Caicos and, finally, East Caicos with South Caicos. Following a Florida Keys-style development, this scenario would radically change the tourism development model of North & Middle Caicos as it probably would follow the already existing successful model of Providenciales.

¹⁷ Adaption created with My Google Maps

1. PRIORITY Potential & Present Tourism Products:

PRIORITY Potential & Present Tourism Products in TID 2 are the following:



A) OUTDOOR ADVENTURE

The priority tourism product **OUTDOOR ADVENTURE** is based on a combination of **FIVE (5)** products in the *status quo* scenario for North & Middle Caicos:



The element in common of these products is that they are addressed to tourists in search for enjoying open air land activities, sports, and accommodations.

a.1 Hiking, trekking

Glossary: Trekking holidays focus on holidays where trekking is the main purpose. A trek is a long (multiple day) adventurous trip on foot through remote destinations that are, in most cases, inaccessible and unknown to the visitor and in areas where common means of transport are generally not available. Trekking is considered a form of adventure tourism.

The Turks and Caicos has countless amazing coastal hiking locations; however, dedicated trails are lacking. North Caicos and Middle Caicos offer the top hikes.

a.2 Birdwatching

Glossary: Birdwatching or “birding” tourism refers to travel where the main purpose is to observe birds in their natural habitat. Birdwatching refers to finding, observing, and identifying birds for educational and enjoyment purposes. It is very much related to nature tourism, ecotourism, and adventure tourism.

Birding is another great nature activity. Saline ponds and mangrove channels are common throughout North & Middle Caicos. Inside these beautiful environments are an impressive array of wildlife. E.g., at Montpeller Pond Flamingos and Clapper Rails can be found.

a.3 Cycling / biking

Glossary: Bicycle tourism can encompass many things and can be defined as “any travel-related activity for the purpose of pleasure which incorporates a bicycle¹⁸.” Bike tourism can include road, gravel, and mountain biking.

To attract the new market segments related to outdoor adventure and ecotourism, North & Middle Caicos should start renting electric bicycles / e-bikes and setting up a network of recharging stations, as this new modality of biking is enlarging this market to additional segments that before were less interested to biking tourism (example: baby boomers, etc.). In fact, according to the UNWTO “Global Report on Adventure Tourism”, biking tourism is growing very fast worldwide, with an increasing number of adventure tourists embarking on both road and mountain biking tours or participating in cycling events.

The state of the roads, the very low traffic density in these 2 islands, and the many possibilities of off-road biking, makes North & Middle Caicos an ideal destination for biking tourism.

a.4 Off-Road exploring

Glossary: Off-roading tourism is related to experiences that the tourists perceive as heightened in value using ATV 4WD vehicles and motorbikes.

For visitors wanting a bit excitement and to discover wild side of the islands, is to rent a 4x4 jeeps / ATV in North and Middle Caicos and explore the back roads and lesser-travelled trails. Now no guided ATV and buggy tours are offered on the twin islands, differently from Providenciales and Grand Turk. No offroad motorbikes are for rent current in North & Middle Caicos.

Off Road Driving is a form of Adventure Tourism that experienced rapid growth in the last few years. Mainly due to an increase in wealth and in tourist desire to experience adventure activities during times of recreation, this form of adventure activity with the use of Off-Road Vehicles can offer significant importance in gaining public attention and in increasing tourism flows.

¹⁸ Path Less Pedaled

a.5 Glamping

Glossary: A glamping is where glamorous accommodation meets traditional camping. Glamping offers accommodation and facilities that are luxurious compared to camping, to give travellers the best of both worlds.

To attract the new market segments related to outdoor adventure and ecotourism, North & Middle Caicos should start developing and setting up new typologies of accommodation in line with the needs and expectations of the typical tourists of these segments. These accommodations should be inspired by a “glamping” style, such as Yurts¹⁹, Treehouses²⁰, Eco-lodges²¹, Eco-Pods²² and Luxury glamping tents²³.

B) CLIMATE NEUTRAL ECOTOURISM

The priority tourism product **CLIMATE NEUTRAL ECOTOURISM** is based on a combination of **FIVE (5)** products in the *status quo* scenario:



Glossary: ecotourism is responsible travel to natural areas that educates and inspires through interpretation— increasingly paired with practical action—that helps conserve the environment and sustain the well-being of local people. Ecotourism is the fastest-growing segment of the travel and tourism industry, and its economic value is projected to exceed USD\$100 billion by 2027.

The not inhabited East Caicos offers a high potential for becoming a **unique climate neutral / zero impact ecotourism destination** for the following reasons:

¹⁹ A yurt is a round glamping tent that is made from fabric/animal skin and wooden beams.

²⁰ Today, treehouses are a popular type of glamping.

²¹ Eco-lodge refers to a type of accommodation located in a remote destination in nature.

²² An eco-pod, or ecopod, is a small, self-contained, sustainably built structure.

²³ They offer the quintessential solution to establishing luxurious campsites in remote and fragile ecosystems.

- The old railroads trail is some 14 miles (22.5 km) in extent²⁴.
- 1000s wild donkeys
- Flamingos
- Unique birds (Cuban crows, West Indian whistling ducks, Bahamas woodstar hummingbirds, warblers, mangrove cuckoos, several types of herons and egrets, and ospreys) / birding
- Reptiles and snakes / land wildlife watching
- Sea wildlife watching; whales, dolphins, sting and eagle rays, starfishes.
- Opportunities for hiking / trekking (only with expert guides).

- East Caicos' Unique Selling Position as a unique climate neutral / zero impact ecotourism destination should focus on:
 - Energy & waste passive cottages (zero impact)
 - Specialized ecotourism guides
 - Hybrid or full electric motors driven boat connections (from Middle and South Caicos)

2. SECONDARY Potential & Present Tourism Products:

Secondary Potential & Present Tourism Products in TID 2 are the following:

- | |
|---|
| C. Sun & Sea |
| D. Water sports |
| E. Photography |
| F. Cultural tourism: Historical Plantations tourism |
| G. Fishing tourism |

C. Sun & Sea

- Relax in an uncontaminated natural habitat in North & Middle Caicos.
- East Caicos' north and east coasts are almost completely beach, collectively over ten miles (16 km).

²⁴ The island of East Caicos once had a network of railways some 14 miles (22.5 km) in extent, with wagons conveying sisal from the plantations to the quay at Jacksonville. It was reported active in 1912. Initially drawn by mules, steam locomotives were later introduced. After sisal production ceased, town and railway were abandoned, and the island became uninhabited. The island may be visited today, and ruins of Jacksonville are much in evidence and the railway line can be clearly followed on the ground.

<https://www.sinfin.net/railways/world/uk/turks+caicos.html>

D. Water sports

D.1 Kayaking

The extensive wetlands and shallows found on their southern coasts make for some of the best kayaking in the Turks and Caicos.

Kayaking on North and Middle Caicos can generally be split into two categories: casual trips of less than a few hours long, and more strenuous half and full day and overnight expeditions.

D.2 Stand-up paddleboarding / SUP

The Bottle Creek is the most popular paddle sports spot on North and Middle Caicos, mainly due to ease of access. Here, a shallow wide lagoon separates North Caicos from the nature sanctuary of East Bay Islands National Park.

D.3 Kiteboarding / Kitesurf

North Caicos and Middle Caicos offer a huge array of locations for the skilled kiteboarder:

Cedar Point and the long Wild Cow Run beach, one of the nicest kite spots on North Caicos and Middle Caicos, is unfortunately quite remote.

Bambarra Beach, one of the more sheltered beaches on the two islands, is another location to consider.

Due to being quite close to the barrier reef, the highly scenic beach at Mudjin Harbour often has a swell and some waves.

E. Photography

Glossary: Photographic tourism is that form of special interest tourism in which tourist visits a particular place with the primary aim of photographing subjects that are unique to them. The scope of photography may range from landscapes, portraits, architectures, culture, food, and wildlife to even macro subjects.

North and Middle Caicos are an excellent destination for tourists with passion for outdoor photography.

F. Fishing

Some of the finest bonefishing and flats fishing sites on the region are hidden in the countless channels and estuaries of the two islands North & Middle Caicos.

G. Plantation tourism

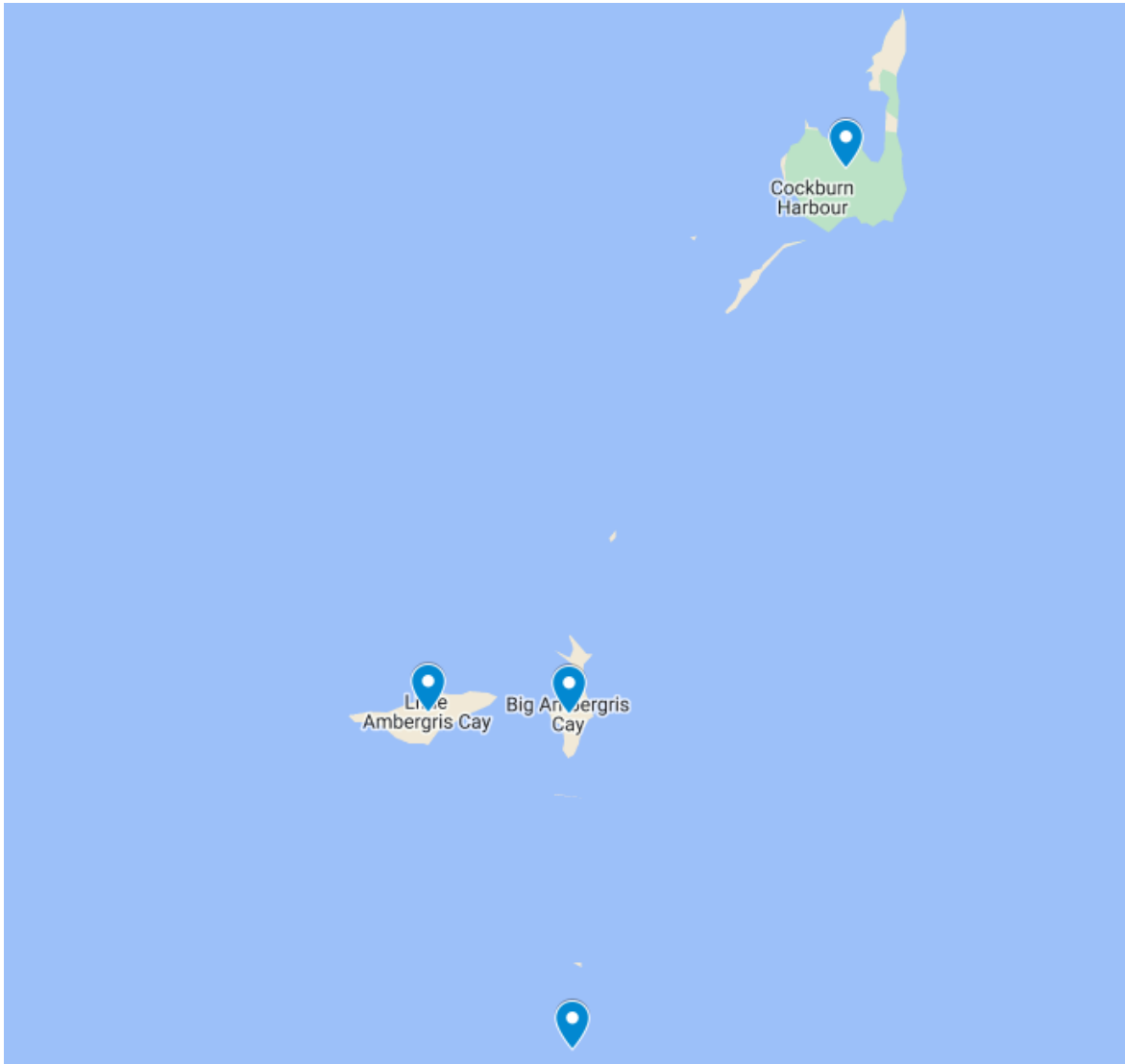
Glossary: Cultural tourism based on Historical Plantations are an interesting market niche but also including lots of controversies. Therefore, it should be approached critically and should not ignore the past. Plantations should be used to educate the public about the horrors endured by slaves and focus on telling the stories of slavery and memorializing those who have suffered on plantations.

North Caicos and Middle Caicos were home to quite a few cotton and sisal plantations in previous centuries. Two such historical attractions are open for tourism: Wade's Green Plantation and Haulover Plantation.

TID 3: South Caicos / Big Ambergris Cay / Little Ambergris Cay / Seal Cays

This Tourism Improvement Districts (TID) totals around 1,200 inhabitants.

Figure 3: Map²⁵ of islands and cays which are grouped as TID 3



TOURISM PRODUCTS

This TID expresses many tourism products with different levels of potentiality.

²⁵ Adaption created with My Google Maps

1. PRIORITY Potential & Present Tourism Products:

PRIORITY Potential & Present Tourism Products in TID 3 are the following:



A. FISHING TOURISM

The priority tourism product FISHING is South Caicos based and includes various typologies of fishing:

South Caicos



Glossary: fishing tourism is defined as tourists who travel for the purpose of sports fishing. There are two groups of fishing tourists. The first group are those who will take a half day or full day out to fish during their holidays and the second group are avid anglers whose main purpose of travel is to fish.

Fishing tourism In South Caicos. Ever since the end of the sea salt industry in the mid-1900s, small-scale commercial fishing has been the mainstay of the South Caicos economy. The nearby Turks Islands Passage and several marine banks offer great potential for sport fishing²⁶.

A variety of sports fishing is organised and offered to tourists:

A.1 Bonefishing

As is increasingly being known, the extensive Caicos Banks shallows offer some of the finest saltwater flats-fishing in the region. South Caicos is ideally situated to access these excellent fishing sites. Bonefish, tarpon, and barracuda are plentiful. Due to the very shallow depths at many sites, fan boats are best suited for the conditions.

A.2 DIY Fishing

There are several viable spots for shore bonefishing as well. The regions of Bell Sound north of Cockburn Harbour are outside of the national park is accessible and decent. The flats west of the abandoned US Coast Guard's LORAN base should also be considered.

A.3 Reef and Bottom Fishing

The pursuit of edible snappers, groupers and jacks has always been both a necessity and a pastime on South Caicos. Excursion options do exist yet are still a bit limited. Multiple day packaged can be arranged and offer greater value.

A.4 Shore Fishing

During calm weather and ocean conditions, Highlands Bay and Valley Bay Beach is a great shore fishing spot. Plandon Cay Cut Beach can offer great conditions at times as well.

A.5 Deep Sea Sport Fishing

As the tourism industry on South Caicos is quite limited, deep-sea sport and bill fishing has never caught on. Conditions are prime, yet it is necessary to make the short island hop by plane to either Providenciales or Grand Turk to find a properly outfitted water sports operator.

B. DIVING

World level scuba diving in South Caicos as the island is a deep-sea diving excellence due to the combination of the reef bordering with Columbus passage (Atlantic Ocean). Jacques Mayol: The famous French diving legend and holder of many world records in free diving lived in Bell Sound, South Caicos.

- Located on the east edge of the Caicos Islands subterranean plateau, South Caicos is recognized as having excellent diving, with vibrant reefs and wildlife, some decent wall sites, and many canyons, arches, and swim-through reef sites. The best of the accessible wreck sites, the Convair CV-440, is located nearby.

²⁶ <https://www.visittci.com/south-caicos/things-to-do/fishing>

- Most of the South Caicos dive sites are a short 10–15-minute boat trip out. Nearly all the main South Caicos Dive sites are in the Admiral Cockburn Land and Sea National Park, which includes Long Cay, Six Hills Cays, and Middleton Cay.
- Reef Divers at East Bay Resort is the only business based on South Caicos that provides scuba diving.

C. LUXURY

- AMBERGRIS CAY is an exquisite private island also known as Big Ambergris Cay, has a land mass of about 1000 acres (404 hectares). Ambergris Cay is lightly developed, and supports luxury vacation homes, an airport, and the all-inclusive and upscale Ambergris Cay Resort, which offers beautiful villa accommodations with impeccable service, dining, and amenities.
- Luxury secluded retreat Sailrock Resort in South Caicos.

2. Other SECONDARY Potential & Present Tourism Products:

Other Secondary Potential & Present Tourism Products in TID 3 are the following:

- | |
|---------------------------------|
| C. Boating & Sailing |
| D. History of the Salt Industry |
| E. Sun & Sea |
| F. Bird watching |
| G. Whale watching |
| H. Shark watching |
| I. Ecotourism |

C. Boating & Sailing:

- The “Big South” Regatta of South Caicos. The annual South Caicos Regatta, one of Turks and Caicos Islands’ oldest festivals was commenced following a royal visit by Her Majesty Queen Elizabeth the second who was then accompanied by His Royal Highness the Duke of Edinburgh Prince Phillip on February 25th, 1966. The 55th annual South Caicos Regatta took place May 27th – 28th 2022.

D. History of the Salt Industry

- Much remains of the salt industry on South Caicos. Most of these ruins are the low simple walls that divide up the salinas, yet complex gate and sluice arrangements can also be seen. Some notable features still standing are the Boiling Hole on South Caicos.

E. Sun & Sea

- Barefoot luxury and accessible priced. East Bay Resort.

- “Low cost” accommodation such as Jolly Villas guesthouse.

F. Birding / bird watching

- The central salt salinas on South Caicos offer great birdwatching opportunities, and relatively approachable flamingos can usually be seen, along with herons, egrets, and smaller coastal birds.
- The scenic coastal environments of The Highlands and Plandon Cay Cut are great for birdwatching, yet it’s hard to do better than the central salinas when seeking flamingos.
- Little Ambergris Cay is quite important as a wildlife haven for bird and marine life.
- Bush Cay (Seal Cay Sanctuary) typically offers great birdwatching.

G. Whale watching

- Bush Cay (Seal Cay Sanctuary) is an excellent location for humpback whale watching during the winter months.

H. Shark watching

- French Cay (Seal Cay) is known to be one of the best places to see sharks in the Turks and Caicos. Gray reef sharks are the most common variety, yet nurse, hammerhead, bull, lemon, and tiger sharks can be spotted at times as well.

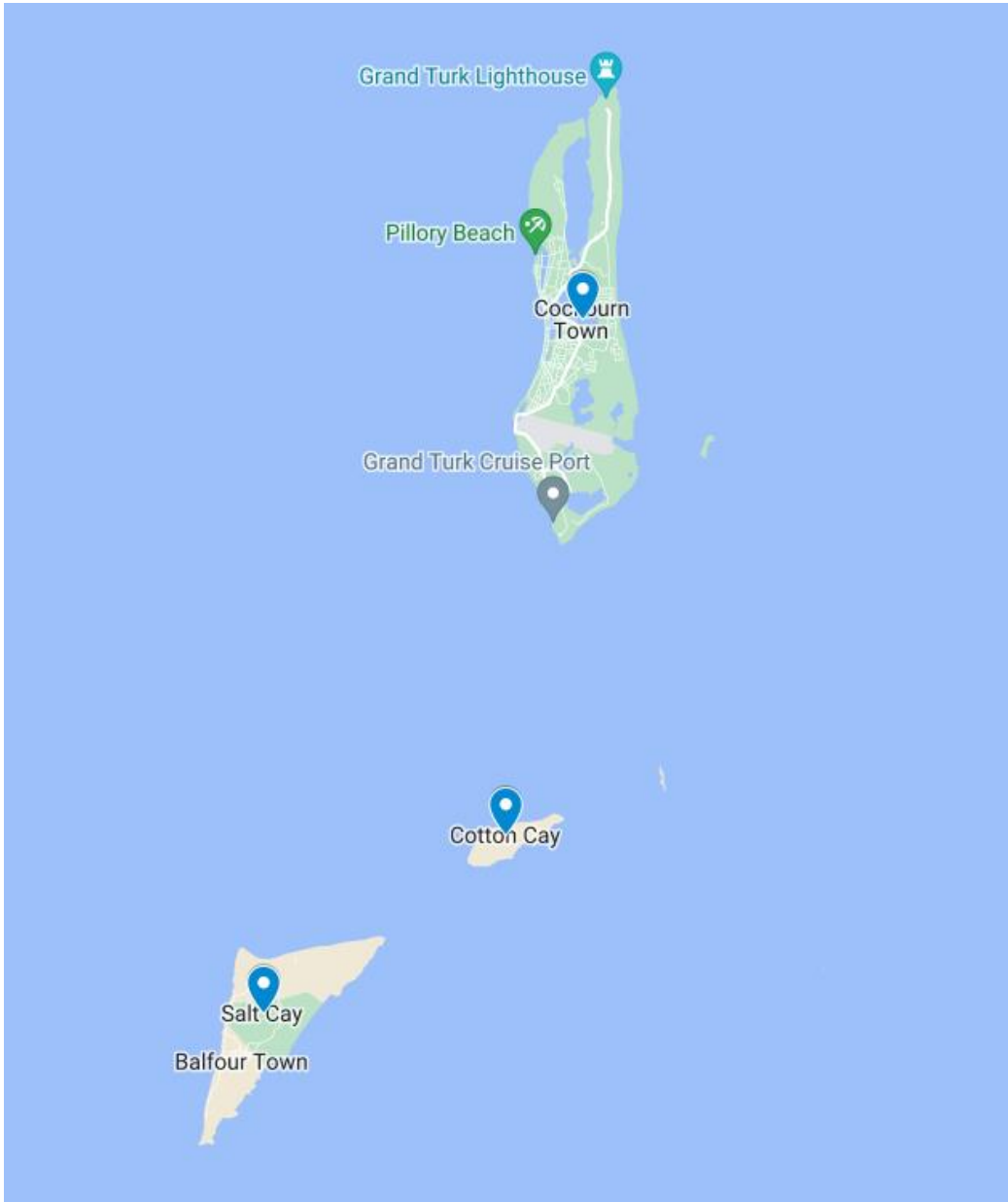
I. Ecotourism

- The Seal Cays Wildlife Sanctuary is formed by a group of uninhabited cays and rocks and is only a few miles away from Big Ambergris Cay. It is home for great birdwatching, shark watching, whale watching.

TID 4: Grand Turk / Salt Cay / Cotton Cay / Big Sand Cay

This Tourism Improvement Districts (TID) totals over 5,000 inhabitants.

Figure 4: Map²⁷ of islands and cays which are grouped as TID 4



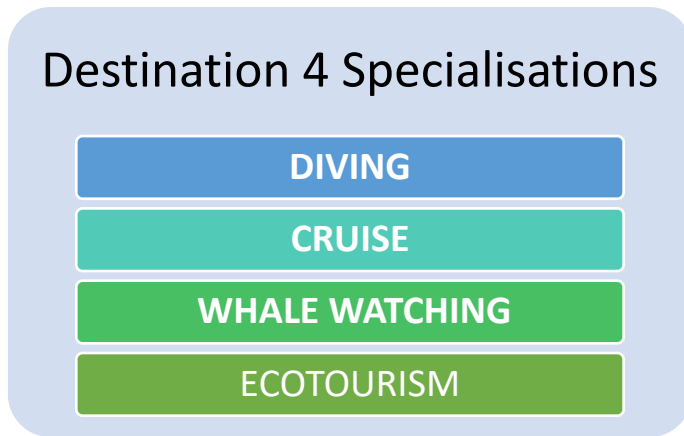
TOURISM PRODUCTS

Grand Turk, Salt Cay are physically distant from the other islands, as they are separated by the “Columbus Passage”, representing a passage over 7,000 feet deep inside the archipelago that connects the Atlantic Ocean to the Caribbean. Therefore, they partially specialise on tourism products which are different from the other TCI TIDs:

²⁷ Adaption created with My Google Maps

1. PRIORITY Potential & Present Tourism Products:

PRIORITY Potential & Present Tourism Products in TID 4 are the following:



A. DIVING

- The diving off Grand Turk is varied and vibrant. The sheer drop off of the coral wall, where the depth falls from 50 feet into the thousands, attract SCUBA divers from all over the globe.
- Unlike many other destinations, it's only a two-minute boat ride out to the barrier reef and to the island's best dive sites. Columbus Landfall National Park, said to be the first dry ground reached by Christopher Columbus on his historic voyage of discovery to the New World, protects much of the island's reefs and beaches.
- Jacques Cousteau called Grand Turk one of the ten best diving spots in the world.

B. CRUISE

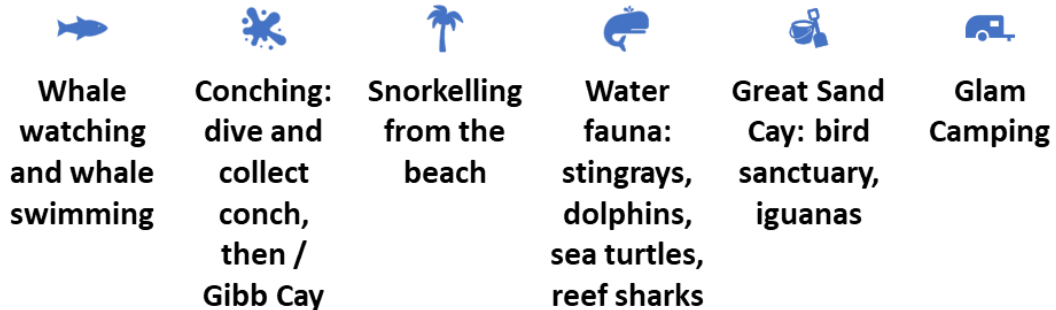
- All cruises to the Turks and Caicos arrive in Grand Turk at the Carnival operated Grand Turk Cruise Center. There are no cruises to Providenciales or any other island.
- Most cruises which stop at Grand Turk are 5–10-night cruises with several Caribbean destinations from the U.S. East Coast, commonly from Port Miami. Some cruises operate from Western Europe; however, these are typically longer duration and the number of cruises offered is a fraction of standard Miami Caribbean cruises.

C. WHALE WATCHING

- The 6,000 foot (1830 meter) deep Turks Islands Passage which separates the Turks Islands from the Caicos Islands. Whales are naturally funnelled through this channel, and the naturally increased density of whales make Salt Cay and Grand Turk unrivalled sites for whale watching and one of the best places on earth to see a whale, even from the beach.
- There's about 7,000 North Atlantic Humpback Whales from January to March.
- It's often possible to see whale calves with their mothers, along with pods of five or more whales.

D. ECOTOURISM

- Salt Cay represents a potential perfect destination for ecotourism combining various products and activities



- Salt Cay is probably the best spot in TCI to do whale watching (also from the beach) and, even, whale swimming
- Conching: dive and collect conch
- Snorkelling from the beach
- Water fauna: stingrays, dolphins, sea turtles, reef sharks
- Great Sand Cay: bird sanctuary, iguanas
- Glam Camping

2. Other SECONDARY Potential & Present Tourism Products:

Other Secondary Potential & Present Tourism Products in TID 4 are the following:

- E. Birdwatching and nature photographers
- F. History of the Old Salt Industry
- G. Wellness & Spa
- H. Deep Sea fishing
- I. Community-Based Tourism
- J. Sun & Beach
- K. Geotourism
- L. MICE tourism

E. BIRDWATCHING AND NATURE PHOTOGRAPHERS

- The marine ponds of Grand Turk naturally attract many types of wading and coastal birds. It varies a little by season, yet sightings include *flamingos*, reddish egrets, snowy egrets, cattle egrets, tricolored herons, great blue herons, yellow-crowned night herons, stilts, ducks, and sanderlings.
- Unlike the wildlife in the remote wetlands of the Caicos Islands, the birds in the Grand Turk ponds tend to be easy to approach due to their constant exposure to people, a definite consideration for nature photographers.

- Big Sand Cay is an exceptional location for birdwatching, especially for the tern and noddy. The island also attracts numbers of nurse sharks in the summer months.

F. THE OLD SEA SALT INDUSTRY & PLANTATION RUINS

Relaunch the salt industry as an economic activity as well as a tourism attraction, including new services such as wellness.

Grand Turk

Few of the salt infrastructure remains in the islands:

- Hawkes Nest Salina, located quite close to the Grand Turk Cruise Center, typically features the greatest amount of present salt crystals.
- The Salt House used to have an interesting exhibit on this industry, however the shop has since closed.

Salt Cay

- Cotton, and later sisal, were raised here and plantation ruins and field walls can be seen on the western half of the island. Uncommon on the main islands in the country, Turk's Head cactuses are well-established on Cotton Cay.

G. WELLNESS & SPA

The potential of wellness tourism in Salt Cay²⁸

Wellness tourists seeking an idyllic environment that offers slow-paced relaxation should look no further than the quaint island of Salt Cay within the Turks and Caicos Islands.

With just 108 residents and a landmass of 2.6 square miles, this small island is the perfect backdrop for a wellness resort. Visitors can get back to nature and leave their stresses behind within the charms of Salt Cay with its white-sand beaches and clear blue seas. This, combined with local wildlife encounters and a rich history, provides the island with all the attributes to take advantage of the rapidly expanding wellness economy.

Following the lifting of travel restrictions, wellness tourism is bouncing back as tourists seek destinations that offer serenity, authenticity and sustainability. With GWI consumer surveys forecasting average annual growth rates of 20.9% for wellness tourism from 2020–25, now is the ideal time for investors to act in this expanding segment.

Natural charms

For tourists looking for a little more adventure, Salt Cay is one of the few places in the world where you can snorkel with humpback whales. The annual migration means that it is the ideal location to see these majestic

²⁸ <https://www.investmentmonitor.ai/sectors/tourism-business-activities/relax-economic-potential-wellness-tourism-turks-and-caicos-salt-cay/>

creatures between January and March. Nine miles south, Great Sand Cay is a historic birthing spot for many humpback whales, with certain tourists lucky enough to spot the mother whales and their young from boats and the shores of Salt Cay.

Wellness investment opportunities

Salt Cay even featured in Hollywood's Golden Age, with the 1941 Hollywood film Bahama Passage shot almost entirely on the island. Yet despite all its natural attributes, Salt Cay has become an example of an island that time forgot. Today, the island needs an economic boost and has a lot to offer investors.

Salt Cay currently has B&Bs, but there are few other accommodation options. A wellness resort would not only be enticing for tourists who could experience the local area but also represents a huge opportunity for investors. GWI reported that, in 2020, international wellness tourists spent \$1,601 per trip on average, 35% more than the typical international tourist.

H. DEEP SEA FISHING

Grand Turk

- Several fishing charters operate from Cockburn Town with reef and deep-sea sport fishing. However, be advised that due to the time constraints of cruise visitors, these types of tourists may find they don't have enough time.

Salt Cay:

- Big fish
- Fishing tournaments

I. COMMUNITY-BASED TOURISM (CBT)

CBT in Salt Cay:

- The island of time forgot, now: the island of adventure.
- Now only 60 permanent inhabitants.
- No hotels. Airbnb style apartments. Several properties for sale. 3 restaurants.

J. SUN & BEACH

In common with all the other TIDs in TCI, TID 4 has a great variety of beautiful and almost unpopulated beaches.

- Grand Turk is home to several incredible beaches on its western coast, crowned by the beautiful Governor's Beach.

- Several spectacular beaches and interesting coastlines are found on Salt Cay. North Bay has the best swimming and snorkelling conditions.

K. GEOTOURISM

Salt Cay perfectly fits to a form tourism that sustains or enhances the distinctive geographical character of a place—its environment, heritage, aesthetics, culture, and the well-being of its residents.

L. MICE / EVENTS

Grand Turk:

- Sports events at Parade
- Small-Medium conferences and business events at Yellowman (max 500)

TRANSVERSAL PRODUCT: FILM COMMISSION & FILM TOURISM

What is a Film Commission

A Film Commission promotes the human, technical and natural resources of certain localities or regions, in order to stimulate filming in those areas, thus allowing part of the economic resources of a production to remain in the place where the filming took place.

Currently, more than half of audiovisual productions are shot outside the studios; therefore, most of the money that is invested in productions is spent outside of them. This concept started in the USA in the sixties, and it is for this reason that, faced with the accelerated development of Hollywood, the rest of the US and later Canada, decided to use this business model.

The "Film Commissions" system has been grouped into an international association, the AFCE. The world of international audiovisual production has already become accustomed to this type of structure and turns to the AFCE for information.

The AFCE communicates this information in two ways: through a directory communication channel that appears twice a year, and with its own fair and collective stands at major film festivals. On the other hand, the association has a training program for new agencies, and an annual "Cinepósium" in which specific problems and issues of its work are addressed.

The Film Commission in TCI: the Film Commission Unit of the TCI-DMO

The Film Commission will be a new product that will be developed by the TCI-DMO. In particular, a specific Unit of the TCI-DMO will be totally dedicated to the development of the film industry in TCI. This unit will be responsible to develop all infrastructures and services needed to stimulate film producers to invest in TCI for their film productions.

Referring to the personnel of the Film Commission Unit, in the short term the staff should be composed by a Film Commissioner, 1 Assistant of the Film Commissioner, 1 Film and Cultural Industry Procurement Specialist / Legal Officer, 1 Cultural Project manager and 1 Logistics / Event Management Specialist.

Objective of the Film Commission Unit

Its main objectives is to stimulate the development of the audiovisual industry in all its products (cinema, television, advertising, educational, etc.). Specifically, it aspires to:

- Promote the country as an option among the possible locations for all kind of audiovisual production.
- Promote the creation of permanent and/or temporary employment, through external productions.
- Help and consolidate the service industry in the country.
- Generate work in sectors related to the tourism industry: hotels, gastronomic services, transport, communications, etc.
- Generate material and labor conditions for the development of national production.

The DMO Film Commission Unit in TCI will work with and/or stimulate private and public stakeholders to become counterparts of international producers, essential for this model, applied universally today.

Main activities of the Film Commission Unit of the DMO

The Film Commission will have two essential tasks: attract producers, and then offer services for their production plans.

1. Marketing, advertising, awareness and public relations

The main obligation of the Film Commission Unit will be to attract foreign producers. Therefore, it is essential to spread information about the human, natural and technical resources of TCI.

For the activity of the Film Commission, all relationships are fundamental. On the one hand, the relationship with industries and governments and thirdly with the local society. With the local society the Film Commission must strike a balance between respect and collaboration. Respecting private rights that will be momentarily disturbed by the irruption of production is achieved by establishing rules of respect that the Film Commission must comply with.

These rules must include adequate and prior information to those who may be reached by the planned activity (which generally arouses interest due to its novelty for neighbors, local merchants, etc.).

2. Support for media professionals

The Film Commission Unit will provide all the information that is required by the professionals of the medium.

This should advise, coordinate and support local professional services to improve and stimulate job opportunities for actors. The function of the Film Commission Unit will be, in this case, to advise them so that the actors formulate their job offers in accordance with international rules. It will also be possible, through the “one-stop-shop” office at the DMO, to expedite the procedures for hiring actors by foreign producers.

In short, the objective of the Film Commission Unit is to attract audiovisual producers to TCI, providing them with services that a producer --particularly a foreign one-- would have difficulty obtaining without help.

3. Main services to be organised

The Film Commission Unit of the DMO will fulfil three basic services:

- Find places that correspond to the proposed scripts,
- Inform producers about available services,
- Solve any problem that arises during the filming.

The services are fundamentally two: exploration and link.

a) Exploration or "Scouting"

This term refers to the exploration of the environment to find locations, natural exteriors or interiors, suitable for filming the projects that the production companies have sent to the commission. The person in charge of this task must also obtain the necessary permits and negotiate the use of public places.

For this task, the film commissions usually have, in addition to personal knowledge and a network of external explorers, photographic archives of locations, maps, etc.

The production company that requests the service must send the script as soon as possible, not only to find the most suitable locations but also to be able to anticipate traffic diversions, effects of rain or fire, etc.

b) Liaison

This word designates another function of the Film Commission Unit: that of serving as a link between the production company and the various services offered in the country and the region. Information on production services includes:

- experienced film crews,
- actor selection service ("casting").
- offices and workshops,
- equipment rental,
- laboratories and other post-production services,
- accommodation and meals,
- personnel management, and
- transportation.

To carry out these liaison tasks, the Film Commission Unit will make available to production companies:

- production services guide,
- guide of independent professionals,
- list of costs of all services.
- connections for hotel reservations, transport, etc.

c) Public institutions that can offer services for audiovisual productions

The Audiovisual Services Program must coordinate and promote the efficient service activity of all those public bodies involved in the process.

These are some of the main services that can be offered by public services in TCI:

- Facilities for the temporary importation of equipment.
- Facilities for processing work permits and temporary residence.
- Police guard service.
- Traffic police.
- Infrastructure: ladders, cranes, etc.
- Special effects: rains, fires, etc.

- Helicopters.
- Mobile Units.
- Heavy transport.
- Communication equipment.
- Access and information on buildings and public spaces of testimonial value.
- Accommodation.
- Theaters.
- Traffic control, closures and diversions.
- Costumes from different historical eras.
- Transportation.
- Office space and temporary workshops.
- Spaces for filming (wide and isolated places for set).
- Authorizations for the use of public spaces.
- Photographic archive of the city.
- Videos about cities, islands, landscapes, etc.
- Aerial photos with drones service.

d) Additional advantages that the audiovisual services program can provide

The Film Commission Unit of the DMO could also manage special projects aimed at stimulating filming in the country. For example:

- Economic advantages - In these cases, the Film Commission will allow producers who come from abroad, access to national or regional funds for production. This access is conditioned, either to associate with a local company, or to spend a percentage of the local contribution in the place. There are countries that also offer their participation as co-producers.
- Discounts on taxes - These can range from small percentages, conditioned to certain amounts of investment, up to the total amount of a tax such as VAT from expenses in accommodations and others if, for example, the stay exceeds 30 days.
- Tax incentives - Consists of being able to deduct certain percentages of taxable income, at the time of the declaration for the payment of income taxes.
- Free services - Permits to film outdoors, the police services for the exteriors, the inscriptions of any type, communication bills, the use of public buildings, etc.
- Discounts for professional services - These are granted according to the total amounts of remuneration.

Finally, the Film Commission Unit will also manage other types of facilities for producers, for example:

- Facilities for the temporary importation of equipment.
- Processing of work permits and temporary residence.
- Centralization by the Film Commission of the granting of permits.
- Elimination or significant reduction of paperwork.

- Complete and free location services.
- Guides, photocopies, maps, etc.
- Helicopters, mobile units, other transportation and even hotel and meals on the first exploration.



D16

Annex H

National tourism strategy and implementation plan for Turks & Caicos

Annex H – TCI Digital Marketing Strategy

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1 Goals of the TCI digital marketing strategy

A strong and efficient digital marketing strategy is crucial for tourist destinations. Being present online, through websites, social media, reviews platforms, etc. is nowadays an obligation considering the [impressive numbers of travellers who use digital tools for travel related purposes](#). Digital marketing allows tourist destinations to be present for the whole duration of the consumer's journey, from the finding-inspiration process to information collecting, organization, booking, experience on-site and after-trip process.

In order to improve the TCI digital presence, make the destination grow, and based on our analysis of the current activities conducted by the tourist boards, we present to you the following 5-year digital marketing plan. This plan is structured around 5 goals that will lead the global digital activities and ensure consistent and efficient actions.

- **Improve the quality of the user's experience and of the information available online:**
 - redesigning of the website with improved content and fluid navigation,
 - enriching website pages and social media with detailed descriptions about experiences in the TCI,
 - writing and sharing at least 500 blog posts over the next 5 years.
- **Raise awareness about the destination:**
 - doubling the numbers of followers on social media accounts,
 - increasing website visits by 100%,
 - generating qualitative contents to be massively shared with travelers (i.e. YouTube videos, Instagram Reels)
- **Facilitate bookings and highlight local providers efficiently:**
 - creating a booking system on the TCI website,
 - having local stakeholders involved through fee participation,
 - providing informational content on the tourist board's digital platforms for travelers to use
- **Create a link with tourists (potential, current and past) and build a strong community:**
 - increasing social media community with qualitative leads and committed followers,
 - enhancing interaction with travelers,
 - federating travelers around the tourist board, "TCI Beautiful by Nature"
- **Increase word-of-mouth and a good after-trip process:**
 - creating a post-trip survey to keep track of customers satisfaction,
 - reaching 90% of travelers' satisfaction,
 - inspire travelers to create social media posts with a hashtag specific to the tourist board (#BeautifulByNature)

As you may notice, following these goals, the digital marketing strategy and all actions conducted within its confines will give the TCI and its tourist board the chance to be present during the whole duration of the travelers' journey.

Moreover, a strong attention has been focused on proposing actions that allow the tourist boards to collect data, from services providers or tourists.

2 Digital Marketing Activities

To reach the goals we defined for the TCI, allow the destination and tourist board to grow and differentiate itself compared to other destinations, and based on the analysis of all current digital activities, we are able to suggest strategies and digital activities that involve the TCI website, blog and social media channels. We aim at positioning the website as a tool for tourists who are looking for information before choosing their travel destination and during their planning process, at creating an interactive and user-friendly space on the TCI website to make bookings easier, at using the blog to broadcast more largely the richness of the destination and the social media to share qualitative content with a broad audience and create a link with potential, current and past visitors.

We recommend the following activities based on the concerns and axis of growth we identified previously, accompanied by recommendations supporting the TCI activities.

2.1 Brand Image

Whether on the TCI website or on social media, we had some concerns about the brand image of the destination and of the tourist board. Beside the logo and turquoise colors, we could not notice a specific brand identity that would allow a consistent image sharing for the TCI.

Consequently, as a foundation for the whole digital marketing strategy, we can suggest using a few colors, as suggested below, that match the logo and therefore serve as sharing a consistent brand image no matter the platform.



TCI Logo and extracted matching colors.

In addition to that, we also recommend using the same fonts over the various platforms used by the tourist board. Those fonts will also contribute to a consistent and homogenous image over the digital activities. Indeed, the font used in the official logo above, is not the same as the one used in the website pages. The elegant and italic font from the logo could be used for titles and headings whether on the blog, on the website, on social media pictures and graphics as well as on prints and basically all communication supports used by the tourist board.



Font on the opening video (website) VS Font in the logo

For the rest of the text, we recommend using a consistent font as well with simpler characters to make the reading of longer pages and informational contents easier.

On another hand, whereas the logo, colors and fonts are good starting points to a consistent image, to engage and create a community around the TCI tourist board, we encourage the use of a slogan throughout the different digital tools. The “Beautiful by Nature” phrase is a catchy and short way to describe the TCI, yet, it

is not broadcasted largely on communication platforms. For instance, social media accounts could include this slogan, in the biography and in posts description.

Putting emphasis on the classy and elegant font and colors, through a consistent way and by highlighting often the slogan will contribute to strengthening the brand image of the destination TCI.

Another aspect of the brand image would be the tone and the way the tourist board is communicating with tourists. By addressing them directly (i.e. “You will discover”, instead of words like “tourists/visitors will discover”), tourists are in direct link with the destination and might feel closer already.

2.2 Website

To reach the five marketing goals we envisioned for the next 5-year digital marketing strategy, the TCI website is going to be a crucial tool as it will play an important role in the development of the tourist board.

We aim at proposing a more aesthetically pleasing and easy to navigate-through platform to improve users’ experience through the redesigning of the website.

We suggest making some changes in the home-page of the website to make it look a bit more modern and appealing to catch the eye of tourists who visit it. In order to do so, the consistency of the brand image, as discussed before, is a good starting point to have a coherent appearance that matches the TCI and the image that we want tourists to have for the destination. Putting emphasis on beautiful pictures that showcase the attractive features of the destination will accompany the already rich information available online.

Having an attractive website that is easy to navigate through is a great opportunity for the destination to keep potential tourists online for a longer time period -whereas an unattractive and non-user website might scare off tourists- and convince them to book the destination there. In order to make the online navigation easier for tourists, and based on the concerns we identified concerning the numbers of entries in the menu and information that might have been repeated on different pages oftentimes, we recommend the following site map.



Recommended site map

The efforts put by the tourist board to make up a list of service providers present in the destination -whether accommodations, restaurants, experiences or other services- could be highlighted by a search, filter and

booking system instead of a listing. Setting up this system will facilitate information searching and booking processes for tourists, will allow a better promotion of tourism stakeholders -being shown more precisely to tourists who are interested in this kind of companies thanks to filters- and will make the experience in the TCI more interactive and peaceful right from the beginning of the planning process.

Moreover, allowing tourists to filter the tourism stakeholders available in the TCI will give them the chance to see the variety of options that can exist. Rather than only being seen as a beach, sunny and exclusive luxury destination, proposing filters such as cultural experiences, dance clubs, wellness facilities, sport/golf, water activities, beaches, for family, friends, with young children, vegan, eco-tourism, etc. enhance the richness of the tourism offer of the TCI.

In addition to that, just like we could observe with the *myAruba platform*, encouraging users to create an account to save their trip, itinerary and place booking will give the tourist board the chance to collect crucial information concerning visitors. From their personal data (name, surname, age, location, email address/phone number) to details concerning their habits, their interests and the type of groups who travel to the TCI.

This qualitative and modern online experience is a good starting point for tourists who start by searching information and will end up booking their trip on the TCI website. In terms of data collection, centralizing the booking of accommodation, restaurants and/or experiences allow the tourist board to directly collect information concerning their partners and services providers in order to have a greater idea of how many people stay in which hotel etc. Moreover, having visitors' contact details and personal information will give the tourist board the chance to stay in touch with travelers after their trip. We recommend the creation of a satisfaction survey that will be sent to travelers who booked through the TCI tourist board's booking system in order to collect information about their experience and highlight new axes of improvements to ensure a high level of satisfaction.

Another axis of growth we identified concerned the type of information provided to tourists on most pages of the current TCI's website. We believe we could improve the quality of information online by enriching most pages with detailed content that showcase more in detail the attractive features of the destination. The "exclusive experiences" pages such as the Whale Watching one, are in our opinion, good examples of what the rest of the *Things to do* pages could look like for instance. The list of tourism stakeholders is a great tool for tourists who are looking for service providers in the destination but we are convinced that providing more information than just contact details could enhance the attractive potential of the TCI and make it look more unique and attractive compared to other tourist destinations. Consequently, we recommend proposing more detailed content on attractions pages to focus on why the TCI is a good place for the proposed activities, what is unique and why tourists should come to the TCI for diving, casino, fishing, golfing, shopping... rather than to another destination. Providing more qualitative information will consequently facilitate the decision-making and booking process of tourists who will be given decisive information that might convince them from booking a trip to the TCI.

Finally, as a conclusive note concerning our strategic recommendations concerning the TCI website, we suggest having frequent and regular check over the website and mobile display as well as putting a specific attention and control on spelling, typos and links in-between pages to ensure a smooth experience to users.

2.3 Blog

We are convinced that the TCI blog can be a great tool for the promotion of the destination and identified some strategic notes to improve its presence and make a better use of it.

Firstly, a regular schedule seems essential to create a habit for tourists to check the blog for new articles. This

is also a great chance to show that the destination is active and shares content regularly and very often, with recent information that is currently verified and up-to-date. Depending on the amount of work, we recommend posting a minimum of one blog per week or one every two weeks.

Concerning the content and themes that could be shared, we can highlight a few interesting areas that might be of interest to promote the TCI. Themes related to specific types of travel(ers) -vegan, LGBTQ, ecotourism- and to local life -interviews with locals, culture, heritage, crafts- seem to be of great interest to tourists and will be useful to promote features of the destinations that might not be covered elsewhere but that could be attractive to tourists. Similarly, getting in touch with past travelers in order to get their reviews and ask about their experience in the TCI would be a good source of inspiration for blog posts and will act as an authentic source of information from past tourists to potential tourists who value highly peer reviews. In addition to that, asking past travelers about their experience also allow collecting data and information concerning the activities they took part in, how they liked the destination, etc.

To ensure all the effort made to make the blog posts attractive and interesting, we also suggest taking in consideration SEO techniques to optimize the referencing of said blog posts and have the opportunity to be easily found on Google.

SEO optimization relies on a few elements that need to be included in articles and blog posts (as well as in the website pages) in order to be referenced as a qualitative source. Those elements include the use of keywords, related to the TCI and to the specific topic of the article, headings and subheadings that give a structure to the post, images and attached description, backlinks, etc.

We encourage the TCI tourist board to keep on soliciting tourist board's team members, travel bloggers, locals and travelers for the writing of blog posts -keeping in mind that edit might be necessary, with the agreement of the writer, for SEO purposes-. In terms of data collection, this will allow the tourist boards to learn more about the authentic experiences that are popular among visitors and bloggers, as well as collecting information and content to post and promote the destination.

Finally, blog posts should be concluded with a Call To Action (CTA) to encourage potential travelers to get further in their information searching or booking process. CTA in blog posts could be aimed at promoting the newsletter subscription or redirect users to the booking system. Call To Actions are a great way to keep users on the website and maintain the flow in their journey and lead them to booking.

2.4 Social Media

By taking in consideration what other DMOs are doing on social media, we can suggest a few basic improvement components that will set better foundations for the following social media strategy.

The TCI Facebook account being verified is a great proof for users who know they can trust this page and find reliable contents there. Consequently, we recommend going through this verification process for other social media accounts as well.

Additionally, opting for another name than "tcitourism" -which makes it hard for people who do not know what TCI stands for- will allow users who are looking for information concerning the Turks and Caicos Islands to find the official account of the tourist board easily. At the moment, accounts that are not ruled by the tourist board are easier to find and have a better referencing. Consequently, instead of "tcitourism", we suggest including the full name of the destination such as "**turksandcaicostourism**" or "**visitturksandcaicos**".

As we mentioned before, we wish to highlight the importance of a regular posting schedule across all different platforms. Posting regularly shows your audience and potential tourists that the destination is active

and that contents are up-to-date. This creates a habit for them as they wait for the next published content. A regular content publishing strategy also works well with social media algorithms that favor constant efforts and boost engagement. A more detailed schedule will be presented as we will focus more precisely on each social media platform.

Moreover, in order to globally diversify the content posted on social media, we identified a list of “content pillars” that will be used to promote the TCI beside beach and sea-related activities. Those said "content pillars" are themes and topics that will be central to find inspiration to create posts easily. Concerning the Turks and Caicos Islands, we recommend creating contents based on the following content pillars:

- TCI facts
- Sea-related activities
- Sustainable travel/biodiversity in the islands
- Luxury travel
- Culture and heritage of the islands
- Specific segments of travelers (family, couple, wedding/honeymoon)

Creating contents on those topics will contribute to sharing facts and raising awareness on the TCI, to promote sustainable opportunities and highlight the biodiversity present in the destination, to support local culture and heritage to tourists while still promoting the richness of the sea-related activities. Beside reposting users’ contents, we recommend the creation of original content by the TCI. In order to do so, we can recommend the creation of a high-quality image database consisting of TCI’s photos and free stock images that can be found on Pexels, Pixabay or Unsplash. Contacting photographers, videographers, and/or drone pilots might also be interesting for the tourist board to obtain unique and qualitative content. This is a chance to have a talk with professional images and videos creators and to get contents focused on specific features and elements of the islands, rather than being limited to what users want to post and what stock database can propose.

Finally, a different strategy should be conducted on each platform to reach the different target, as presented below.

2.4.1 Instagram

Over 70% of young people aged from 18 to 29 years old are using Instagram, and about [60% of global Instagram users are between 18 and 34 years old](#), indicating that Instagram is mostly useful to reach a younger travel segment interested in sustainable and outdoor activities. We aim to position this social media platform as a tool for the TCI to create engagement and a link with users and tourists and to promote the attractive features of the islands through aesthetic (and informative) pictures and videos.

In terms of content, Instagram is a great tool to share pictures that showcase the destination, especially with the presence of a map that allows users to check locations. In addition to that, videos, reels, guides and stories can be posted to diversify that type of content. Stories are especially pertinent to show up-to-date and daily content. Lately, reels are getting more and more popular. When posted frequently, qualitative reels are favored by the Instagram algorithm and shown to more users, even if they don’t follow the TCI account. As a result, reels are great ways to get in contact with a wide audience of potential travelers. Additionally, we already noticed that the posts that performed the best on the current TCI account were the ones including information and useful content for users. Consequently, we encourage the tourist board to create short videos -reels- that promote the destination and that will be shown to a larger audience. To be sure to never run out of ideas for publications, the tourist board can rely on the content pillars we identified earlier.

We recommend posting a minimum of 2 to 3 times per week, alternating in-between the different themes, content pillars and types of content to propose both pictures and reels and cover the richness of the destination.

We identified a list of hashtags that can be used for posts. A maximum of 10 hashtags per post is recommended and they should be chosen in order to fit the theme and topic of posted content.

- **Tourist Board hashtags:** #TCI, #BeautifulByNature
- **TCI hashtags:** #TurksAndCaicos, #TurksAndCaicosIslands, #Caribbean, #WeAreTurksAndCaicos, #WhyILoveTurksAndCaicos, #Providenciales, #SistersIslands, #GrandTurks
- **Thematic hashtag:** #Wanderlust, #Travel, #Wanderlust, #Paradise, #Vacation, #DreamDestination, #Sailing, #Sunset, #LuxuryTravel, #SustainableTravel, #WhaleWatching, #Snorkeling, #Diving, #Yacht, #Cruise, #ScubaDiving, #Getaway, #IslandHopping, #BeautifulIsland, #IslandVibe, #Golf, #Wellness, #CaribbeanDestination, #CaribbeanFood, #CaribbeanCulture, #DreamHoliday, #FamilyHolidays, #CoupleDestination, #Honeymoon...

We encourage using a specific hashtag for the TCI tourist board -like #BeautifulByNature-, to differentiate the official account with other accounts related to the TCI and to create a strong community that will follow this *beautiful by nature* destination. As mentioned, this is also a way to strengthen the global brand image of the tourist board by using the slogan present on the website and on the official logo.

As we could notice when we analyzed other DMOs activities, posts do not require long and detailed description to be attractive to users, but providing tourists -potential, current or past- information and added-value is still an important element to position the TCI account as a reliable source of information. Facts about the destination, its cultural specificities, practical information, description of places, activities or experiences should be included. In addition to that, CTA are necessary to encourage tourists to interact with the destination's account. They can be varied and can either redirect followers to the website where they will be able to get more in-depth information or to join the booking platform or encourage them to leave comments and share the post with questions about their preferences or experiences.



2,157 likes

turksandcaicostourism Planning on visiting our islands in-between August and March? Do not miss out on a chance to try our traditional lobster dishes! 🦞
 Each year, we eagerly wait for the lobster season to start and for our local restaurants to add lobster back to their menus. 🍷
 In the Turks and Caicos Islands, lobster is served in so many shapes. 😊 What is your favorite lobster dish? Ours is definitely the spicy lobster curry! 🍴

#TCI #BeautifulByNature #TurksAndCaicos #Gastronomy #Fishing #CaribbeanFood #Lobster #TraditionalFood #LobsterFishing #SeaFood

View all 53 comment

3 days ago



1,034 likes

turksandcaicostourism Fun fact! Did you know that the colors of the costume represent each island? 🇵🇸

- 🇵🇸 Grand Turk
- 🇵🇸 Salt Cay
- 🇵🇸 South & East Caicos
- 🇵🇸 Middle Caicos
- 🇵🇸 North Caicos
- 🇵🇸 Providenciales, Pine Cay & West Caicos

The national costume of the Turks and Caicos Islands is actually a quite recent tradition. Can you guess when it made its debut? 🤔

#TCI #BeautifulByNature #TurksAndCaicos #FamilyHolidays #TurksAndCaicosCulture #CaribbeanCulture #TraditionalDress

View all 16 comments

6 days ago

Examples of Instagram posts focused on gastronomy and tradition.

The goal of social media is obviously to promote the destination, Instagram being the perfect channel where to show attractive pictures but social media are also major tools for interaction and community building. Therefore, the CTA included in posts' description should invite users and tourists to engage with the destination by commenting and sharing the posts. Reposting pictures shared by travelers in the TCI is a good starting point, but the tourist board should also interact with said users by commenting on their pictures and creating a link with them. Replying to comments on Instagram posts will enhance engagement. This engagement process contributes actively to the creation of an online community that interact frequently with the TCI accounts, share contents online and with their peers, contribute through word-of-mouth to the promotion of the destination, and stay loyal to the destination in the long run, even after their trip. On another hand, maintaining a good relationship with local tourism stakeholders can be done on Instagram. We recommend following the account of services providers in the TCI and to interact with their publications as well as to repost and share their content when it is valuable.

2.4.2 Facebook

Even though many young people do have a Facebook account, this social media is nowadays mostly favored by older users. [About 75% of people aged between 30 and 64 years are present on Facebook](#), making it a great place to reach this segment. And with [50% of people aged over 65](#) using Facebook, this is also an opportunity to reach an older segment that might not be fond of other social media and digital tools.

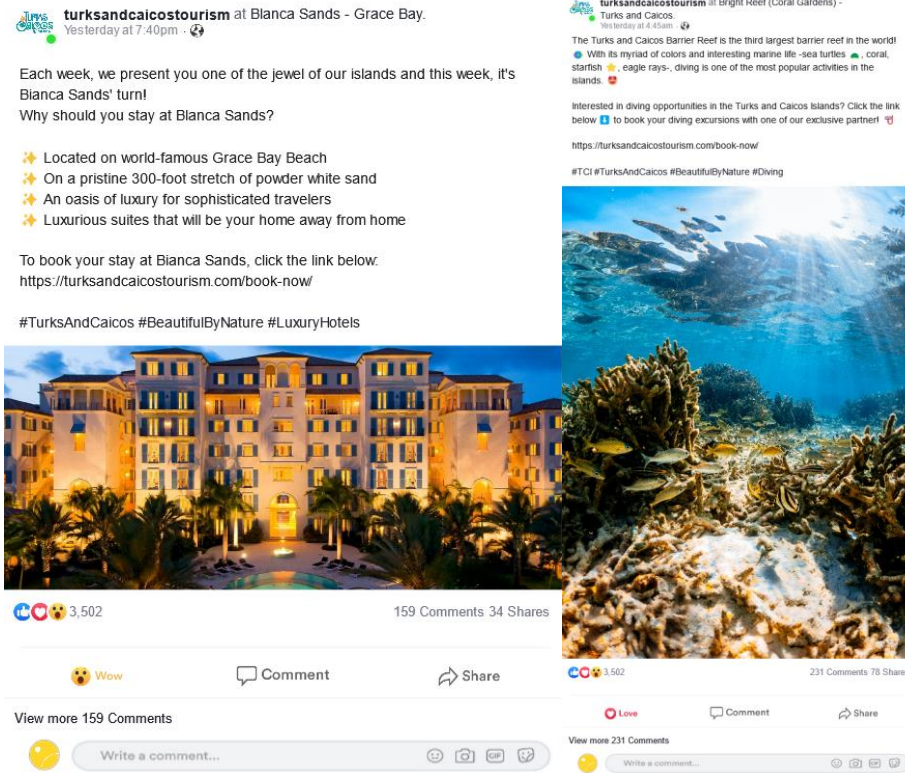
Consequently, using Facebook for a tourist segment that might not be always comfortable with digital tools is an advantage for the TCI tourist board. We already noticed that the Facebook account is verified and that many people like the official TCI Facebook page which is a good way to convince tourists of the reliability of this page. In addition to that and based on what we could observe from other DMOs practices, we recommend the implementation of an automatic popping-up chat box that would ease the interaction and information searching process for those tourists aged over 50 years old. They would be given the chance to find information on the Facebook pages and to ask questions directly to the tourist board. Answers will need to be given quite quickly as the average answering time is shown to users.

On another hand, in terms of content sharing, we suggest not to focus too much on aesthetic pictures, but to put more emphasis on informational content to give this Facebook page a concrete role to tourists looking for practical data. Consequently, more detailed posts -yet not over five-sentences-long in order not to overwhelm users- and link to the website and blog articles should be used as they are good occasions for the tourists board to provide users with useful data and redirect them to the website and to the blog for a more detailed information offer. Videos are also to be favored since the automatic playing of videos through the feed stops users when they are scrolling and captivates their attention.

Hashtags are not as important on Facebook as they are on Instagram but they can still be useful and should be used in a moderated manner. We recommend a maximum of 3 to 6 hashtags on Facebook posts.

In terms of strategy, we want to position the Facebook account as a reliable source of information, especially for older tourists who are not well acquainted with social networks, but also to use it as a promotional tool for the booking system that will be set up on the TCI tourist board website. Indeed, to propose varied and useful contents promoting the TCI and local tourism stakeholders, we imagined the creation of a series of posts focused on hotels or experiences in the TCI that will be put under the spotlight individually each week. A Call To Action inviting users to check prices and availability following a link to the booking system of the TCI website will be included in the Facebook posts, as visible below.

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Examples of Facebook posts aimed at promoting the booking system.

A regular posting schedule is also required and we recommend about 2 to 3 posts per week, that vary in terms of content covering the different pillars identified to provide practical facts but also information about the experiences and attractive specificities of the destination.

2.4.3 Twitter

Even though Twitter is not the most used social network -with "only" 436 million of users compared to almost 3 000 millions of users for Facebook-, it is still undeniable that this platform is favored by young segments, as more than 50% of Twitter users are less than 35 years old.

Twitter is a great platform where to share a mix of different content including pictures, videos and where to share links to other platforms. Consequently, we recommend relying on the variety of content available on Twitter in order to offer a comprehensive offer to users. An interesting functionality of Twitter is the retweeting function that allows the sharing of other accounts' contents and the publication of additional comments concerning the said content. The retweeting tool is a great opportunity to enrich the information offered by the TCI with additional contents from outsider and reliable sources -(inter)national institutions, news, magazines- that promote the TCI. This also gives the TCI tourist board the chance to retweet reviews and experiences of tourists and to interact directly with them.

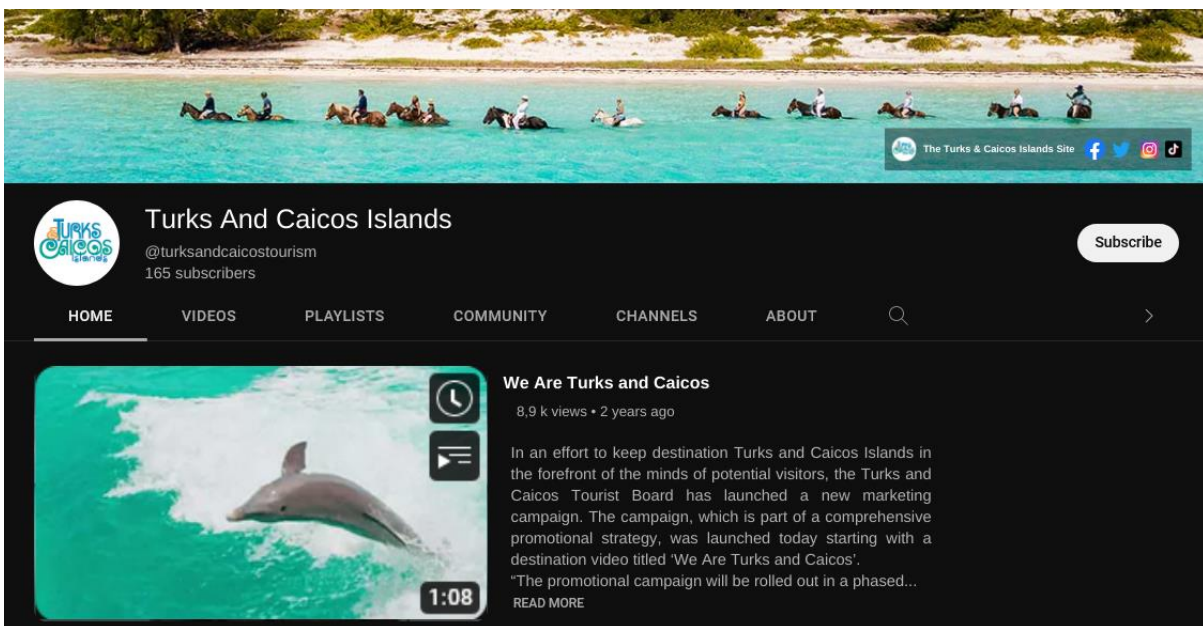
Due to the limitation of characters on Twitter -280 characters per tweet-, we recommend a strict limitation concerning hashtags. Not more than 2 to 3 hashtags should be used and content should be short and concise.

The "limited" number of Twitter users might make it complicated to attract tourists through this channel. Yet, a consistent posting process and the qualitative sharing of original content and of retweets would position the TCI Twitter account as a versatile source of information for a niche target.

2.4.4 YouTube

As watching YouTube videos does not require the creation of an account, there is less entry barrier for users who can punctually watch some videos here and there when they need to. Consequently, the YouTube platform is [largely used despite age differences](#). Over 90% of people aged from 18 to 50 use YouTube, more than 80% of people from 50 to 64 years old and about 50% of older people over 65 years old uses YouTube. Therefore, YouTube is an efficient way to reach all travelers, no matter their age. But this implies taking in consideration that desires and habits are different and should be considered when creating content to satisfy all age-segments of tourists.

As a starting point, we recommend editing the profile of the TCI YouTube account to make it more appealing. This includes having an aesthetic banner, the logo visible, link to other platforms and websites, a video saved on the homepage that is characteristic of the destination and different “playlists” that gather videos with similar themes for easier research.



Potential YouTube profile edit for the TCI.

Concerning video creation and upload, being consistent is the key. This is a chance to be favored by the YouTube algorithm and a way to provide up-to-date and frequent content to users. As we noticed on other DMOs YouTube accounts, series of short videos with similar themes and topics are interesting for tourists and can be followed through time.

Consequently, ideas of series for the TCI YouTube channel can include:

- **Practical information series**, similar to Aruba’s Visitors’ Guide, providing information from the first step of the planning process to the experience on-site. Those short videos could cover the practical information present on the website (weather specificities, how to get there and how to move in-between islands, what kind of accommodations are available, what administrative formalities for tourists, etc.)
- **Series inspired by the “Beautiful by Nature” slogan**: focused on secluded areas, the sisters islands, natural wonders, local endeavors and traditions and other aspects that contribute to making the TCI a beautiful, original and authentic destination.
- **“What to do in TCI” series** with short videos that showcase unique attractions, activities and experiences

in the islands and allow the **promotion** of tourism stakeholders in the TCI.

Similarly to other social media platforms, YouTube videos and contents should include CTA aimed at encouraging tourists to book or to search further and more in-depth information. Videos should conclude with an invitation for users to subscribe to the YouTube channel and to like the videos. Whereas the descriptions should contain a link to the TCI tourist board website, other social media platforms and to the booking platform when tourism stakeholders are involved and promoted in the videos.

2.4.5 Tiktok

A final social media recommendation would be to put some focus on TikTok, one of the most recent platforms that is gaining influence and is set to be the favorite social network for the coming year(s). Many brands and tourists are still rather shy with joining and creating content on TikTok, yet, nowadays almost [50% of young adults from 18 to 29 years old](#) are using this platform and these figures are expected to keep on growing with [already 1 000 million users in January 2022](#). Even though the DMOs we studied did not make any use of TikTok, we are convinced that this would be the chance for the TCI tourist boards to hop on the TikTok boat before other competitors could join, to differentiate its offer there and to gain a real competitive advantage. In November 2022, there were already over [110 billion of views for TikTok's videos, including the hashtag #travel](#).

TikTok is a social media platform where users can share videos, but what makes TikTok an incredible marketing tool is that videos are not only shown to followers but also to all kinds of users thanks to the algorithm. Consequently, being consistent and on the lookout for trends (music, concept) is almost the guarantee to reach many people who might be interested in the content posted by the TCI.

The struggle that comes with TikTok is that trends change quite often and keeping an eye open on everything that is popular is a challenging necessity. Yet, there is no wrong with short videos that showcase attractive views of the TCI and are catchy to users who scroll through a massive number of videos.

We can recommend the following types of TikTok for the TCI tourist board:

- [Dynamic and trendy videos with lots of beautiful shots of the TCI](#).
- [Practical and fun-facts about the TCI](#).
- [Bucket list of activities or experiences in the TCI, another way to promote local tourism stakeholders](#).
- [Short videos showcasing a single attractive view/landscape/feature of the TCI, with a trendy audio \(for better referencing\)](#).

Another advantage to TikTok is that videos created on the TikTok app and shared on TikTok can also be reposted on Instagram; a great chance to reach both types of users -rather young people- with dynamic content and videos -videos being dominantly favored by users and by the digital algorithm-.

The tourist board should keep in mind that descriptions are not particularly efficient in terms of information sharing with users on TikTok. Most information should be in the videos since many users do not read TikTok's description. A few words can be added but most of the content should rely on the videos. However, hashtags are required and crucial for better referencing and for the algorithm to promote videos.

2.4.6 Influencers and Bloggers Partnerships

Due to the importance of peers' reviews and experiences, influencers and bloggers are great potential spokespeople for the TCI tourist boards. Inviting them to visit the islands and get a taste of how *beautiful by nature* the TCI are is a good way to have trust-worthy reviews shared with users. Influencers are able to create a link with their followers the way we want the tourist board to create a link with tourists.

Influencers and bloggers should be chosen carefully, based on settled goals for the tourist board. While it might seem attractive and efficient to solicit the ones with the highest numbers of followers, this might not be the best idea. Indeed, influencers and bloggers with massive communities might charge very high prices and the return on investment could not cover said charges and they may not appear as authentic and trustworthy. Micro-influencers with smaller but active, committed and qualitative audiences could bring more benefit to the TCI with a more authentic style. Similarly, influencers and bloggers should be chosen in order to promote specific aspects of the TCI to specific segments of travelers. Rather than choosing to work with expensive mega-influencers who are massively followed without proper editorial and content strategy, we recommend finding micro or nano influencers specialized in island tourism, luxury travel, family with kids, pet-friendly, or bloggers from the TCI or the Caribbean who could promote their home as a destination they know -an even better way to give a unique authentic appearance and create a friendly relationship with travelers and the destination. When choosing an influencer or blogger, the tourist board should check the statistics, audience data and media kit of said influencer in order to check if they are the right person to promote the TCI. The TCI is positioned as a high-end destination and not all travelers are the right target for the islands. Influencers' media kits should include data concerning their audience and engagement rate and the tourist board should pay attention to these data to ensure the influencers and bloggers fit the destination.

We identified a list of potential influencers and bloggers who could be good fits to promote the TCI and work with the tourist board based on their editorial line, on the content they share and how it matches with the TCI:

- **@claireandpeter** : Claire and Peter are a couple of travelers, who visit the world and share about their trip mostly through funny and entertaining reels and vlogs. With their "unaesthetic travel vlogs", they are able to share an authentic vision of the places they visit.
- **@marrymeintravel** : A family traveling with their child and dog. They would be a great fit to show that the TCI can be a family and kid-friendly destination.
- **@alongdustyroads** : This couple -Andrew and Emily- of influencers/travel bloggers aim at focusing on sustainable and responsible travel, consequently, they would be of great help to promote the sustainable tourism opportunities available in the TCI.
- **@charlysavely** : Charly is a photographer with a large community on social media. She specializes in outdoor, conservation and wildlife content.
- **@withluke** : With his stunning and moody pictures, Luke is a travel photographer and a storyteller. His content would be a great addition to the TCI image database.
- **@catchfiftytwo** : Em is a food photographer and blogger, initially based in London, she shares content of her trip, mostly focused on gastronomy and culinary discovery. Focusing on the TCI's food culture with her would be a chance to promote local traditions.

For the collaboration to go well on both parts, the TCI should be clear with the objectives of the partnership and what are the deliverables expected from the influencers. The objectives of the collaboration with influencers and bloggers should serve the global digital marketing goals identified before and can rely on the

content pillars we mentioned before, as well as ensure a global and consistent image sharing of the destination.

In terms of benefits and return on investments, the TCI will benefit from the exposure given by the influencers or bloggers who create content on their social media account and share about their experience in the TCI. From unique accommodations to exclusive experiences, this is a way to showcase the destination to an audience who might not have heard of the TCI before or who is always looking for new travel inspiration. Moreover, bloggers or influencers who are good writers, photographers or videographers can create blog posts, pictures or videos that promote the TCI. These contents could be used by the TCI to share more on their own social media platforms and websites.

2.5 Collaboration with the TCI DMO to collect big-data

In order to achieve the digital marketing goals we settled on, TCIG should be aware that the digital marketing strategy might be subject to evolution throughout the years depending on the results and data that can be observed and collected. Collecting data is crucial for the tourist industry in TCI to have insight and knowledge about travelers, the market, tourism stakeholders, etc. Consequently, the strategies and activities we proposed before are thought of in order to enhance the data collection opportunities for the TCI and the TCIG should develop an agreement with the DMO for the collection of such data.

For example, establishing a booking system on the DMO website will be a crucial element in the data collection process. This booking platform will allow the tourist board to gather information concerning travelers but also concerning the local tourism stakeholders and their activities. To save and book their trips, tourists will be asked to create an account that includes personal and contact details including their name, surname, age, origin, email and phone numbers. Those contact details are key data to stay in touch with tourists. Moreover, depending on the booking they place, the tourist board will be granted with data concerning the size of the groups that travel, travel habits and preferences in terms of accommodations and interests in terms of activities and experiences. As a result, the booking system will contribute to providing more information concerning the travelers profiles -even though it will not be 100% representative but only based on the travelers who book on the TCI website-. In addition to that, we recommended setting up a fee or commission system for tourism stakeholders who will be featured on the website and on the booking system, allowing the TCI tourist board to collect financial perks. In addition to that, by hosting the booking platforms of some hotels and experiences/activities providers, the tourist board will be able to get a look at the numbers of bookings placed. Once again, this system will not provide completely representative data since accommodation and activities providers are likely to use various booking platforms (TripAdvisor, Booking.com, direct bookings...) but this could give meaningful insight.

A perk related to the data collected thanks to the booking system is that the tourist board will be able to stay in touch with tourists who booked in the TCI website thanks to the contact details they will have signed with. Email addresses will be used by the tourist board to send post-trip satisfaction surveys to travelers who traveled to the TCI. Satisfaction surveys are capital tools to improve experiences and services. Reviews collected through the satisfaction surveys can be shared online -on the TCI website or on social media- and will create authentic peer content that are appreciated by other travelers in addition to other Users Generated Content present on the social media account of the TCI tourist board.

On another hand, using tools like Google Analytics is an indispensable step to keeping track of the TCI tourist board performance and to collecting data. Google Analytics will give the tourist board the chance to check what pages are performing well on the website, what pages are visited the most, where do website visitors are coming from -did they landed on the website thanks to Instagram, to YouTube, to an influencer story, because they searched for it on Google, etc.-. Those insights collected thanks to Google Analytics grant the

DMO with crucial data concerning travelers habits and what are the most efficient ways to attract tourists to the official website and destination. Similarly, keeping track of the blog analytic results will give the opportunity to identify which kind of topics and themes are working well and seem particularly interesting to travelers. This could even give some hints concerning travelers profiles and preferences depending on topics that perform well (eco-travel, luxury, LGBTQ, etc.).

These data will be useful to learn more and understand in a more in-depth way the behavior of travelers interested in the TCI and will allow adjustment for communication and marketing purposes in order to focus on channels, platforms and topics that are the most efficient.

Social media have inside-app features and tools that allow account owners to check who the audience is. Basic information are provided on the apps, such as gender, age, location in addition to analytics concerning the statistics and results of the account including the increase/loss of followers, reach, impressions, engagement rate, etc. that should be checked frequently to adjust the social media strategy and ensure that marketing goals are on the right path to be achieved.

Finally, calling for influencers and bloggers could also grant the the opportunity to collect data concerning their audience and learn more about who is interested in the TCI. When inviting influencers and bloggers to visit the TCI, they can also create content on behalf of the TCI -pictures, videos, blog posts- and share on their social media. In that case, TCIG should collect data concerning the numbers of views, the reviews, the engagement, conversion and click rate related to content created by influencers.

We propose the following table as a summary of the tools and channels that will be used to collect data for the tourist board:

CHANNELS/TOOLS	DATA
Booking system (on the TCI website)	<ul style="list-style-type: none"> - contact details and habits of travelers - number of booking and statistics of accommodations and activities providers - commission/fee to feature tourism stakeholders on website and booking tool
Satisfaction survey	<ul style="list-style-type: none"> - reviews and feedback on travelers' experience
Website (Google Analytics)	<ul style="list-style-type: none"> - time spent on the website, most visited pages, how do travelers land on the TCI website
Blog (comments/views, Google Analytics)	<ul style="list-style-type: none"> - popular topics and themes and potentially consequently interests of travelers - travelers reviews and experiences (through blog post and comments)
Social media (in-app analytics tools)	<ul style="list-style-type: none"> - statistics concerning visitors (age, origin, gender, etc.) - statistics concerning content (views, likes, engagement, click, etc.)
Bloggers & influencers	<ul style="list-style-type: none"> - statistics concerning their audience's profile - statistics of the campaign conducted with the TCI

2.6 Five-year Action Plan

Channels & Activities	Y1	Y2	Y3	Y4	Y5
A. Website					
contact a web development company to redesign the website for a better navigation, more aesthetic appearance, solve backlinks and dead pages problems, etc.	x				
have a design analysis of the website to keep up with trends and ensure the website is still efficient and fluid					x
enrich all pages with informational and inspirational content promoting the TCI and its attractive features	x				
keep updated all pages with recent content to follow current situation, news and trends	x	x	x	x	x
contact a web development company to develop a searching and booking system	x				
keep in constant touch with local stakeholders to provide up-to-date information on the website and on the booking system	x	x	x	x	x
create a satisfaction survey to send to tourists who book through the TCI booking system after their trips	x				
create pages/sections of the website to highlight tourists reviews and experiences	x				
keep track of satisfaction surveys and reviews of tourists to improve the TCI offers and post updated reviews on the website	x	x	x	x	x
keep track of the analytics to improve referencing and know what pages attract the most tourists, what are their online behavior on the website, etc.	x	x	x	x	x
create and keep on enriching a high-quality images and videos database for the website and social media accounts	x	x	x	x	x
contact photographers, videographers, drone pilot to get unique content and enrich the image and video database	x				x
contact a SEO consultant to ensure good SEO practices and techniques are used for the website and blog	x				

Channels & Activities	Y1	Y2	Y3	Y4	Y5
B. Blog					
create regular blog posts providing inspirational content and out-off-the-box experiences in the TCI with SEO techniques	x	x	x	x	x
solicit bloggers, travelers, locals for the creation of authentic blog posts	x	x	x	x	x
C. Social media					
have profiles makeover to verify account, optimize description and visual presentation	x				
change accounts' name for easier to find and better referenced names that include the full name of the destination "Turks And Caicos"	x				
establish and maintain a regular posting schedule over the various social media platforms throughout the week	x	x	x	x	x
create various type of contents and promote various topics in the destination to showcase the richness of the TCI offer	x	x	x	x	x
interact and engage daily with the online community and tourism stakeholders on social media platforms	x	x	x	x	x
stay tune for new trends to ensure the TCI social media communication is up-to-date	x	x	x	x	x
regularly keep track of social media performance thanks to the in-app statistics tools	x	x	x	x	x
D. Influencers and bloggers					
contact PR or influencers agency to get in touch and exchange on opportunities and potential collaboration in-between the TCI and influencers/bloggers	x				