CAYMAN ISLANDS DESTINATION PERFORMANCE REPORT 2017

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Cayman Islands Immigration Officer

INTRODUCTION

The Cayman Islands Department of Tourism (CIDOT) research mission is to support the overall business strategic objectives by providing reliable data, useful information and analysis for future planning, decision-making and policy formulation.

CIDOT has established a comprehensive set of tourism statistics. In managing these statistics, the Research Unit functions by these critical objectives: data quality; consistency within the data sets; reporting; and providing business intelligence.

In 2017 the Ministry of Tourism placed a high level of importance on reporting. This was a building block to the work done by the Department which included the strengthening of relationships with data providers, increasing data quality and developing a business intelligence system for both internal and external use.

To fully implement the business intelligence objectives of CIDOT, the Research Unit identified the need for adequate reporting, analytics and information delivery framework. This was to improve the end user's ability to integrate data in an efficient manner to drive decision making and develop a competitive advantage for the Cayman Islands.

The objective of reporting is to fundamentally change the way stakeholders use tourism analytics to perform their jobs and how decisions are made.

> Marketing is a very vibrant and dynamic discipline. The separation of impactful and good campaign results exists in the data that underpin strategy. This is the key to the Department of Tourism success. Focused strategy, sharp media and tactical planning. – Rosa Harris, Director of Tourism

This is the second edition of the Annual Report. The report provides a comprehensive view of tourism in the Cayman Islands and presents the following sections:

Contribution to the Economy detailing visitor expenditure in the economy and direct accommodation revenue received by the Cayman Islands Government.

Resources such as accommodations statistics, employment, airport and other developments needed to drive visitation.

Global Overview of aviation, stayover visitor arrivals and cruise passenger arrivals in relation to the Cayman Islands.

Market Highlights detailing the pattern and characteristics of visitors from the United States, Canada, United Kingdom and Ireland, Continental Europe and Latin America..

Who are our stayover visitors? Demographic profile, trip details and travel planning.

Who are our cruise visitors? Seasonality and pattern of passenger arrivals, demographic profile, trip details and travel planning.

What do they think about us? Detailing visitor experience and intentions.

Why present all this data? Conclusion and Exit Survey methodology.

Stay in Touch

Appendix giving definition of concepts used in the report and detailed table.

WORLD & CARIBBEAN TOURISM

World Tourism[1]

The United Nations World Tourism Organization (UNWTO) reported that in 2017 international stayover visitors arrivals reached a total of 1,322 million, this was a 6.7% increase over 2016. Within UNWTO defined regions, Europe (8.4%) led growth in stayover arrival, which was influenced by strong performance by Mediterranean destinations.

2017 was characterized by sustained growth in many destinations and firm recovery for some destinations that suffered decreases in previous years. Results were partly shaped by the global economic upswing and robust outbound demand from many traditional and emerging source markets, particularly a rebound in tourism spending from Brazil and the Russian Federation after a few years of declines.

> "Emerging economies play a key role in tourism development and we are very pleased to see the rebound of the Russian Federation and Brazil, and the ongoing rise of India, as these key emerging outbound markets contribute to growth and market diversification in many destinations", said UNWTO Secretary- General, Zurab Pololikashvili.[2]

[1] UNWTO World Tourism Barometer (Volume 16)

[2] http://media.unwto.org/press-release/2018-04-23/strong-outbound-tourism-demand-both-traditional-and-emerging-markets-2017

China consolidated its leadership as the country that spent the most on trips abroad in 2017, with an expenditure of US$258 billion (+5%). United States of America (+ 9%), was the second largest spending market in the world. American travellers spent twelve billion dollars more than 2016 on international tourism, reaching a total of US$135 billion in 2017. The expenditure of Germany (the third largest market) and the United Kingdom (the fourth largest market) grew in both cases by 3%, and that of France (the fifth largest market) by 1%. Australia (sixth) registered a growth of 7% and Canada (seventh) of 9%. The list of the top ten is completed by the Republic of Korea (ninth), where spending grew by 9%, and Italy (tenth), where it increased by 6%.

Noteworthy outside the top ten with remarkable growth in expenditure was Sweden (+ 14%) and Spain (+ 12%).

The four economies of the BRIC group (Brazil, Russian Federation, India and China) also increased their spending in 2017. The Russian Federation (+ 13%) recovered after several years of decline reaching US$31 billion, climbing three positions and joining the group of the top ten to eighth place. Brazil (+ 20%) also recovered strongly and rose eight positions to reach the sixteenth position with US$19 billion dollars in spending. India continued its expansion with a growth of 9% in spending, reaching US$18 billion dollars, and advanced four positions in the ranking, reaching the seventeenth place.

Europe received 51% of worldwide tourism travel and 37% of worldwide tourism receipts. The Americas despite only receiving 16% of international visitor traffic accounted for 25% of worldwide tourism receipts.

Figure 1

Source: © UNWTO Barometer 2018 - World Tourism Organisation (UNWTO), April 2018

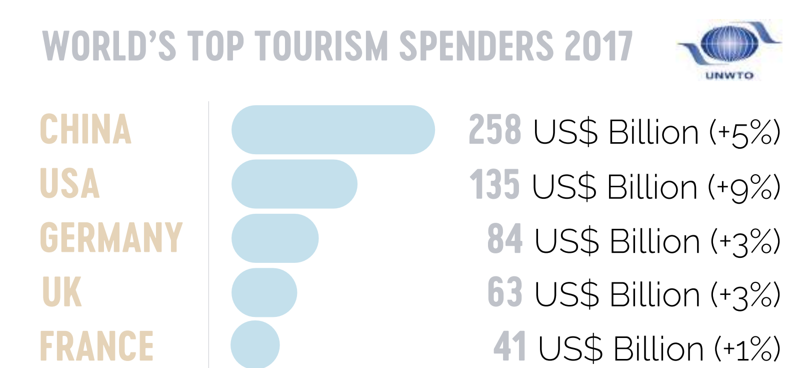


Figure 2

*2016 data

Caribbean Tourism[3]

Based on preliminary data, international stayover tourist arrivals to the Caribbean in 2017 was 30.1 million persons in 2017, an increase of 1.7% when compared to 2016. According to the Caribbean Tourism Organization (CTO) these outcomes reflect sustained demand for outbound travel from the United States - the Caribbean's main source market, improved global economic conditions, enhanced tourism-related infrastructure within the destinations, the fulfilment of strategic marketing initiatives (roadshows, familiarization trips etc.) and augmented airlift capacity between the region and its source markets tempered by the devastation caused by the September hurricanes and the subsequent hotel closures. Total visitor expenditure in the Caribbean reached an estimated US$37.0 billion in 2017, representing a 2.6% increase when compared to US$36.0 billion in 2016. This performance marked the eighth consecutive year of growth. Spending by cruise passengers accounted for approximately 7.6% of total visitor expenditure in 2017. Overall, stayover visitors spent an estimated US$34.2 billion.

In the post-hurricane period, October to December, decreases in arrivals ranged from an estimated -4.0% in December to -8.6% in October. In absolute terms, approximately 8.0 million international trips were made to the region during the September to December period, representing a decline of 6.9% when compared to the performance in 2016.

The growth which some destinations received during the first eight months were dramatically changed in September when major hurricanes affected Anguilla, Antigua and Barbuda (particularly Barbuda), Bahamas (particularly the southern Islands), British Virgin Islands, Dominica, Puerto Rico, Sint Maarten, St. Martin, the Turks & Caicos Islands and the US Virgin Islands. Each destination suffered severe disruption to its growth in the months which were to follow. Monthly declines typically exceeded -30.0% and reached as high as -90.0%. Most of these destinations ended the year with no gains. Declines ranged between -6.7% (i.e. Antigua & Barbuda) and -17.9% (i.e. British Virgin Islands).

Table 1: Top Ten Caribbean Countries (Stayover Arrivals)[4]

DESTINATION	2017 Tourist Arrivals	2016-17 YOY % Diff
Dominican Republic	6,187,542	3.8
Jamaica	2,352,915	7.8
Puerto Rico	1,598,559	-10.7
Aruba	1,070,548	-2.9
Barbados	661,160	4.7
U S Virgin Islands	612,702	-14.3
Martinique	535,646	3.1
Belize	427,111	10.8
Cayman Islands	418,403	8.5
Turks & Caicos Islands	416,434	-8.2

[3]*Source: Caribbean Tourism Organization, March 2018*

[4]*Data from Bahamas and Cuba data was not available. St. Maarten had insufficient data.*

The United States accounted for approximately half of all arrivals to the region and is estimated to have grown by 0.5%. The top three markets for Americans in the region (Dominican Republic, Jamaica and Puerto Rico) each welcomed over 1.5 million Americans in 2017. The countries with highest growth rates for American visitation were Grenada (16.1%), Cayman Islands (13.4), Barbados (11.5%) and Aruba (10.5%).

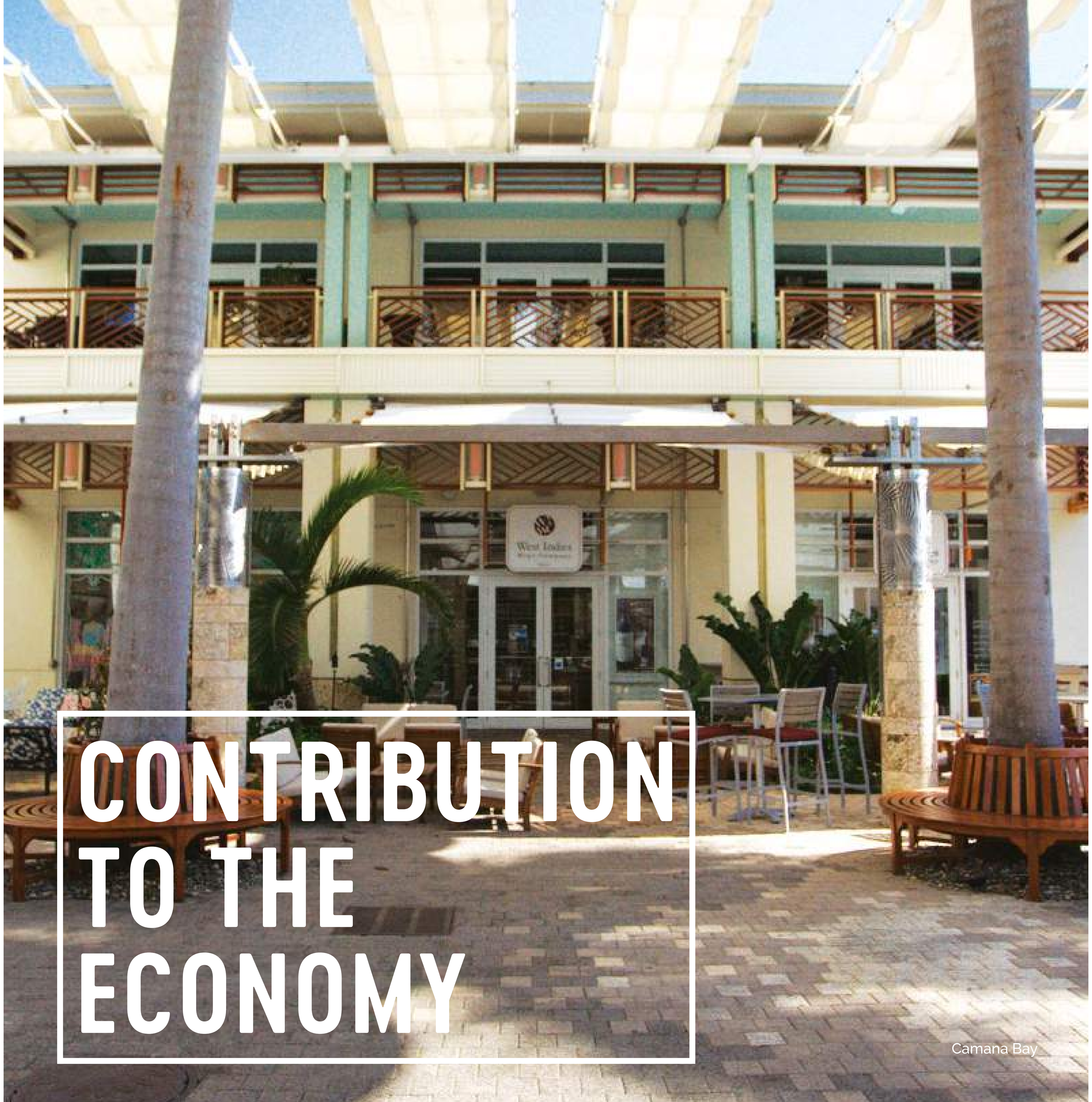
Visitation from the Canadian market increased by an estimated 4.3% in 2017 and accounted for 11.5% of Caribbean visitors. CTO reported that the growth was because of a rebounding Canadian economy and increased services from major Canadian cities to Caribbean destinations. Additionally, the gains of the Canadian dollar against the US dollar made Caribbean travel more affordable for Canadians. Except for September and October, tourist visits from this market grew in each month of the year when compared to 2016. Dominican Republic and Jamaica received the largest portion (35.7% of the total market[5]) of Canadian visitors. The highest growth rates were recorded in Belize (19.3%), Bermuda (15.8%), Saint Lucia (12.7%) and Aruba (12.1%).

The European market recorded growth of 6.2% in 2017, totaling 5.7 million visitors. This market accounted for 19.2% of total arrivals to the Caribbean. According to CTO, the overall results reflect the strong economic performance across the European continent and a strengthening euro. Results did not seem to be affected by the political disturbances which still loom in individual countries such as Brexit negotiations and the related uncertainties, as well as the delayed formation of a government in Germany. The highest growth rates were recorded in Suriname (51.9%), Dominica (25.7%) and Belize (17.6%).

South American visitation to the region declined by 6.5% and totaled 1.8 million. Strong performances in the Cayman Islands (38.3%), Jamaica (34.4%) and Guyana (33.3%) led growth among the six destinations (out of 15 reporting) which registered increases.

Cruise passenger arrivals in 2017 was an estimated 27.0 million passengers, which was a 2.4% increase when compared to 2016. Cruise passenger arrivals grew in each month except for September and December when damages to major ports and destinations caused cruises to be cancelled or rerouted after the hurricanes. Some ships were diverted from regular schedules to provide temporary housing for relief workers and displaced residents during the fourth quarter. The top 5 markets for cruise passenger arrivals in the Caribbean (ranking order) were Bahamas, Cozumel, Jamaica, Cayman Islands and the US Virgin Islands.

[5]*Cancun and Cuba usually account for an additional 40% of all arrivals from Canada*



CONTRIBUTION TO THE ECONOMY

Camana Bay

CIDOT has developed over the past three years holistic measures for tourism and its impact on the Cayman Islands economy. Gone are the days that tourism is being measured only by the number of visitors. Still a key component, the number of visitor arrivals remains an important indicator of the health of the tourism industry, but is not the only consideration.

CIDOT has been exploring different tourism statistics useful for understanding the economic contribution of visitors' activities, characteristics and contribution.

Tourism expenditure and direct revenue received by the government are two key economic contributors that will be reviewed in this section and then followed by other visitor data that enhance the full picture of tourism in the Cayman Islands in subsequent sections.

To note, tourism expenditure is defined as amounts paid for the acquisition of consumption goods and services as well as valuables for own use or to give away. For example, air transportation on domestic airlines and taxi service at the airport during a visitor's trip is classified as a tourism expenditure. Expenditure estimates only include inbound tourism expenditure which is expenditure by non-resident visitors within the destination.

In 2017, the destination received a total estimated visitor spend of KY$651.7 million. This was a KY$71.7 million or 12.4% increase over 2016.

Stayover visitors accounted for **76.4%** of estimated expenditure. This is a 2.1 percentage point increase over the **74.2%** share in 2016. Cruise visitor expenditure was **23.6%** of the total estimated expenditure in 2017.

STAYOVER VISITOR EXPENDITURE

It was estimated that stayover visitors' expenditure in 2017 was four hundred and ninety-seven million, six hundred thousand Cayman Islands dollars (KY$497.6m). This was a **KY$67.1 million or 15.59% increase over 2016.**

The increased total expenditure was because of a variety of factors mainly that the destination welcomed **32,952 more visitors than 2016** and the average visitor **spent more per day in 2017.**

In the first half of the year, spending was **52.2% of total expenditure.** This was less than the **56.0% recorded in 2016.** This was influenced by the second half of the year **growing by 14.4%** and the **first six months growing by only 3.7%.**

The average travel party size **for 2017 was 2.38 persons**; these are persons travelling together on a trip and whose expenditures were pooled. The average **party spending** was **estimated to be KY$2,830.70** and the average **party spend per night was KY$449.32.**

Source: Cayman Islands Department of Tourism

Average spend per stayover visitor in the destination was **KY$188.79 per night in 2017.** This was a **KY$10.65 increase over 2016.**

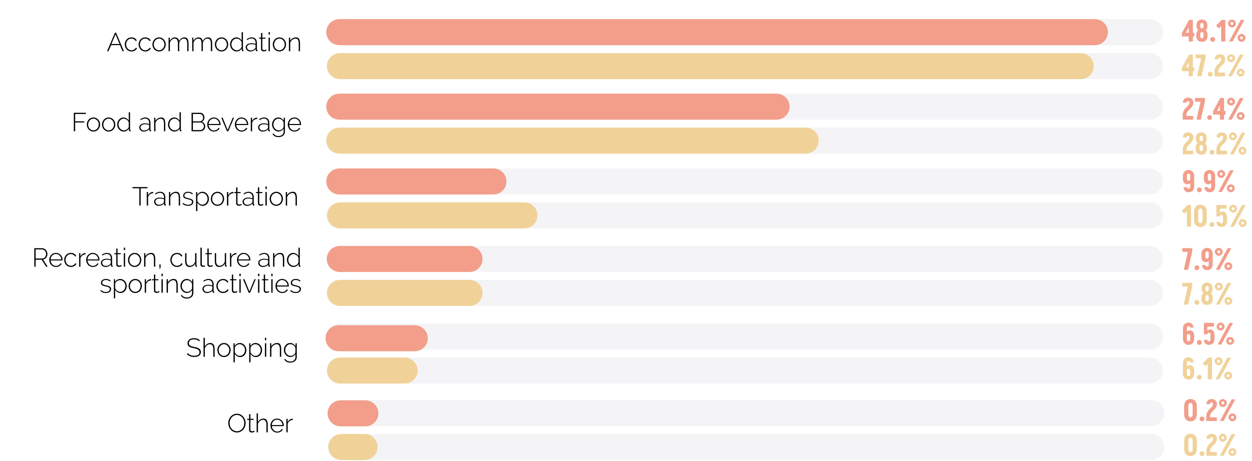
Table 2: Detailed Stayover Visitor Expenditure

	2016	2017	YOY Diff	%
Total Arrivals (Persons)	385,451	418,403	32,952	8.55
Total Stayover Visitor Expenditure (KYD '000)	**430,529.40**	**497,635.00**	**67,105.60**	**15.59**
Average Expenditure per party (KYD)	2,669.51	2,830.70	161.19	6.04
Average Expenditure per person (KYD)	1,116.95	1,189.37	72.42	6.48
Average Expenditure per party per night (KYD)	425.76	449.32	23.56	5.53
Average Expenditure per person per night (KYD)	178.14	188.79	10.65	5.98
Average Length of Stay (nights)	6.27	6.30	0.03	
Average Expenditure Party Size (Persons)	2.39	2.38	-0.01	

Non-Packaged expenditure accounted for **90.1% of total expenditure.**

Accommodation spending accounted for **48.1% of stayover visitors'** non-packaged expenditure **in 2017**. This was **higher than the 47.2% share in 2016**. Accommodation was followed by spending on food and drinks which **accounted for 27.4%.**

Figure 3: Distribution of Expenditure by Stayover Visitors 2016 vs 2017 (not Including Package Travel)



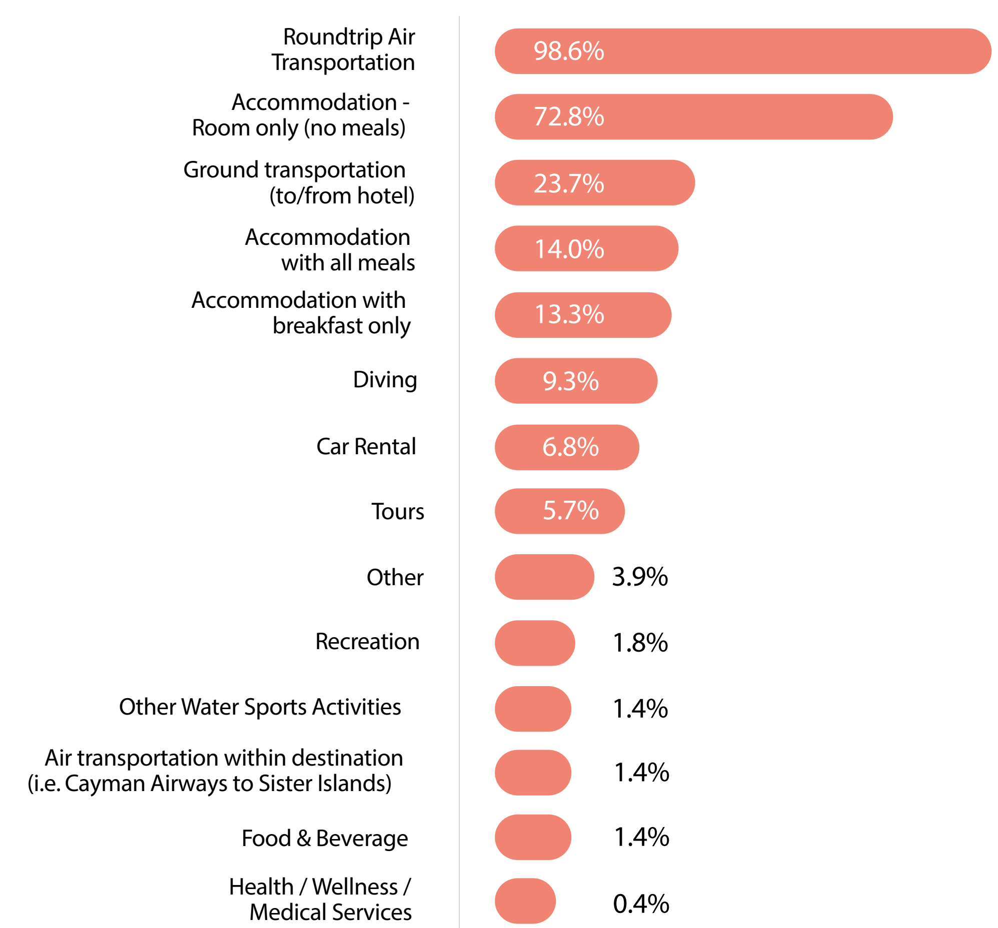
Source: Cayman Islands Department of Tourism

The Westin Grand Cayman Seven Mile Beach Resort & Spa

10.9% of respondents from the 2017 Cayman Islands Visitor Exit survey reported purchasing a vacation package. This accounted for 9.9% of total visitor spend. The top seller of packages to the destination from the Exit Survey were Expedia, JetBlue Vacations, Cheap Caribbean and Travelocity.

When looking on the items included as part of packages, 100% included accommodation. Of that, 72.8% included accommodation with no meals and 14.0% included accommodation with all meals. Roundtrip air transportation was a part of 98.6% of packages purchased. Ground transport to / from the hotel and diving were in 23.7% and 9.3% of packages respectively.

Figure 4: Composition of Travel Packages



Source: CIDOT Visitor Exit Survey 2017

CRUISE VISITOR EXPENDITURE

Cruise visitors spent one hundred and fifty-four million Cayman Islands Dollars (KY$154.0 million) in the destination. This is a KY$4.1 million or 2.7% increase over 2016.

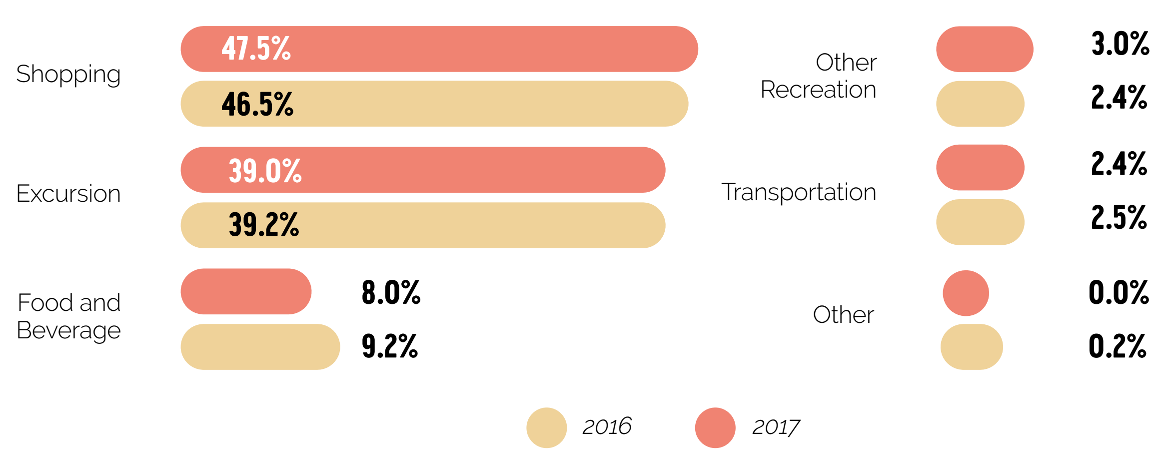
Average spend per cruise visitor in the destination was KY$98.78 per night in 2017. This was a KY$1.45 increase over 2016.

Table 3: Detailed Cruise Visitor Expenditure

	2016	2017	YOY Diff	%
Number of Passengers	1,711,849	1,728,444	16,595	0.97
Cruise Passenger Onshore Visits (Persons)	1,540,665	1,555,602	14,937	0.97
Total Cruise Visitor Spending (KYD '000)	**149,946.5**	**154,032.0**	**4,085.5**	**2.72**
Average Spending per party (KYD)	220.94	222.26	1.32	0.60
Average Spending per person (KYD)	97.33	98.78	1.45	1.49
Average Spending Party Size(KYD)	2.27	2.25	-0.02	

In 2017, shopping accounted for 47.5% of cruise visitors' expenditure and was followed by excursions which accounted for 39.0%.

Figure 5: Distribution of Expenditure by Cruise Visitors 2016-2017



Source: CIDOT Visitor Exit Survey 2017

DIRECT GOVERNMENT ACCOMMODATIONS REVENUE

The Government of the Cayman Islands collected twenty-six million, six hundred thousand Cayman Islands dollars (KY$26.6 million) in tourism related direct revenue in 2017. This is a 17.4% increase when compared to 2016. The revenue collected includes Tourist Accommodation Tax (TAT), Timeshare Accommodation Tax (TST) and Hotel License Fees (HTL). TAT accounted for 96.3% of revenue collected and grew by 18.0%. TST accounted for 2.8% of revenue and saw growth of 3.0% and HTL accounted for 1.0% of revenue collected and saw growth of 9.6%.

Table 4: Direct Government Accommodations Revenue

	2016	2017	YOY Diff
Tourism Accommodation Tax (TAT)	21,716,814	25,615,640	17.95 %
Timeshare Accommodation Tax (TST)	715,160	736,379	2.97 %
Hotel License Fees (HTL)	227,856	249,651	9.57 %
TOTAL	**22,659,830**	**26,601,670**	**17.40 %**


QE II Botanic Park

ACCOMMODATION

Room Stock

At the close of 2017 the Cayman Islands room stock stood at 6,196 bedrooms in licensed tourism accommodation properties. This is 291 bedrooms more than 2016 year end room stock. The increased number of bedrooms can be attributed mainly to the Condos/Apartments and Guesthouses/Villas categories.

The number of beds in the destination was 8,808 which was 320 more than the end of 2016. Bed places also increased, to a maximum capacity of 18,067, which was 800 more than the end of 2016.

Table 5: Cayman Islands Accommodation Stock, 2017

CATEGORY	BEDROOMS	BEDS	BED PLACES (Capacity)
Condo/Apartment	2,769	3,973	7,232
Guesthouse/Villa	940	1,232	2,407
Hotel	2,487	3,603	8,428
TOTAL	6,196	8,808	18,067

Grand Cayman room stock was 5,821 bedrooms (93.95% of the total room stock), followed by Cayman Brac with 238 (3.84%) and then Little Cayman at 137 (2.21%).

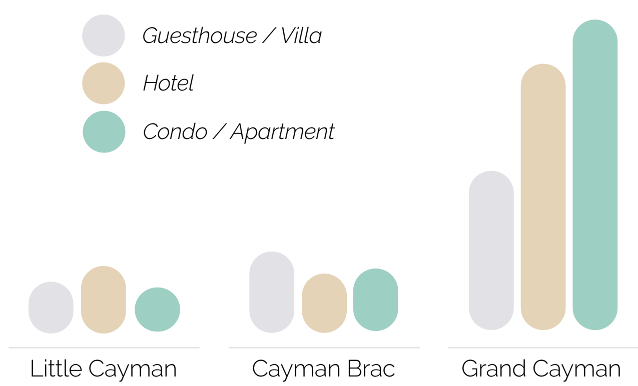
Condos/Apartments accounted for 2,769 bedrooms (44.69% of the bedrooms) in the destination and was followed by Hotels at 2,487 (40.14%).

Table 6: Accommodation Stock (Bedrooms) by Island, Category and Property Size
Source: Cayman Islands Department of Tourism

CATEGORY	GRAND CAYMAN	CAYMAN BRAC	LITTLE CAYMAN	TOTAL
Condo/Apartment	2,668	69	32	2,769
Guesthouse/Villa	796	117	27	940
Hotel	2,357	52	78	2,487
SIZE OF PROPERTY (# of Bedrooms)				
50 or less	2,135	238	137	2,510
51 - 100	1,108	-	-	1,108
100 - 200	1,059	-	-	1,059
Over 200	1,519	-	-	1,519
TOTAL	5,821	238	137	6,196

Source: Cayman Islands Department of Tourism

Figure 6: Accommodation Stock (Bedrooms) by Island



In 2017, the destination had 369 tourism accommodation properties. Grand Cayman accounted for 299 of the properties followed by Cayman Brac and Little Cayman with 54 and 16 properties respectively. It should be noted that one property could have multiple owners, each with their own accommodation license. For the table below with the number of properties, the number of licenses were not counted, instead we only count the property. For e.g. Smiling Condos on Seven Mile Beach has 15 different owners who each have a short-term accommodation license for each of their units. In the table below, the destination did not count the number of units (or licenses), we counted just the property.

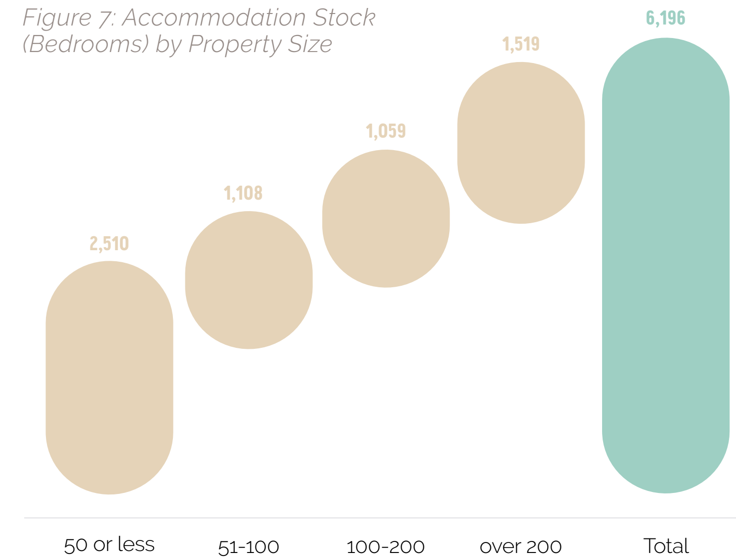
Table 7: Property Count (# of Properties) by Category and Property Size

CATEGORY	GRAND CAYMAN	CAYMAN BRAC	LITTLE CAYMAN	TOTAL
Condo/Apartment	107	9	4	120
Guesthouse/Villa	179	43	8	230
Hotel	13	2	4	19
SIZE OF PROPERTY (# of Bedrooms)				
50 or less	271	54	16	341
51 - 100	15	0	0	15
100 - 200	8	0	0	8
Over 200	5	0	0	5
TOTAL	299	54	16	369

Properties with 50 or less bedrooms accounted for a total of 2,510 bedrooms (36.36% of the room stock) within the destination. Properties with over 200 rooms offered 1,519 bedrooms (24.52% of the room stock). The entire room stock in Cayman Brac and Little Cayman fall under property sizes with 50 or less bedrooms.

Source: Cayman Islands Department of Tourism

Figure 7: Accommodation Stock (Bedrooms) by Property Size



Occupancy

The overall occupancy[1] rate in the destination was estimated to be 62.21% in 2017. This was 0.76 percentage points lower than 2016 estimates. Occupancy rate declined despite a growth in visitation. Hotel occupancy[2] was 68.01% in 2017 compared to 70.54% in 2016. This would have been due to new properties entering the market and adding rooms to the available room stock at the end of 2016 and 2017. Despite the fall in occupancy rate, visitors spent more on accommodation in 2017 compared to 2016.

[1]Estimated overall occupancy rate is based on data received from properties representing approximately 50% of overall room stock.

[2]Hotel occupancy rate is estimated from data received from hotels representing approximately 85% of hotel room stock

Figure 8: Room Stock and Property Count by Island

# of Room Stock	Grand Cayman	Cayman Brac	Little Cayman	TOTAL
Condo/Apartment	2,668	69	32	2,769
Guesthouse/Villa	796	117	27	940
Hotel	2,357	52	78	2,487

# of Property	Grand Cayman	Cayman Brac	Little Cayman	TOTAL
Condo/Apartment	107	9	4	120
Guesthouse/Villa	179	43	8	230
Hotel	13	2	4	19

TOURISM INDUSTRY EMPLOYMENT

The Labour Force within the Cayman Islands totaled 41,764 persons according to the Spring 2017 Labour Force Report[1]. This was 1,551 more persons than was reported in the Spring 2016 Labour Force Report. Industries that have been identified as predominantly tourism characteristic industries include Restaurants, Accommodations, Arts/ Recreation and Transport.

Each industry employed the following numbers according to the report: The Restaurants and Mobile Food Services industry employed 2,799 persons; Accommodation industry employed 2,486 persons; Transport and Storage was at 1,956; and the Arts, entertainment and recreation industry employed 1,165 persons. These four industries accounted for 20% of the Labour Force in 2017.

Table 8: Employment in Tourism Characteristic Industries

TOURISM CHARACTERISTIC INDUSTRY	PERSONS
Restaurants and Mobile Food Services	2,799
Accommodation	2,486
Transport and Storage	1,952
Arts, entertainment and recreation	1,165

[1]*Source: Economics and Statistics Office*

GLOBAL OVERVIEW


Rum Point

STAYOVER VISITOR ARRIVALS

CAYMAN ISLANDS VISITOR IN 2017

418,403 STAYOVER VISITORS

78% RECREATION AND PLEASURE

MEDIAN AGE **44**

51% FEMALE

41.5 AVERAGE AGE

48% OF VISITORS PREVIOUSLY VISITED

35% OF VISITORS USED AMERICAN AIRLINES MORE OFTEN THAN OTHER AIRLINES

PREFER HOTEL / GUEST HOUSE over other types of accommodation **46%**

SUN MON TUE WED THU FRI SAT

56% MAIN TRAVEL DAYS WERE FRI - SUN

7% BUSINESS

6.2 NIGHTS STAYED ON AVERAGE

KY$188.8 SPENT PER NIGHT

55% VISITORS SURVEYED REPORTED HHI OVER **$150K**

WEBSITE USED MOST OFTEN
- visitcaymanislands.com
- TripAdvisor
- Hotel Website

WHEN MAKING A DECISION TO VISIT, THEY ARE HEAVILY INFLUENCED BY PREVIOUS VISITS, WEBSITES, FRIENDS AND FAMILY.

The Cayman Islands welcomed 418,403 stayover visitors in 2017 which was an 8.6% increase when compared to 2016. This was a record number of visitors into the destination and the first time that the Cayman Islands welcomed more than 400,000 visitors.

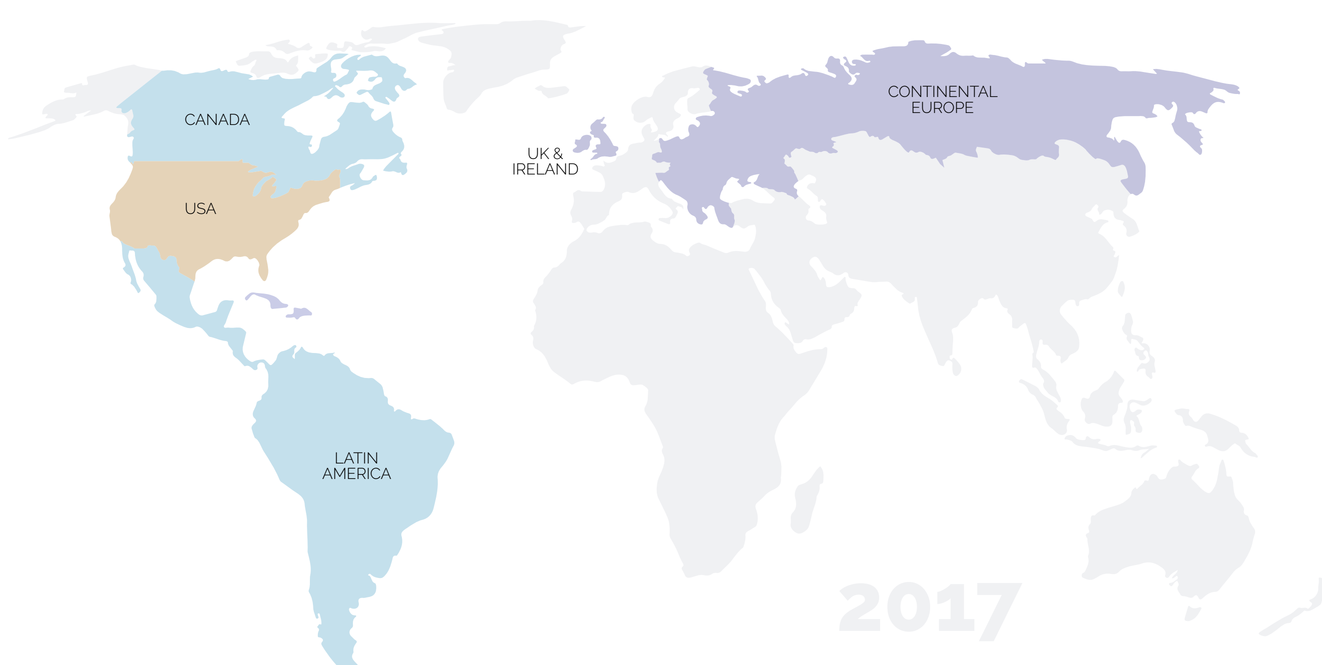
The destination rebounded from a slow growth rate in 2015 and 2016 to a 8.55% growth in 2017. Results were partly shaped by improved global economic conditions, increased airlift, strategic marketing initiatives and new accommodation products.

Commenting on this achievement, Deputy Premier and Minister of Tourism, the Hon. Moses Kirkconnell said, "The performance of the country's tourism sector and all who played a role in attracting more visitors to the destination should be extraordinarily proud of their efforts. It is the mandate of the Ministry of Tourism to facilitate annual growth in visitation; however, it is a collective effort that makes it a success. I encourage all of us in the tourism industry and its auxiliary partners to use this accomplishment as a springboard for even greater success in 2018.

Overall annual performance in 2017 was driven by visitation from the United States and Canada with growth rates of 13.44% and 6.37% respectively. Statistics for 2017 showed that incremental growth was not just from traditional markets, but also emerging markets such as Latin America which saw an increase of 22.61%. Specifically, South America increased by 38.26% while Central America increased by 13.78%.

Arrivals by marketing regions for 2017 were as followed:

Figure 9: Stayover Visitor Arrivals by Marketing Regions



USA 340,955 | **Canada 24,757**

Rest of the World 20,994 | **UK & Ireland 15,259**

Continental Europe 8,993 | **Latin America 7,445**

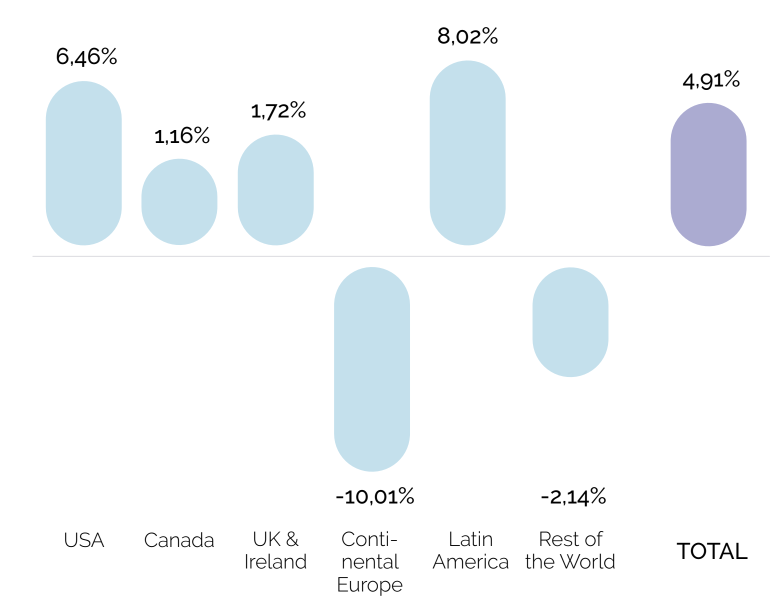
Table 12: Stayover Arrivals by Global Regions[1]

GLOBAL REGIONS	2016	2017	Market Share 2017	YOY %
Africa & The Middle East	1,395	1,303	0.31	-6.59
Asia	1,336	1,451	0.35	8.61
Australia & Oceania	2,176	1,696	0.41	-22.06
Caribbean	20,976	15,824	3.78	-24.56
Continental Europe	13,081	8,994	2.15	-31.24
North America	323,845	365,712	87.41	12.93
Others/Unknown	431	720	0.17	67.05
Central America	3,881	4,416	1.06	13.79
South America	2,190	3,028	0.72	38.26
UK & Ireland	16,140	15,259	3.65	-5.46
TOTAL	**385,451**	**418,403**	**100.00**	**8.55**

The United States and Canada accounted for 87.4% of stayover visitation to the Cayman Islands. This was followed by the Caribbean at 3.8% and then the United Kingdom and Ireland at 3.7%. The North American market grew by 12.9% or an additional 41,867 visitors compared to 2016. South America was the second most impactful region for growth recorded in the destination with an additional 838 visitors or a growth rate of 38.3%. The Caribbean and Continental Europe regions had a combined 9,239 fewer visitors in 2017 compared to 2016.

The destination has grown by an average of 4.9% per annum[2] for the period 2013-2017. For the same time-period, Latin America had an average annual growth rate of 8.0% whilst the United States averaged at 6.5%. Continental Europe and the Rest of the World had negative averages of 10.0% and 2.1% respectively.

Figure 10: Average Annual Growth Rate (2013-2017)

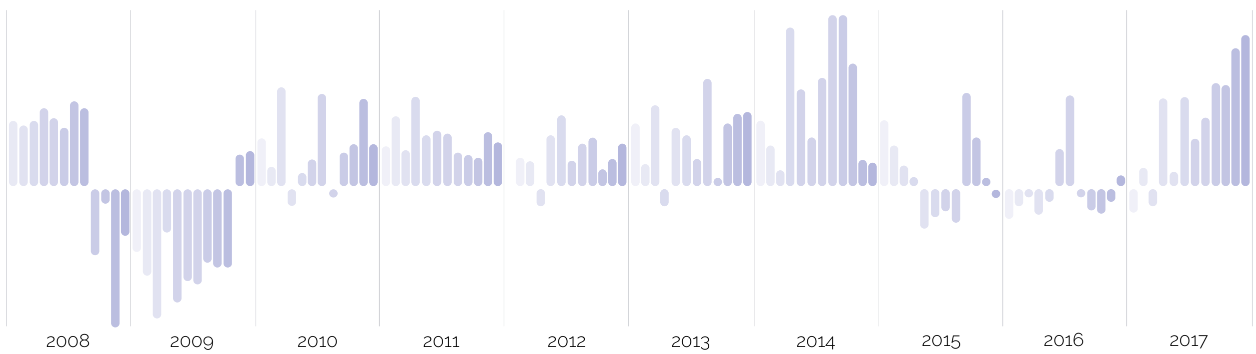


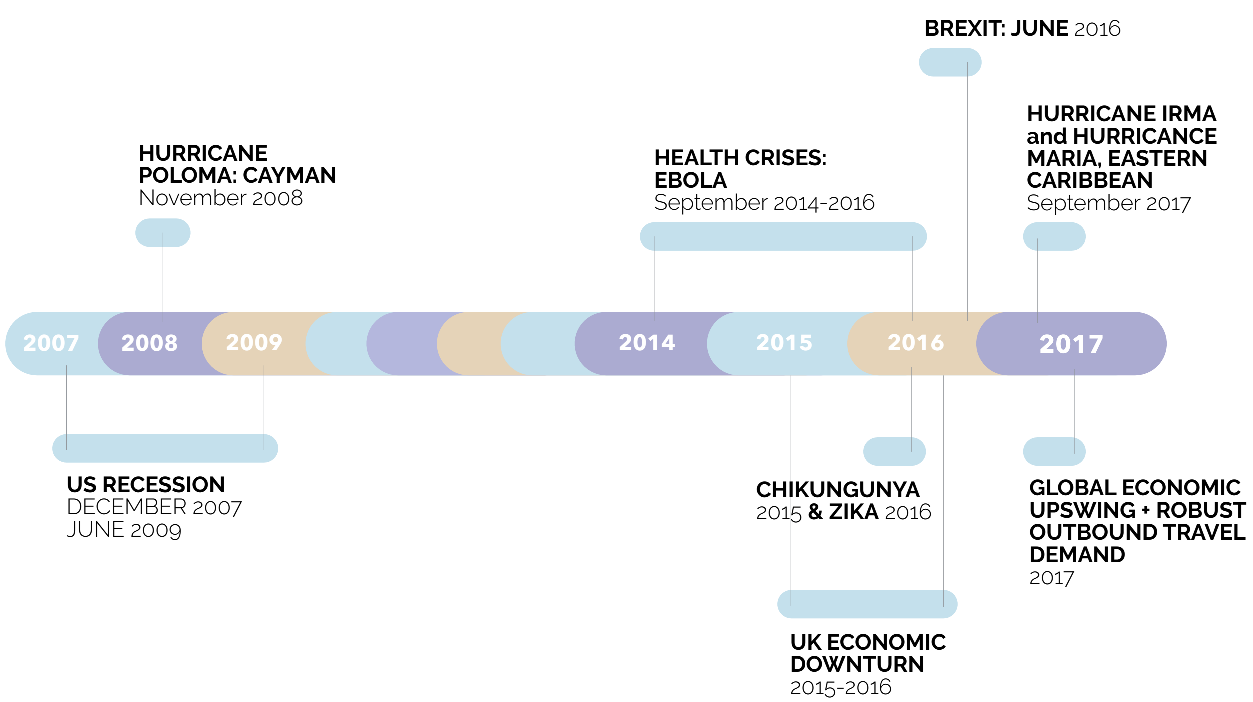
Source: Cayman Islands Immigration Department

[1] See the appendix section for the breakdown of Global Regions by country
[2] Average Annual growth rate represents a compounded growth rate

Global events that affected international travel also impacted the destination. The table below provides insights on the year over year percent change in arrivals to the Cayman Islands and international affairs that may have affected the outcome.

Figure 11: Global Stayover Arrivals with Significant World Factors

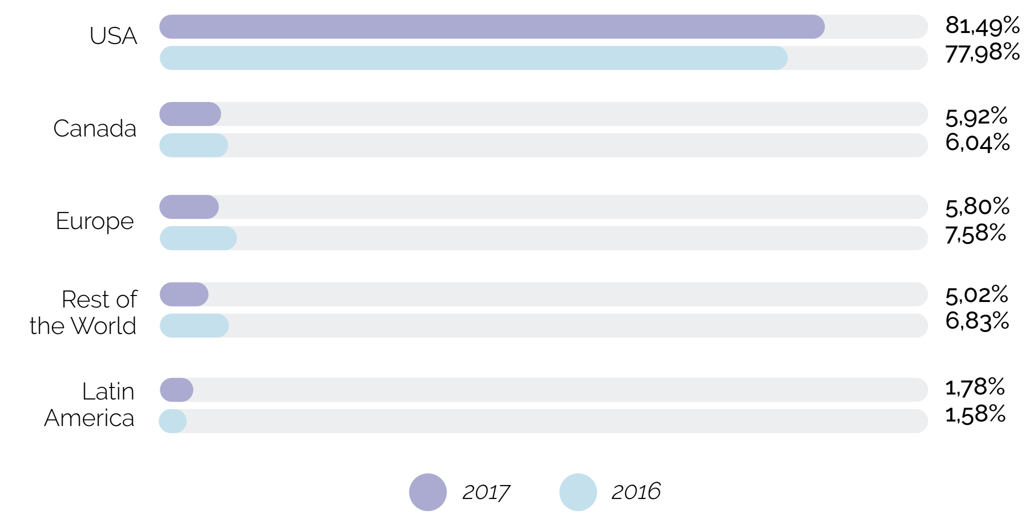




The United States accounted for 81.5% of stayover visitor arrivals in 2017 which was a 3.5[1] percentage point increase over the 78% share in 2016. This increase in share was due to the significant growth in the number of visitors from the United States coupled with decline figures recorded from Europe (1.78 percentage point decrease) and the Rest of the World (1.81 percentage point decrease).

Canada passed Europe as the marketing region with the second highest percent share, accounting for 5.9% of visitors. Latin America accounted for 1.8% of visitors; this was a 0.20 percentage point increase over 2016.

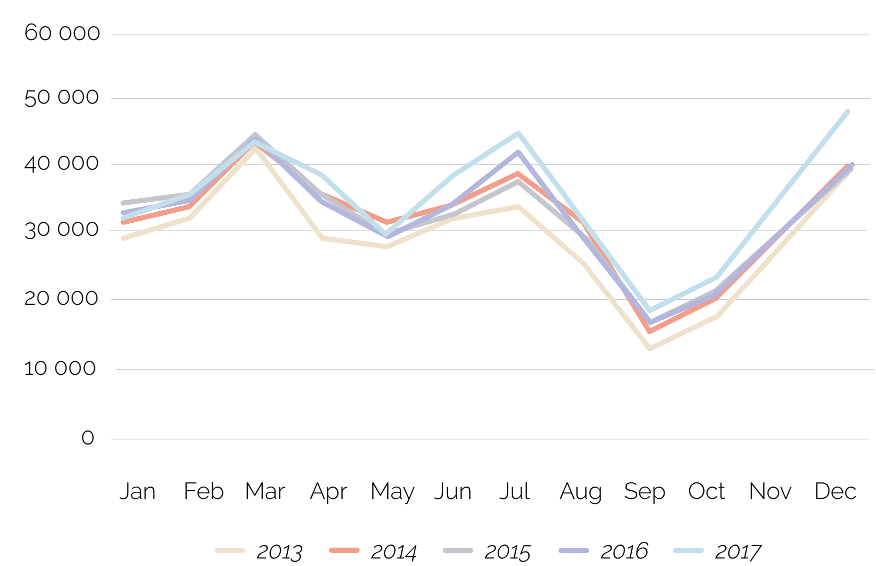
Figure 12: Marketing Region Percent Share of Total Stayover Arrivals



In December 2017 the Cayman Islands welcomed 49,003 stayover visitors. This was the most substantial number of visitors in the destination for any single month in recorded history. Previously in 2017, the record was broken with June recording 45,642 visitors. Before the multiple record-breaking 2017, the previous highest month was March 2015.

Not only was December the best December in recorded history, but seven other months were also record- breaking months (April and June – December).

Figure 13: Visitor Arrivals by Month



The destination experiences monthly seasonality in visitor arrivals. Economically, ecologically and socially, seasonality can have many different influences in the destination.

But, it may also provide a time for both the environment and the destination to recover from the stress of the peak season(s). Seasonality is, according to Butler (1994) "a temporal imbalance in the phenomenon of tourism".

Source: Cayman Islands Immigration Department

This report expresses seasonality in terms of the number of visitors. The causes of seasonality for visitor arrivals to the destination are mainly natural (e.g. temperature and snowfall).

When looking on the day of arrival in the Cayman Islands, the data showed that 109,454 visitors arrived on a Saturday in 2017 which represents just over 1 in every 4 visitors or 26.2%. This was despite only 19.4% or just under 1 in every 5-inbound airline seats entering the destination on a Saturday.

Figure 14: Stayover Visitor Arrivals by Day of the Week

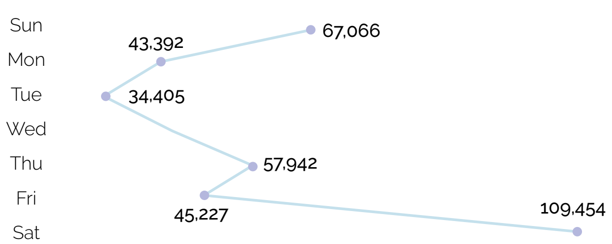


Figure 15: Comparison of Visitor Arrivals and Inbound Seats by day of the Week, 2017

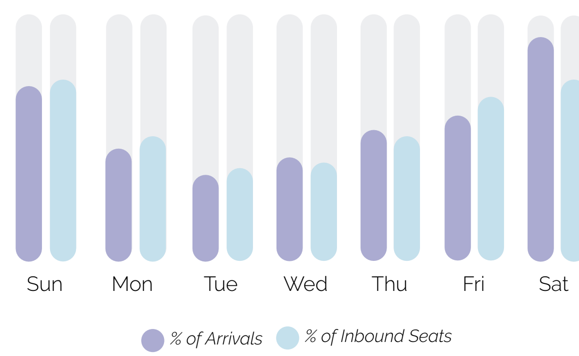
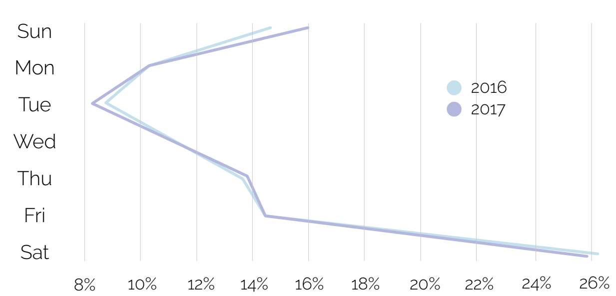


Figure 16: Percent Share of Visitor Arrivals by Day of Week



Source: Cayman Islands Immigration Department

When comparing the day of travel, a higher percentage of visitors traveled on Sundays in 2017 compared to 2016. Thursday had a small increase in 2017; all other days had a decrease in the share of visitation. The percent of inbound airline seats on Sundays also had the largest percentage increase. Thursdays and Fridays were the only other days with increases in percent share of inbound seats.

CRUISE PASSENGER ARRIVALS

According to the Cruise Lines International Association (CLIA), the industry recorded an estimated 25.8 million passengers worldwide in 2017 which was a 4.5% increase over 2016. The Caribbean region received 34.5% of all cruise passengers worldwide and was followed by the Mediterranean with 15.8%. Cruise passengers came from around the world with the US leading the way followed by China, Germany and the United Kingdom.

In 2017, the Cayman Islands saw 1,728,444 cruise passengers visiting the destination. This was a 0.97% increase when compared to 2016 and represented the highest number of cruise passenger arrivals since 2006.

Cruise passenger arrivals to the destination declined by 9.3% for the first eight months of 2017 and increased by 24.3% in the last four months of the year. The Cayman Islands received unscheduled cruise calls over the last four months of 2017 because of Caribbean ports impacted during the Hurricane season.

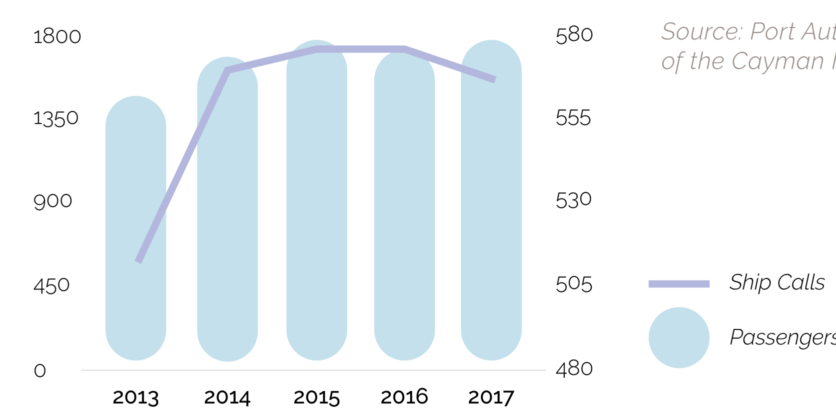
The number of cruise ships that had passengers disembarking decreased from 575 in 2016 to 569 in 2017.

Table 11: Cruise Passenger Arrivals and Ship Calls

YEAR	Ship Calls	Passengers	Passenger % YOY Diff
2013	481	1,375,872	-8.72%
2014	561	1,609,555	16.98%
2015	573	1,716,812	6.66%
2016	575	1,711,849	-0.29%
2017	569	1,728,444	0.97%

The destination had the 4th highest number of cruise passengers in the Caribbean region in 2017.

Figure 17: Cruise Passenger Arrivals and Ship Calls



Source: Port Authority of the Cayman Islands

December had the highest number of cruise passengers who arrived in the Cayman-Islands in 2017, with 221,634 or 13.0%. June had the lowest percent of cruise passenger arrivals at 5.30%. The winter months of January, February, March and December accounted for 46.3% of passenger arrivals to the destination.

Figure 18: Cruise Passenger Arrivals by Month

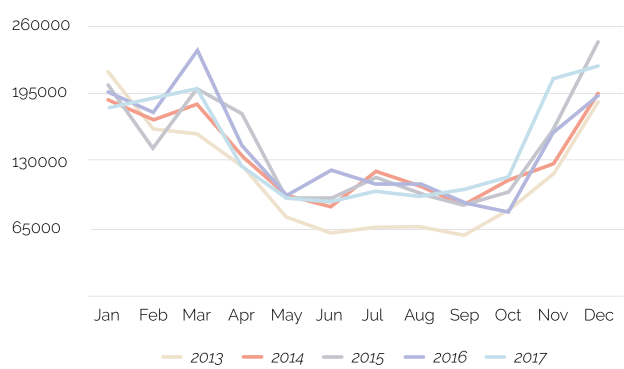
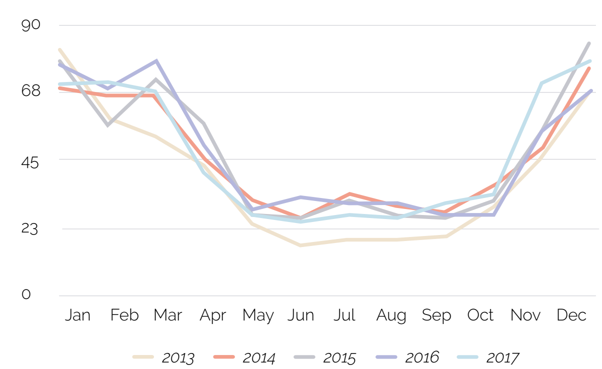


Figure 19: Cruise Ship Calls by Month



As with passenger arrivals, the month of December had the most cruise ship calls (78). December was followed by January and November with the largest number of calls to the destination.

Carnival Corporation accounted for 51.6% of cruise passenger arrivals to the Cayman Islands in 2017. Carnival Corporation was followed by Royal Caribbean and MSC Cruises.

Figure 20: Major Cruise Corporations Cayman Islands Capacity, 2017

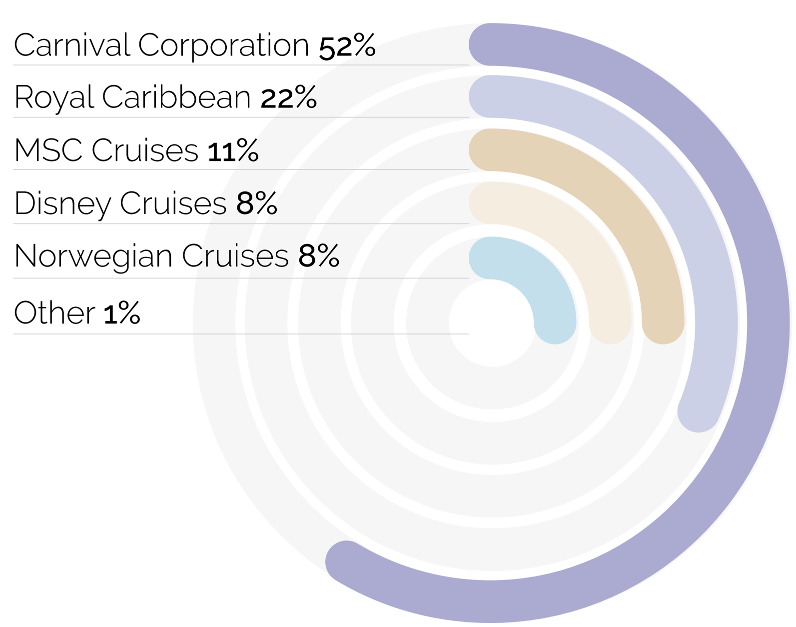


Table 14: Major Cruise Corporations Cayman Islands Capacity

	Passengers		% Share	
	2016	2017	2016	2017
Carnival Corporation	896,741	891,459	52.39	51.58
Royal Caribbean	409,480	374,834	23.92	21.69
MSC Cruises	118,895	190,544	6.95	21.69
Disney Cruises	135,572	131,602	7.92	7.61
Norwegian Cruises	133,366	129,877	7.79	7.51
Other	17,472	10,128	1.02	0.59
TOTAL	**1,711,526**	**1,728,444**	**100.0**	**100.0**

US citizens accounted for 69.2% of the cruise passengers that entered the Cayman Islands; this is followed by Continental Europe and Latin America with 12.1% and 7.4% respectively.

Within Continental Europe, the top two countries were Germany (4.0%) and Italy (2.1%), while in Latin America the top two nationalities were Colombia (1.7%) and Mexico (1.4%).

Figure 21: Nationality of Cruise Passengers by CIDOT Marketing Regions (2017)

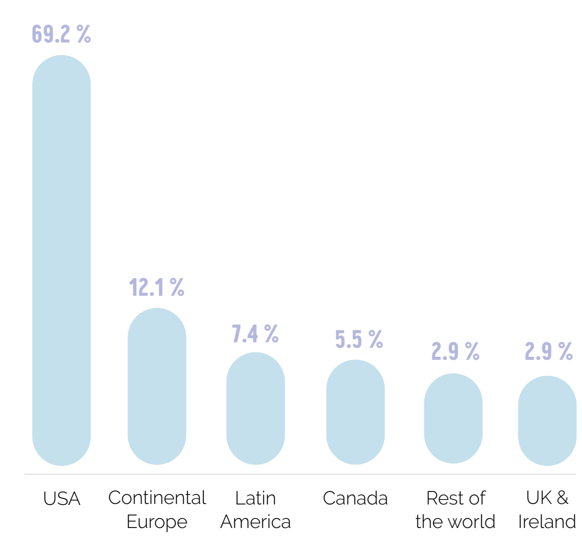


Table 12: Top 10 Nationality of Cruise Passengers (2017)

COUNTRY	REGION	PERCENT SHARE
United States	USA	69.2%
Canada	Canada	5.5%
Germany	Continental Europe	4.0%
United Kingdom	United Kingdom & Ireland	2.7%
Italy	Continental Europe	2.1%
Colombia	Latin America	1.7%
Mexico	Latin America	1.4%
Brazil	Latin America	1.3%
France	Continental Europe	1.3%
Spain	Continental Europe	1.1%

The top ten nationalities accounted for 90.4% of cruise passengers that enter the Cayman Islands. Continental Europe accounted for four of the top 10 countries.

Source: Port Authority of the Cayman Islands

Source: Paul Tibbetts

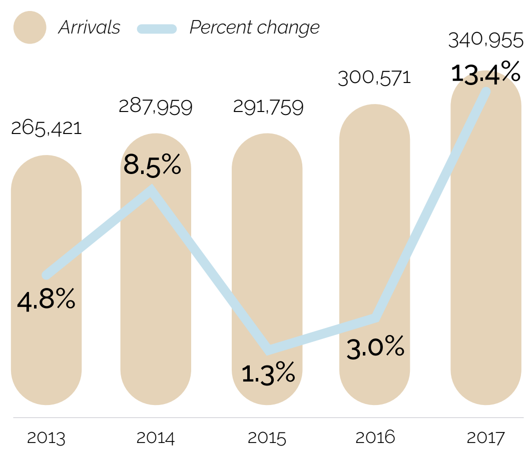
MARKET HIGHLIGHTS

VISITCAYMANISLANDS.COM / 2017

UNITED STATES

Overview

Figure 22: US Annual Arrivals (2013-2017)



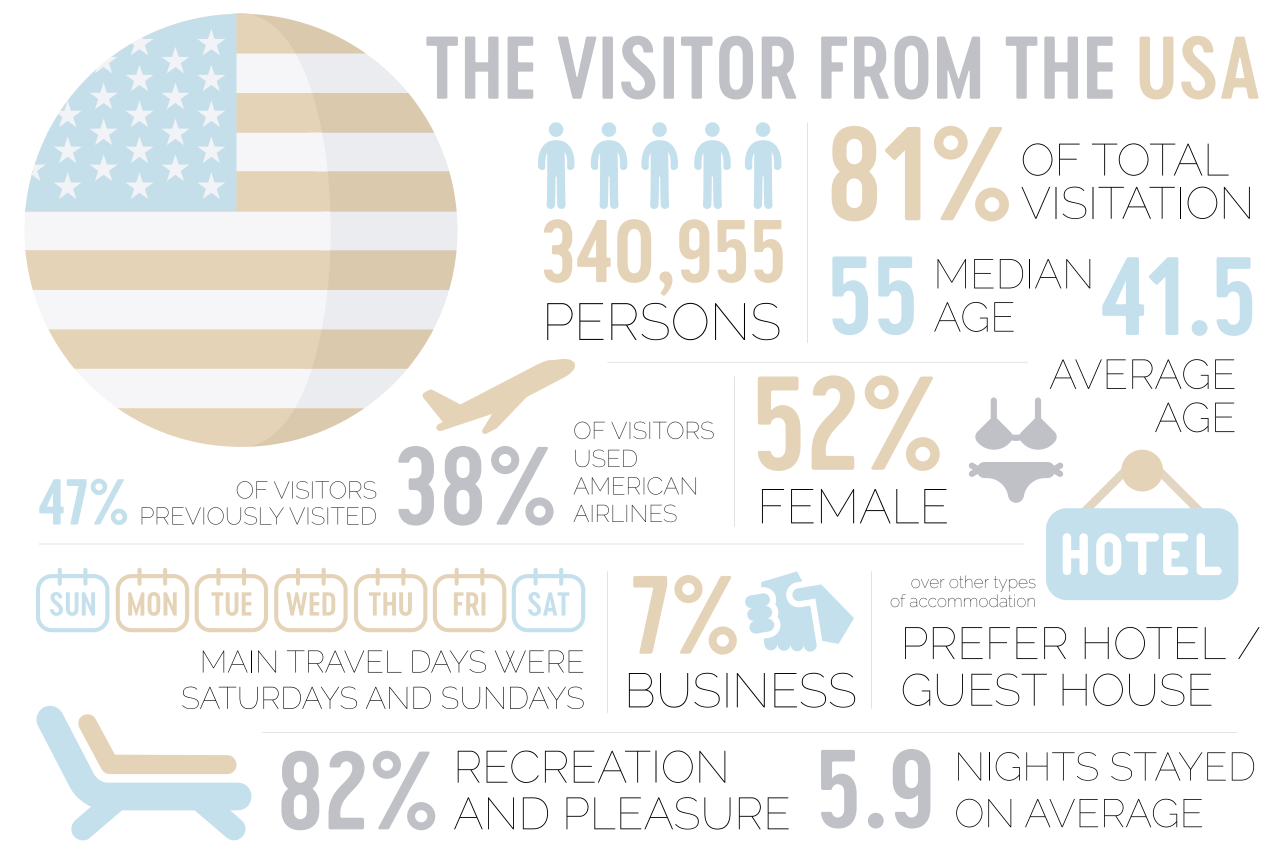
2017 could be described as the year of records for the United States region. From a Cayman Islands perspective, 2017 was another record year for arrivals from the United States, up 13.4% from the previous record set in 2016. Consumer confidence is a driving factor in tourism. The USA saw the consumer confidence index finish the year at 122.1, which was slightly lower than the 17-year high of 128.6 hit in November. Several factors drove consumer confidence. From a Wall Street perspective, the end of 2017 marked the 102nd month of a historic bull market which is the third largest in history. The Dow Jones industrial average finished at a record high, just below 25,000. Unemployment in the U.S. was at 4.1 percent, the lowest level since 2000 and the U.S. economy gained jobs for 86 consecutive months--the longest streak in US history according to the Labor Department going back to 1939. According to the Conference Board, 60 percent of Americans plan on taking a vacation in the next six months.

The US Department of Commerce reported 87.7 million trips were taken abroad by US citizens in 2017. This was a 9.3% increase over 2016. The Caribbean region grew by 5.6% and accounted for 9.5%.

Stayover visitation from the United States reached a record high of 340,955 in 2017. According to the US Department of Commerce the Caribbean region recorded its eighth consecutive year of growth for the market. The 13.4% growth for 2017 was also the highest growth rate since Hurricane Ivan recovery in 2006.

[1]Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office (NTTO)

Figure 23: 2017 US Stayover Visitor Profile



Source: CIDOT Visitor Exit Survey 2017, Cayman Islands Department of Immigration

The leading state for visitation from the US was Texas representing 10.4% (35,475 persons) of US arrivals and followed closely by the state of New York with 10.0% (34,119) and Florida with 9.2% (31,211).

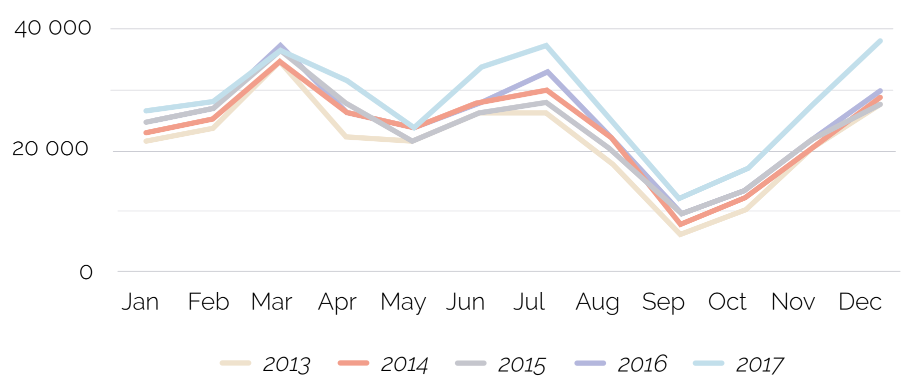
Figure 24: Top 10 US States for Visitor Arrivals to the Cayman Islands in 2017

Texas 10.4%
New York 10.0%
Florida 9.2%
New Jersey 4.9%
Illinois 4.6%
California 4.3%
Pennsylvania 3.6%
Massachusetts 3.6%
Virginia 3.4%
Ohio 2.9%

The main months of travel for US visitors in 2017 were July (45,642) and December (49,003). March has had the most visitor arrivals for the past eleven years but ranked third in 2017 with 44,056 stayover visitors.

In 2017, September and October continued to be the two months with the lowest number of visitors. December 2017 recorded just under three times more visitors than September 2017.

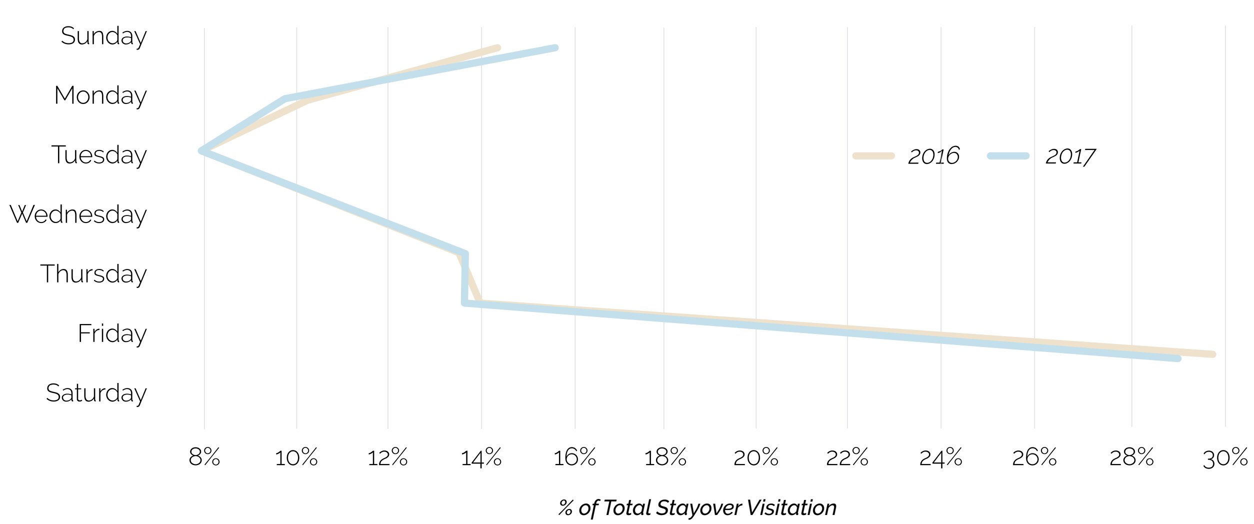
Figure 25: Seasonality of US Visitor Arrivals (2013-2017)



For the US Traveler, Saturday was the primary day of travel. 29.0% of US visitors travelled on a Saturday versus 7.9% who visited on a Tuesday. There was an increase in the percent share of visitors arriving at the destination on a Sunday in 2017 when compared to 2016. This increase resulted in a reduction in the percent share of visitors arriving on a Friday and Saturday.

In 2017, visitation from the US market peaked (in ranking order) in the weeks of 17 – 23 December, 24 – 30 December and 25 June – 1 July.

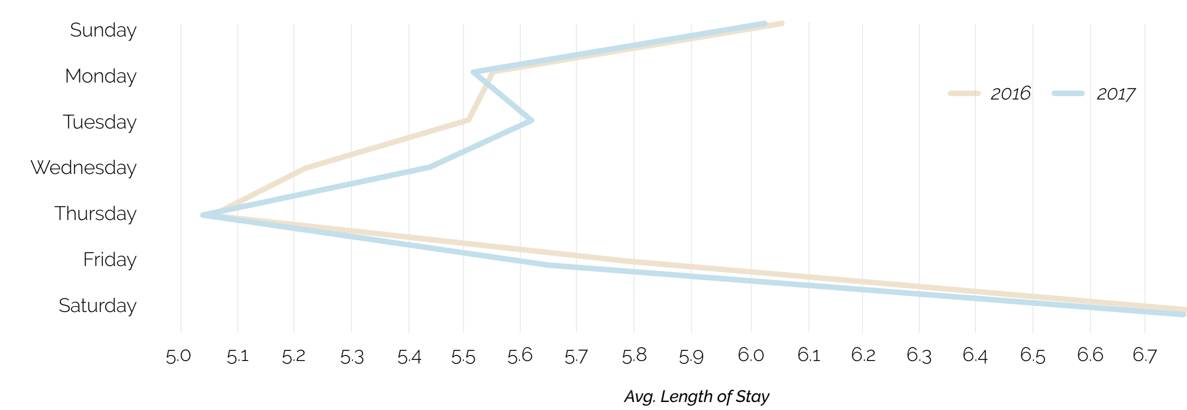
Figure 26: US Visitor Arrival by Day of Week



Source: Cayman Islands Immigration Department

Of those US visitors that travelled on a Saturday, they stayed the longest in the destination at 6.8 nights. Visitors that arrived at the destination on a Thursday stayed the shortest at 5.1 nights. Visitors arriving on a Tuesday and Wednesday stayed an average 0.2 nights longer in 2017 compared to 2016.

Figure 27: Average Nights Stayed by Day of Arrival for US Visitors



When looking at the day of arrival by the top ten (10) US states to the destination, Saturday was the highest for all states except for Florida where Friday was the primary day of arrival. For all states, Tuesday was the least day travelled on. The percent share of total visitors travelling on a Saturday reduced for eight of the top ten states in 2017 compared to 2016. Sunday travel percent share of visitation increased for all ten states.

Figure 28: Day of Arrival for Stayover Visitors from the Top Ten Ranking States

	SUN	MON	TUE	WED	THU	FRI	SAT
Texas	16.3%	10.0%	7.7%	12.0%	12.4%	11.5%	30.0%
New York	17.0%	12.1%	7.6%	9.1%	17.0%	16.1%	21.1%
Florida	11.7%	11.2%	7.8%	10.2%	20.1%	22.4%	16.7%
New Jersey	19.8%	9.1%	6.3%	8.0%	13.0%	10.9%	32.9%
Illinois	21.3%	7.8%	6.6%	13.9%	10.5%	10.6%	29.5%
California	16.6%	9.7%	8.6%	11.3%	12.6%	13.8%	27.5%
Pennsylvania	15.2%	8.1%	7.7%	10.8%	11.4%	11.2%	35.5%
Massachusetts	13.8%	8.1%	8.0%	9.5%	12.3%	11.7%	36.7%
Virginia	15.2%	9.5%	6.8%	10.2%	11.4%	10.3%	36.6%
Ohio	14.4%	8.0%	7.2%	9.5%	11.9%	13.6%	35.4%

The peak days of arrival for US stayover visitors in 2017 (ranking order) were 21 March, 25 March, and 23 December

US visitors primary purpose of visit was Recreation and Pleasure. Dive vacation for 2017 was the third-highest purpose of travel to the destination, but these visitors stayed the longest at 6.9 nights. Visiting Relatives led the category for repeat visitation at 67%.

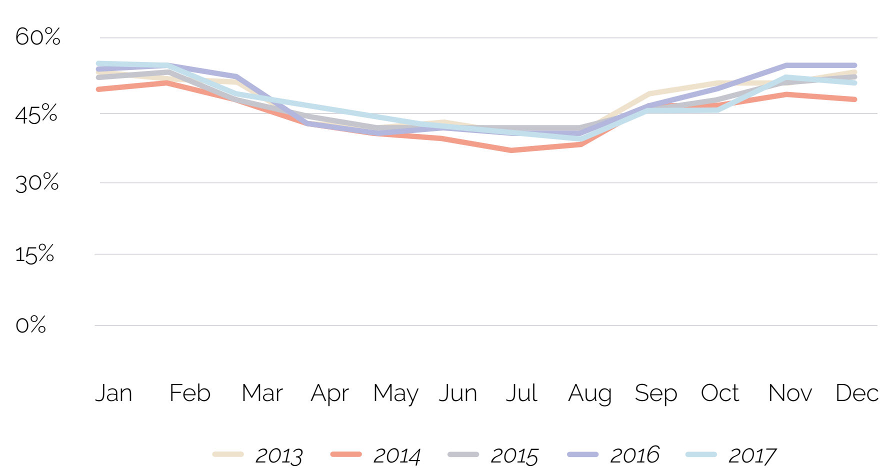
Table 13: US Arrivals by Purpose of Visit

		Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Wedding/ Honeymoon
ARRIVALS	2016	244,034 (81%)	7,001 (2%)	14,894 (5%)	13,391 (4%)	3,084 (1%)
	2017	281,206 (82%)	8,421 (2%)	16,641 (5%)	15,718 (5%)	3,942 (1%)
AVERAGE LENGTH OF STAY	2016	6.1	6.2	3.6	6.9	6.9
	2017	6.1	6.2	3.4	6.8	6.8
REPEAT VISIT	2016	46%	68%	61%	63%	19%
	2017	45%	67%	62%	61%	21%

The percent share of US visitors on a repeat visit declined in 2017 when compared to 2016 from October to December. These three months though recorded the highest percent growth rates in 2017.

Figure 29: Repeat Visitation from the US (Percent)

For the last five years repeat visitation from the US has been at its highest during the winter months. Peak months for first-time visitors to the destination were April to August.



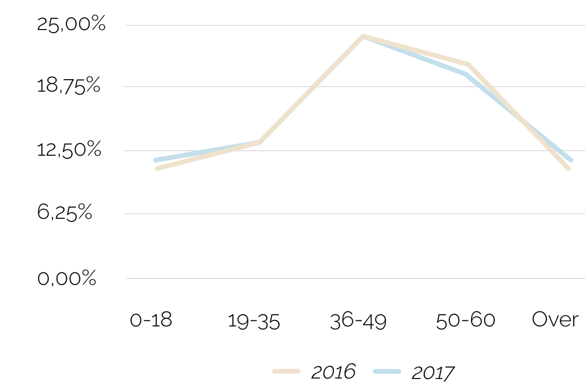
Source: Cayman Islands Immigration Department

For the US, the largest age group was 36-49 years old in 2017. This group accounted for 24.8% of US visitors to the destination. The largest increase by age group for the second consecutive year was the 0-18 category which grew by 16.0% in 2017. The 50-60 age group recorded growth of 10.3% which was the lowest growth rate.

Table 14: Age Distribution of US Visitors

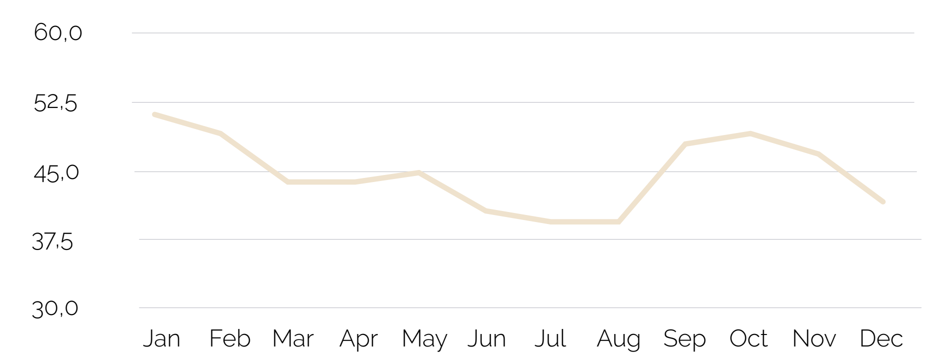
	Number of Visitors		Percent Share	
Age Group	2016	2017	2016	2017
0-18	50,612	58,725	16.84%	17.22%
19-35	55,403	63,314	18.43%	18.57%
36-49	74,021	84,664	24.63%	24.83%
50-60	69,433	76,565	23.10%	22.46%
Over 60	51,102	57,687	17.00%	16.92%
Total	300,571	340,955	100.00%	100.00%

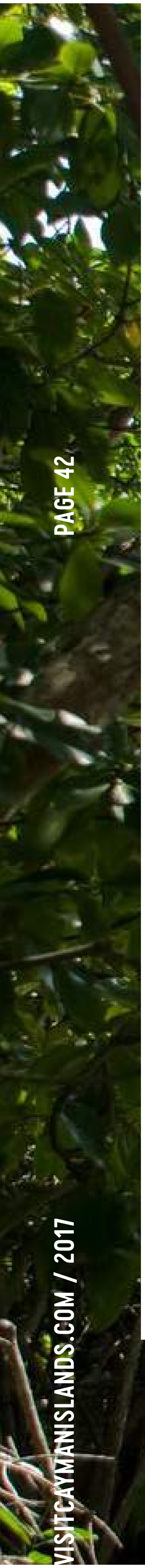
Figure 30: Age Distribution of US Visitors



The median age for the US visitor to the destination in 2017 was 45 years old. January recorded the highest median age at 51 years old. Lower median ages were recorded in the summer months of July and August at 40 years old.

Table 15: Age Distribution of US Visitors





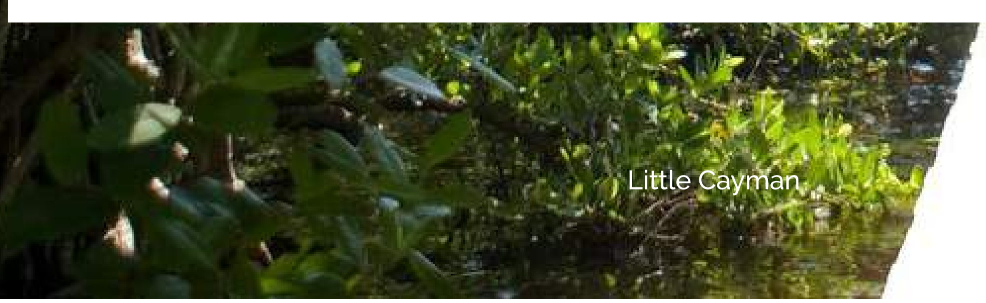
CANADA

Overview

Canada is back. 2017 was a bounce-back year for the Canadian market with several record-breaking months. It was the first year for the CIDOT new strategy in Canada of re-engaging with the travel trade, using data to drive media and activities, leading promotions with the Culinary theme and developing relationships with key airline partners.

In 2017, the Canadian economy shifted into high gear fueled by a growth of 4.5% in the second quarter alone. This was thanks to strong household spending as well as home construction and business investment posting its first increase in three years. The economy created the strongest 12-month job creation figure in a decade and interest rates saw the first rise for seven years, showing that the economy no longer required the rate cuts that were put in place to reduce the fallout of the energy downturn. Consumer confidence showed strong increases over 2016 as well. The exchange rate stabilised from late 2016 onwards and started increasing against the U.S. dollar. With an overall growth of 2.6% in 2017, the economy will continue to support the growth in outbound travel. Air Canada increased their winter 17/18 capacity to 6 flights a week from Toronto.

The focus of the sales, marketing, advertising and PR teams was to deliver on the new strategy. The team successfully connected with consumers, key airline partners, travel trade, media and influencers across the country to ensure key messages were communicated so that Cayman remained top-of-mind throughout the crucial booking seasons. CIDOT continued to build stronger relations and increased awareness of the Cayman Islands with the travel agents while also sup-porting the travel trade through education, training and sales incentives.



Little Cayman

The destination welcomed 24,757 stayover visitors from Canada in 2017. This was a growth of 6.4% when compared to 2016. This growth was a recovery for the Canada market which has seen a decline in four of the last five years before 2017.

Figure 31: Canada Annual Arrivals (2013-2017)

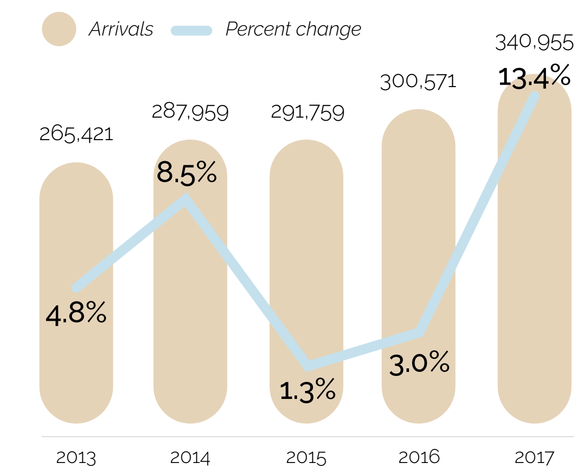
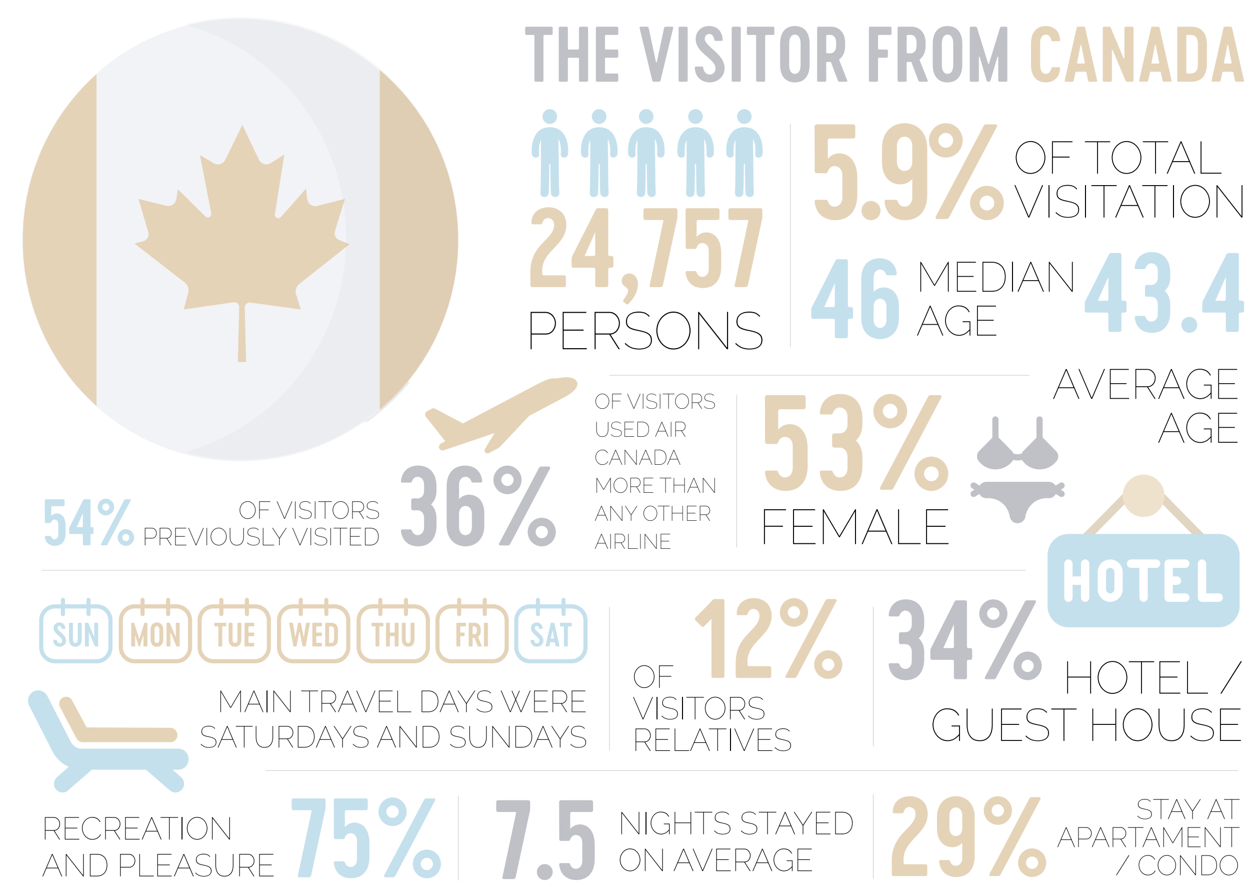


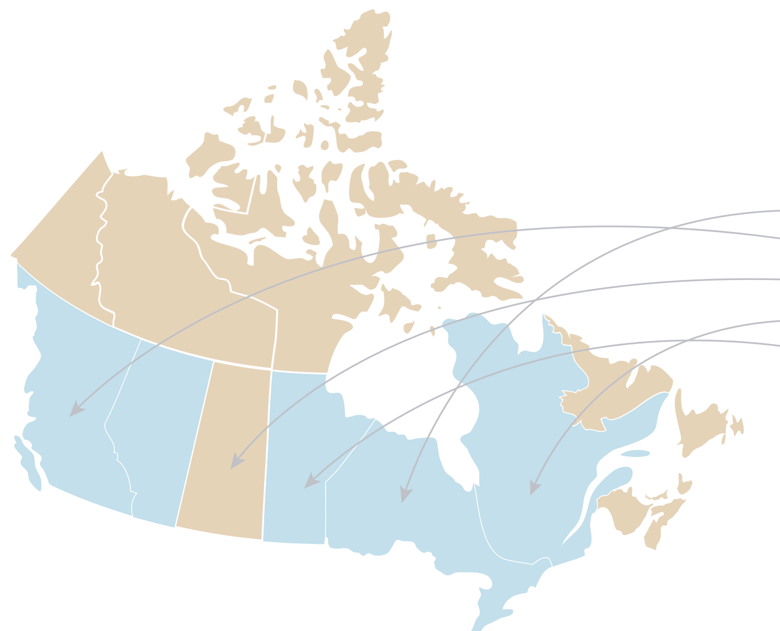
Figure 32: 2017 Canada Stayover Visitor Profile



Source: Cayman Islands Immigration Department

The province of Ontario proved to be the largest share for Canadian stayover visitors at 60.1% (14,875). British Columbia and Alberta followed with 10.2% (2,530) and 9.3% (2,302) respectively.

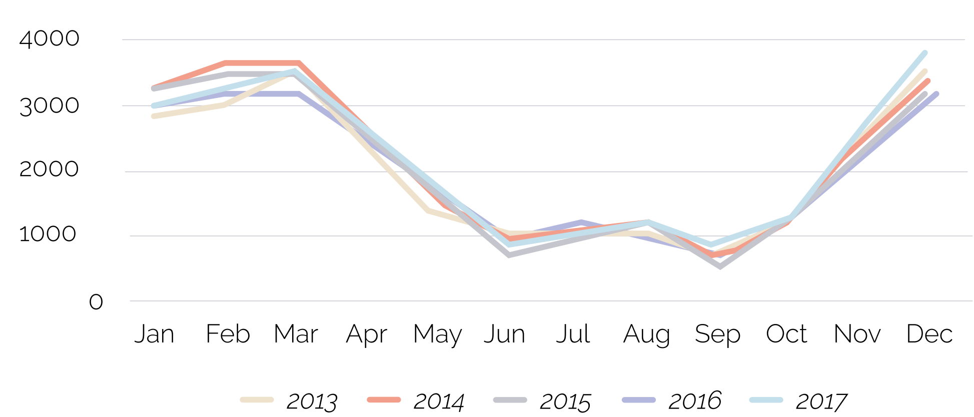
Figure 33: Top 5 Canadian Provinces - Stayover Arrivals to the Cayman Islands 2017



Stayover visitation from Canada continued to show a high level of seasonality in 2017. The number of visitors ranged from a high of 3,815 visitors in December to a low of 813 visitors in September. The trend over the last five years shows that the winter months of December to March produce the highest arrivals whilst the summer months of June to September produced the lowest period for arrivals from Canada.

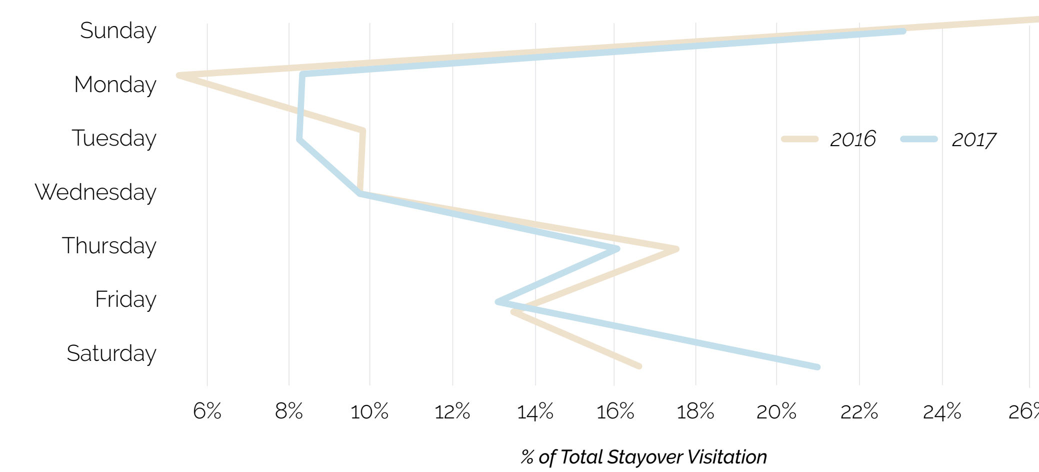
In 2017, visitation from the Canada market peaked (in ranking order) in the weeks of 17 – 23 December, 24 – 30 December and 12 – 18 March.

Figure 34: Seasonality of Canada Visitor Arrivals



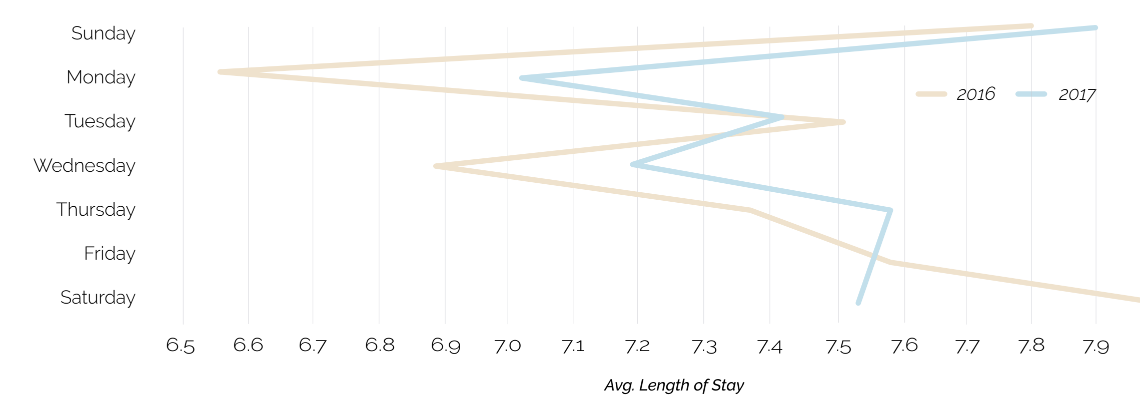
Sunday is the primary day of arrival into the destination for Canadian travellers. In 2017, 23.1% of visitors travelled on a Sunday. This was a 3.6 percentage point decline over the 26.7% of visitors who visited on a Sunday in 2016. The share of visitors travelling to the destination on a Saturday increased by 4.4 percentage points to 21.1% in 2017. The changes in airline schedule by Air Canada affected visitation pattern.

Figure 35: Canada Visitor Arrival by Day of Week



With the increase in the percent share of Canadian visitors arriving on a Saturday, data has shown that these visitors are staying shorter (7.5 night) on average. Whereas visitors who arrive on a Sunday is remaining longer in the destination (7.9 night).

Figure 36: Average Nights Stayed by Day of Arrival for Canada Visitors



The peak days of arrival for Canadian stayover visitors (ranking order) in 2017 were 2 December, 28 December and 12 March.

Source: Cayman Islands Immigration Department

Visitors from the top provinces in Canada travel mainly on a Saturday or Sunday. Alberta and Manitoba had the highest tendency to travel on a Sunday or Thursday and also use WestJet more than other airlines. WestJet scheduled flights on Sunday and Thursday direct to the destination. Visitors from Ontario and British Colombia used Air Canada more than other airlines.

Table 16: Day of Arrival for Stayover Visitors from the Top 5 Canadian Provinces

	SUN	MON	TUE	WED	THU	FRI	SAT
Ontario	22.7%	8.6%	8.0%	10.2%	15.9%	13.7%	21.0%
British Columbia	21.2%	8.5%	8.8%	9.6%	14.0%	13.2%	24.8%
Alberta	25.9%	7.9%	7.3%	8.0%	20.1%	11.1%	19.7%
Quebec	21.2%	8.5%	10.5%	8.6%	12.4%	14.4%	24.4%
Manitoba	30.9%	5.5%	9.3%	6.1%	25.8%	8.0%	14.4%

As with their American counterparts, Canadian traveller's primary purpose of visit at 75% was Recreation / Pleasure. The most significant difference between the two nations was their second leading purpose of visit. For Canada, the second leading purpose was visiting relatives at 12%. Visiting relatives also recorded the highest length of stay at 8.7 nights as well as the largest percent of repeat visitors at 65%.

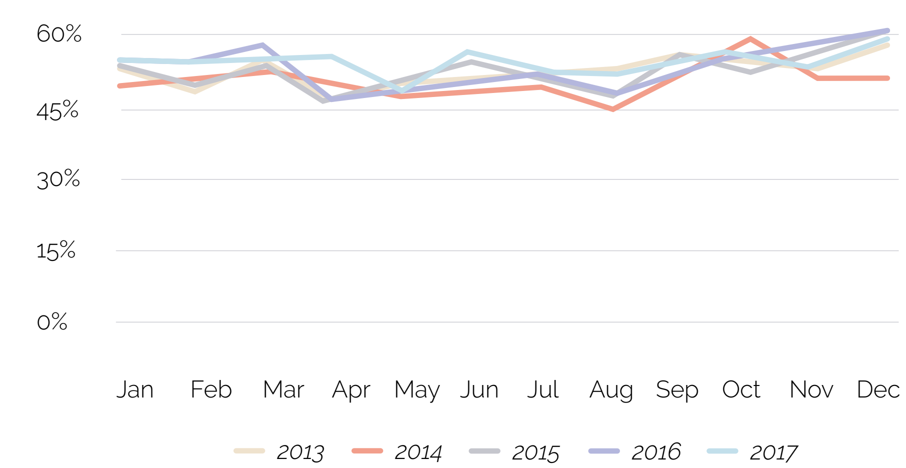
Table 17: Canada Arrivals by Selected Purpose of Visit

		Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Wedding/ Honeymoon
ARRIVALS	2016	17,366 (75%)	2,778 (12%)	994 (4%)	592 (3%)	133 (1%)
	2017	18,533 (75%)	2,995 (12%)	1,154 (5%)	728 (3%)	116 (0%)
AVERAGE LENGTH OF STAY	2016	7.7	8.4	3.7	8.1	6.8
	2017	7.7	8.7	3.7	7.8	6.6
REPEAT VISIT	2016	52%	65%	58%	56%	30%
	2017	52%	65%	61%	55%	34%

Repeat visitation for Canada recorded increases from each of the last four years. The 54% of repeat visitation in 2017 was a five-year high. Repeat visitation was over 50% for all months in 2017 except May.

Source: Cayman Islands Immigration Department

Figure 37: Repeat Visitation from Canada (Percent)



The 50-60 age group was the largest in 2017 at 24.0% for the Canadian market. This was a change from 2016 when the 36-49 group had the largest share. The 50-60 age group recorded the most significant increase at 11.8%. The 19-35 age groups saw a decline in visitation of 1.4%.

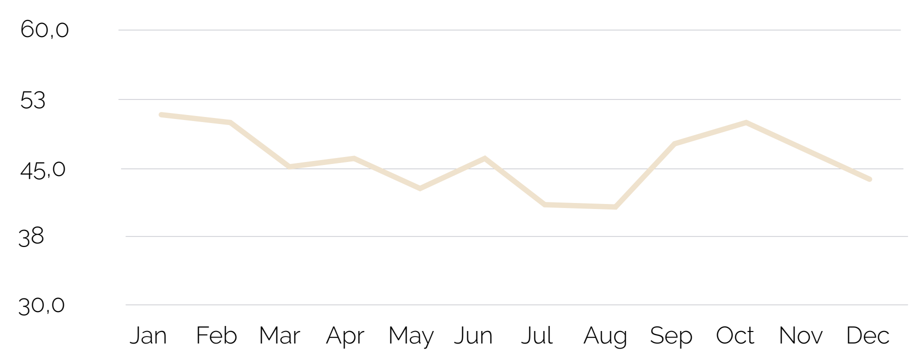
Table 18: Age Distribution of Canadian Visitors

	Number of Visitors		Percent Share	
Age Group	2016	2017	2016	2017
0-18	3,402	3,571	14.62%	14.42%
19-35	4,646	4,580	19.96%	18.50%
36-49	5,420	5,773	23.29%	23.32%
50-60	5,321	5,949	22.86%	24.03%
Over 60	4,485	4,884	19.27%	19.73%
Total	23,274	24,757	100.00%	100.00%

Figure 38: Age Distribution of Canadian Visitors

As with the US market, the Canadian market saw the highest median age in January and February at 51 and 50 years old respectively. Lower median ages were recorded in the summer months of July and August at 41 years old.

Figure 39: Median Age of Canadian Visitors in 2017[1]



UK AND IRELAND

Overview

A new start for the United Kingdom and Ireland. The Department of Tourism achieved multiple marketing highlights during the year which included the first Cayman Islands TV advertising campaign on U.K. screens, the U.K. travel industry's first ever live Facebook training session, the production of several new digital videos and an editorial in the National Geographic Traveller magazine resulting from the Visiting Journalist programme and the first "influencer" group visit from the region.

Arrivals to the Cayman Islands fell during 2017, mainly due to the weakness of the Pound Sterling against the U.S. dollar. But with new strategies and tactics, the United Kingdom and Ireland is off to a great start for future growth.

The destination welcomed 15,259 stay-over visitors from the United Kingdom and Ireland market in 2017. This market recorded a decline of 5.46% when compared to 2016.

Figure 40: The UK and Ireland Annual Arrivals (2013-2017)[2]

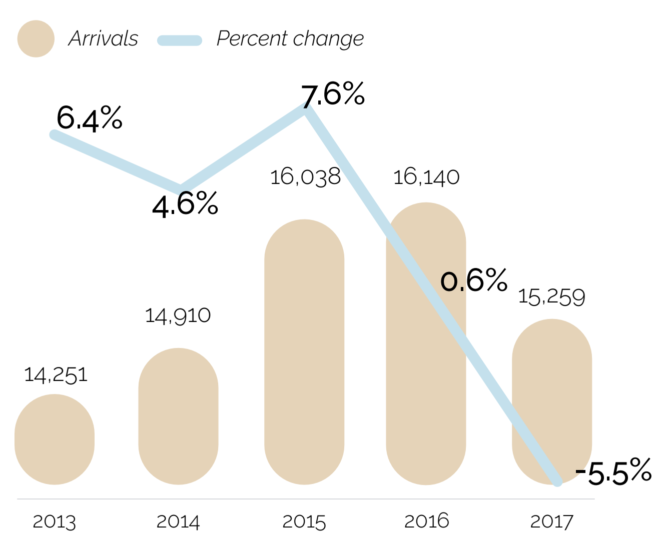
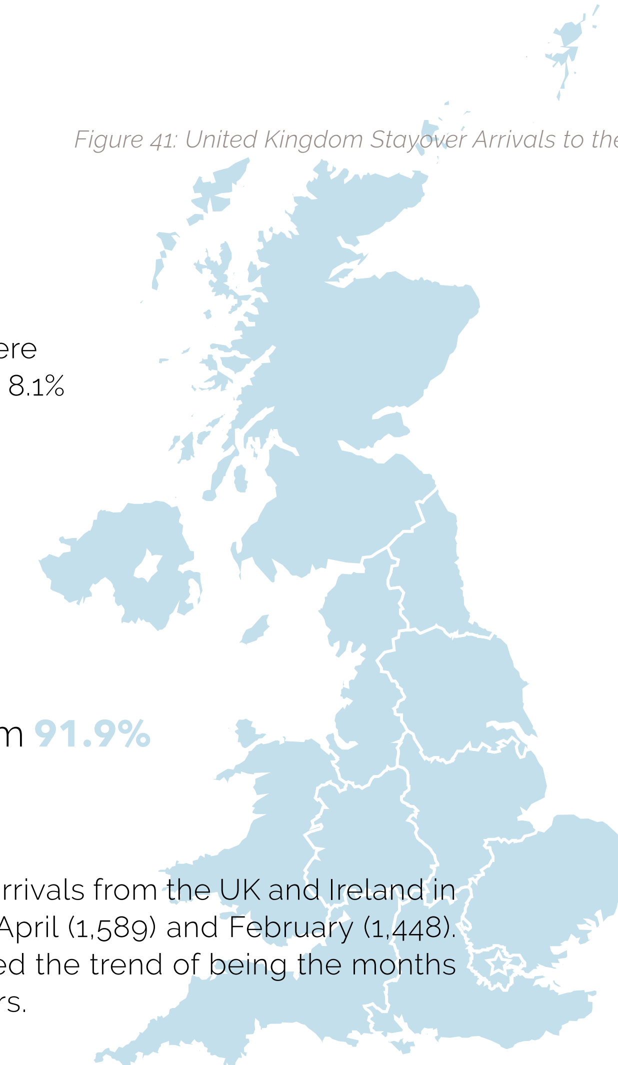


Figure 41: United Kingdom Stayover Arrivals to the Cayman Islands

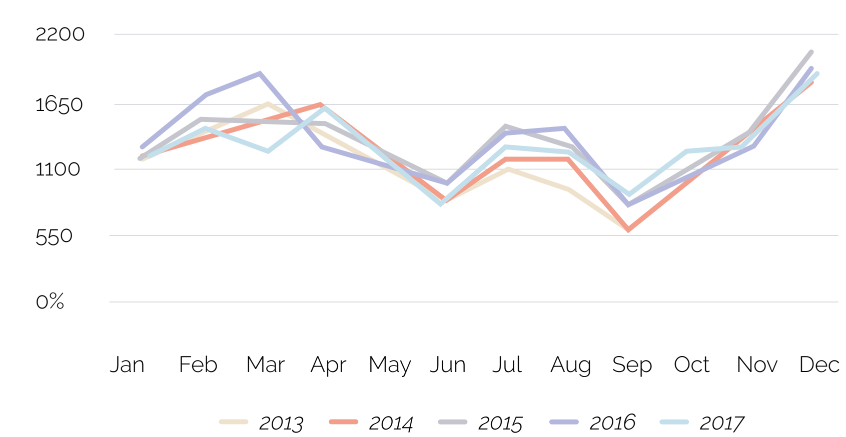


91.9% (14,017) of the visitors were from the United Kingdom and 8.1% (1,242) from Ireland.

The months with the highest arrivals from the UK and Ireland in 2017 were December (1,870), April (1,589) and February (1,448). June and September continued the trend of being the months with the lowest arrival numbers.

In 2017, visitation from the UK and Ireland market peaked (in ranking order) in the weeks of 17 – 23 December, 2 – 8 April and 24 – 30 December.

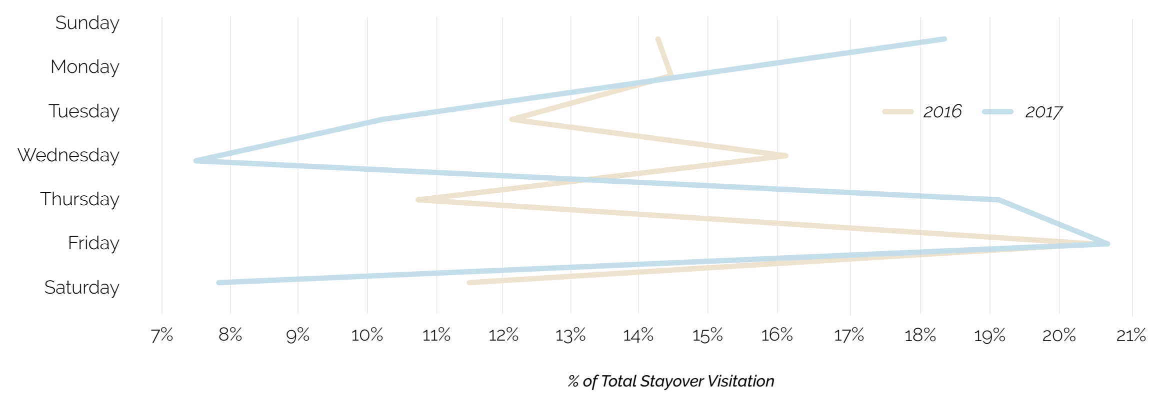
Figure 42: Seasonality of UK and Ireland Visitor Arrivals[1]



[1]Cayman Islands Immigration Department

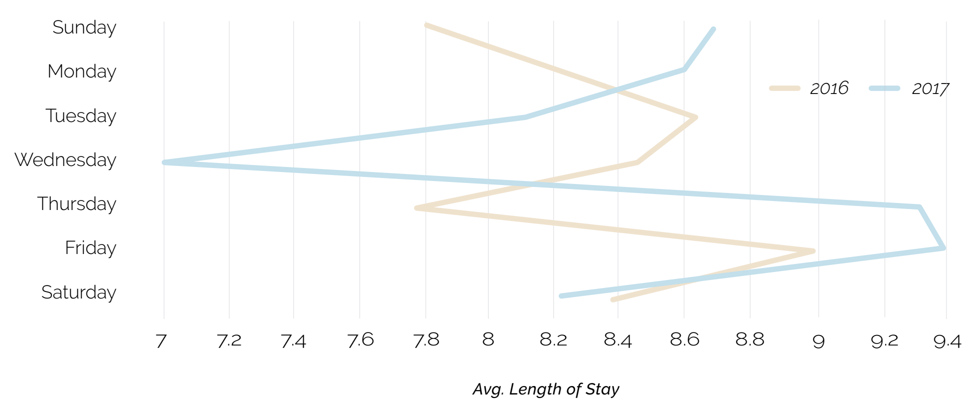
The UK Traveller's primary day of arrival into the destination was Friday. In 2017, 21.1% of visitors travelled to the destination on a Friday. Wednesday was the least most travelled day; it was only 7.3% of total arrivals. The large shifts in the share of visitors travelling on Wednesday, Thursday and Sunday were as a result of airlift schedule changes.

Figure 43: UK and Ireland Visitor Arrivals by Day of Week



Visitors from the United Kingdom and Ireland who arrived in the destination on Thursday (9.34 nights) and Friday (9.27 nights) stayed the longest. Visitors arriving on Wednesday (6.98 nights) stayed the shortest.

Figure 44: UK and Ireland Visitor Arrivals by Day of Week



The peak days of arrival for UK and Ireland stayover visitors in ranking order for 2017 were 21 December, 22 December and 17 December.

Both the United Kingdom and Ireland shared a similar travel pattern with regards to the day of travel to the Cayman Islands. Thursday, Friday and Sunday were their main days for travel for this region in 2017.

Source: Cayman Islands Immigration Department

This trend was in line with the direct flight schedule from London. Almost one in every two UK and Ireland visitors used British Airways who had direct flights on the primary travel days.

Figure 45: Day of Arrival for Stayover Visitors from the UK and Ireland

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
United Kingdom	19.0%	15.3%	10.3%	7.0%	19.6%	21.4%	7.6%
Ireland	15.6%	16.8%	9.7%	11.2%	18.6%	18.4%	9.7%

The primary purpose of visit for the UK region was Recreation / Pleasure at 63%. Like Canada, the second ranked purpose was visiting relatives. This category recorded 27% and had the most extended length of stay at 10.3 nights as well as the largest percent of repeat visitors at 67%.

Table 19: UK and Ireland Arrivals by Selected Purpose of Visit

		Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Wedding/ Honeymoon
ARRIVALS	2016	63%	24%	9%	1%	1%
	2017	64%	27%	10%	1%	0%
AVERAGE LENGTH OF STAY	2016	8.7	10.3	3.9	9.4	7.1
	2017	9.0	10.3	4.1	9.8	7.3
REPEAT VISIT	2016	52%	68%	59%	52%	26%
	2017	53%	67%	59%	57%	29%

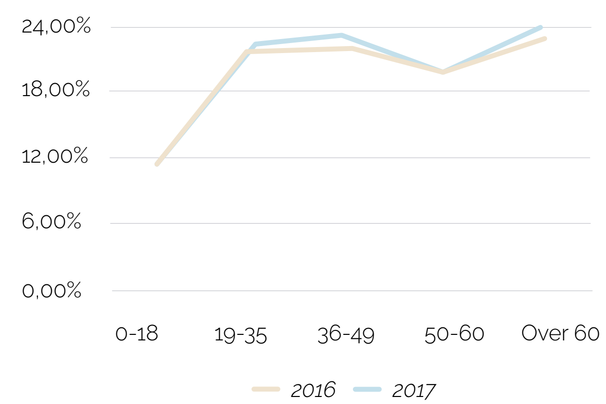
Local Taxi Representative - Paula Ebanks

The largest age category of UK visitors in 2016 and 2017 was the Over 60 category which accounted for 22.9% of the visitation. For the UK and Ireland region, age is evenly distributed across all groups.

Table 20: Age Distribution of UK and Ireland Visitors

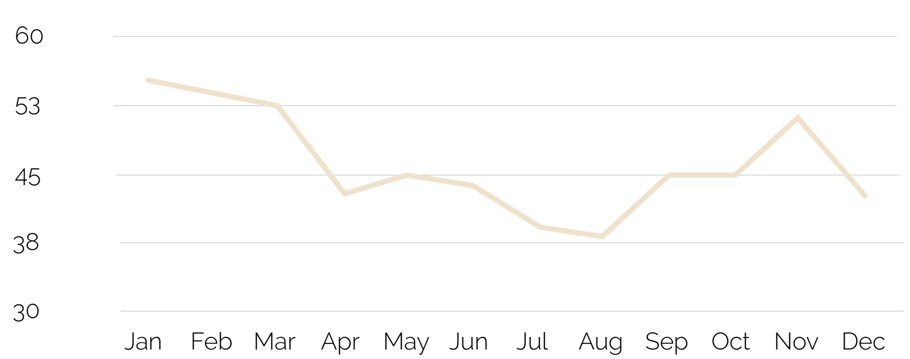
Age Group	Number of Visitors 2016	Number of Visitors 2017	Percent Share 2016	Percent Share 2017
0-18	1,891	1,761	11.72%	11.54%
19-35	3,553	3,382	22.01%	22.16%
36-49	3,614	3,488	22.39%	22.86%
50-60	3,234	3,130	20.04%	20.51%
Over 60	3,848	3,498	23.84%	22.92%
Total	16,140	15,259	100.00%	100.00%

Figure 46: Age Distribution of UK and Ireland Visitors



The median age for the UK and Ireland visitor to the destination was 46 years old. January recorded the highest median age in 2017 at 55 years old. Lower median ages were recorded in the summer months of July and August at 39 and 38 years old respectively.

Figure 47: Median Age of UK and Ireland Visitors in 2017



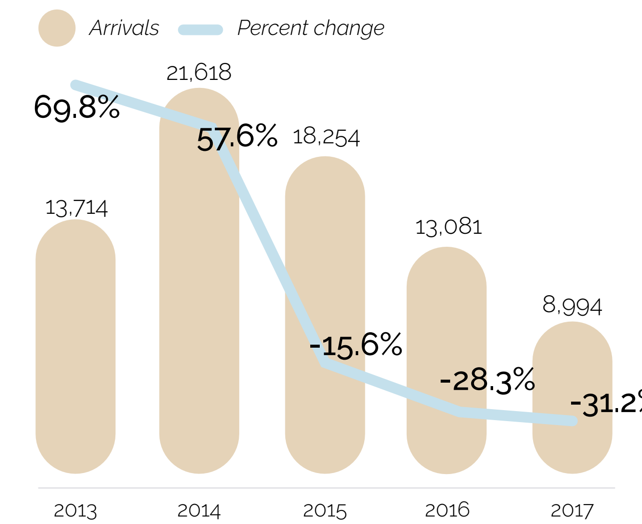
CONTINENTAL EUROPE

Overview

The destination welcomed visitors from 49 of the 53 countries categorized in the European region by UNWTO.

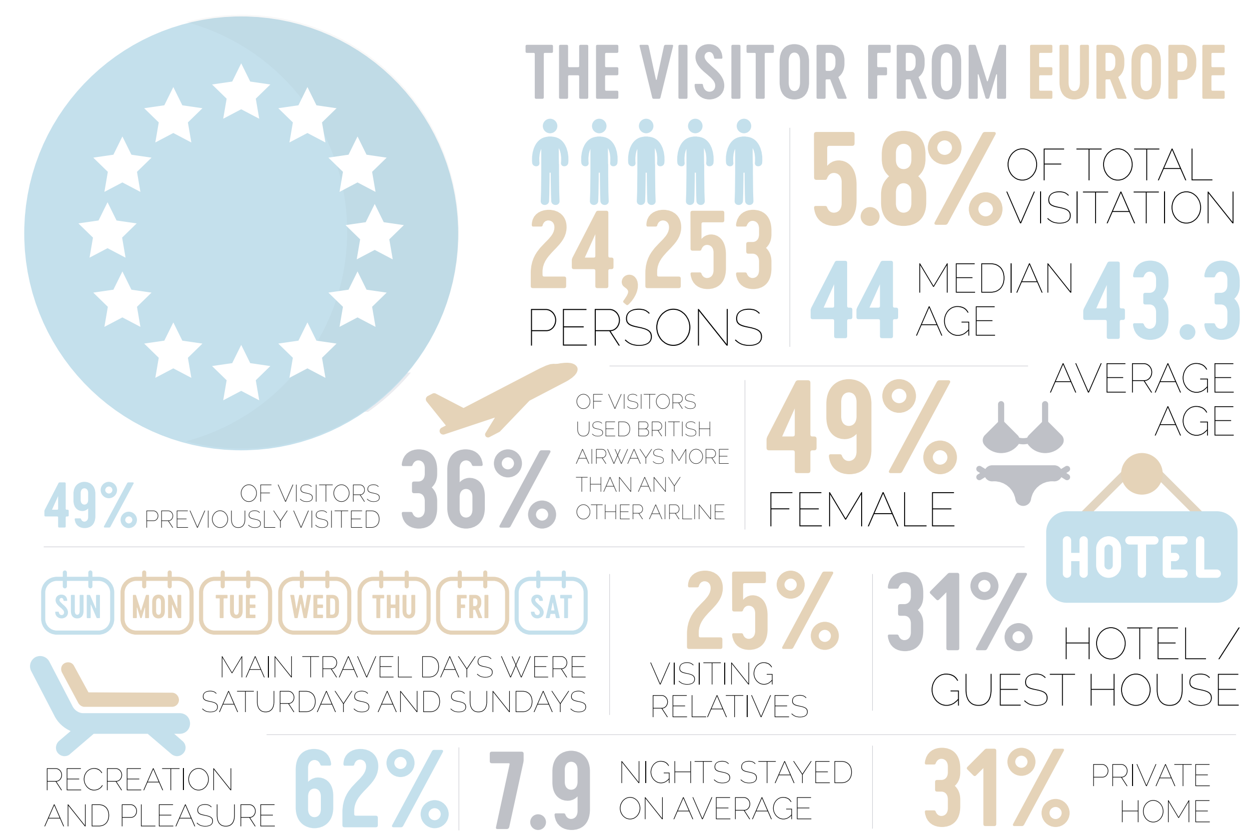
Stayover visitation from Continental Europe continued its downward trend in 2017 with a 31.2% decline. Regional arrivals to the Cayman Islands fell mainly due to the weakness of the Euro against the U.S. dollar. Another reason for this decline was due to the reduction of overnight travel to Cuba via Cayman Airways.

Figure 48: Continental Europe Annual Arrivals (2013-2017)



Source: Cayman Islands Immigration Department

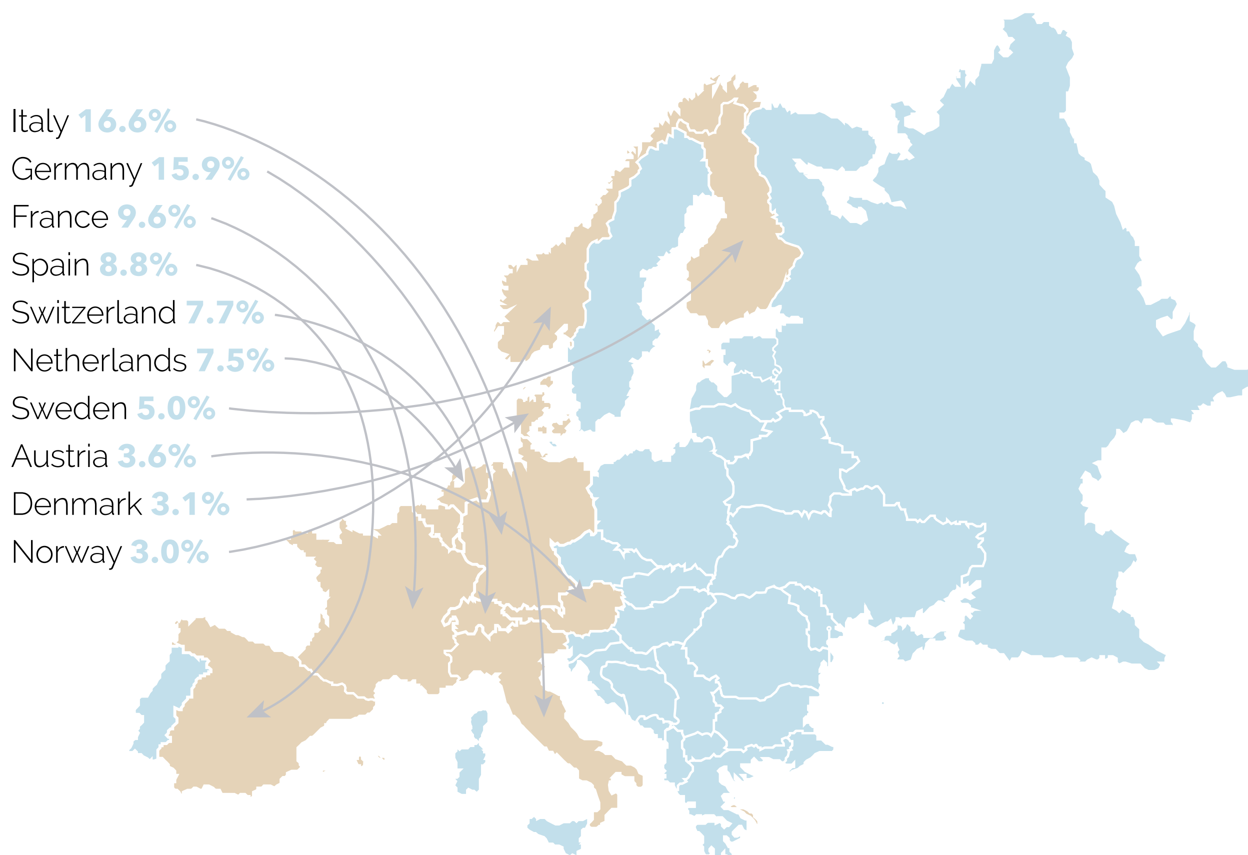
Figure 49: 2017 European Stayover Visitor Profile (Includes UK & Ireland)



Italy was the top country for visitor arrivals from Continental Europe with 16.59% (1,492) of total visitation. Germany and France followed with 15.86% (1,426) and 9.58% (862) respectively.

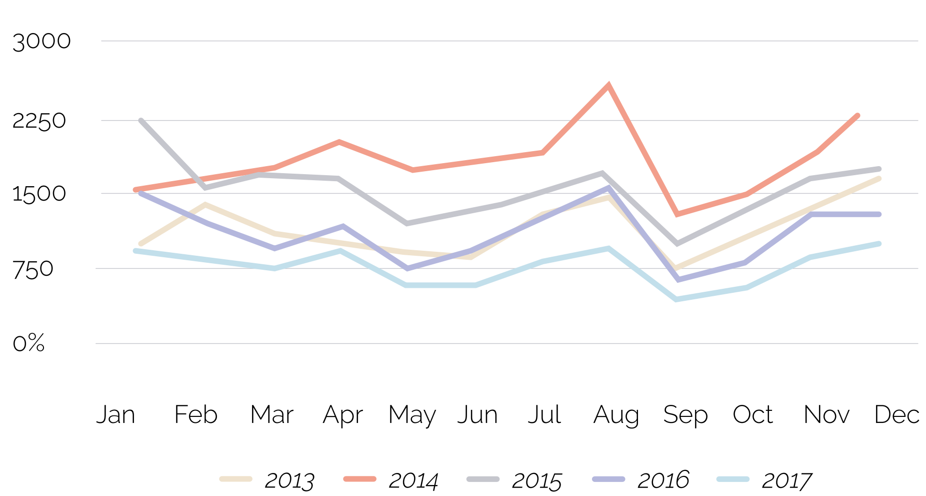
Source: Cayman Islands Immigration Department

Figure 50: Top 10 Continental Europe Countries for Visitor Arrivals to the Cayman Islands in 2017



Continental Europe did not show a clear pattern of seasonality in 2017. Visitation was at a five year low for each month in 2017. The destination was still in the process of recovering from the decline in visitors from Spain because of changes in US/Cuba relations which created more aviation connectivity between Cuba and other countries.

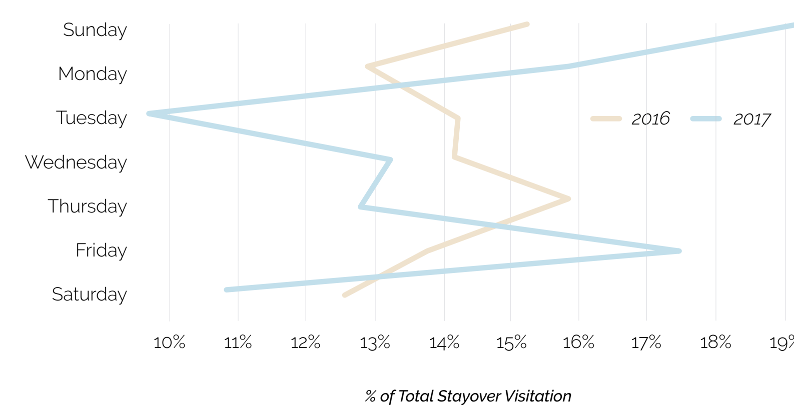
Figure 51: Seasonality of Continental Europe Visitor Arrivals



In 2017, visitation from the Continental Europe market peaked (in ranking order) in the weeks of 24 – 30 December, 17 – 23 December and 13– 19 August.

Traveller's main day of arrival from Continental Europe into the destination was Sunday. In 2017, 19.2% of visitors travelled to the Cayman Islands on a Sunday and their least most travelled day, Tuesday, was only 9.8%.

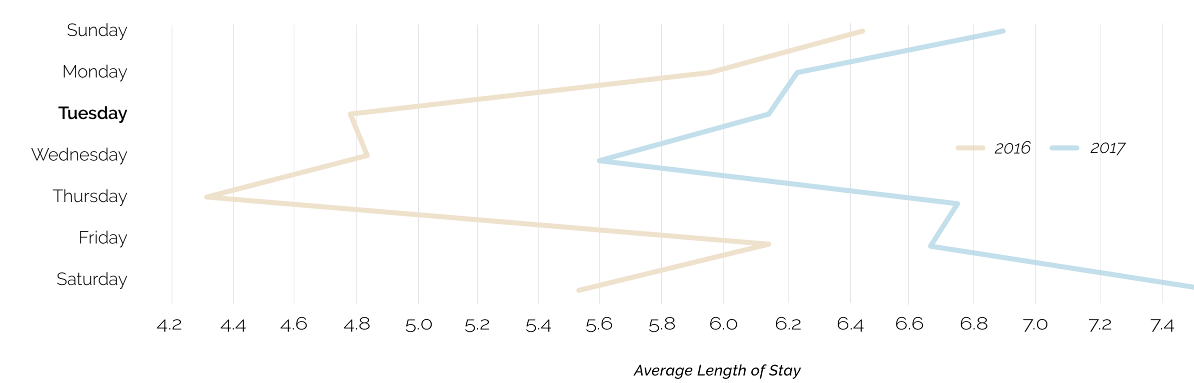
Figure 52: Continental Europe Visitor Arrivals by Day of Week



Stayover visitors who arrived on a Thursday as their primary travel day stayed in the destination the shortest at 4.3 nights. Visitors who came on Saturday stayed the longest at 7.6 nights.

Visitors arriving on each day stayed longer in 2017 compared to 2016.

Figure 53: Average Nights Stayed by Day of Arrival for Continental Europe Visitors



Source: Cayman Islands Immigration Department

The peak days of arrival for Continental Europe stayover visitors (ranking order) in 2017 were 13 August, 5 April and 24 December.

Figure 54: Day of Arrival for Stayover Visitors from Continental Europe

	SUN	MON	TUE	WED	THU	FRI	SAT
Italy	19.0%	16.5%	10.8%	13.5%	13.5%	16.1%	10.6%
Germany	20.5%	17.3%	9.1%	11.4%	11.8%	19.2%	10.7%
France	21.8%	10.2%	12.8%	15.1%	15.8%	14.5%	9.9%
Spain	20.0%	16.5%	7.8%	16.6%	10.8%	19.4%	9.0%
Switzerland	18.6%	16.4%	11.7%	12.8%	12.9%	17.4%	10.3%
Netherlands	19.3%	13.5%	9.9%	19.3%	8.9%	13.5%	15.6%
Sweden	22.2%	14.4%	7.3%	13.1%	11.6%	15.6%	15.8%
Austria	14.5%	14.8%	10.8%	12.0%	13.2%	21.8%	12.9%
Denmark	21.8%	18.2%	8.6%	9.6%	15.4%	15.7%	10.7%
Norway	13.5%	16.5%	8.6%	18.4%	12.4%	21.8%	8.6%

When looking on the day of arrival from the top ten (10) countries to the destination, the primary day of travel varied by country. The level of variability regarding the day of arrival was in line with the European visitor use of specific carries into the destination (mainly Cayman Airways and American Airlines).

Table 21: Continental Europe Arrivals by Selected Purpose of Visit[2]

		Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Wedding/ Honeymoon
ARRIVALS	2016	37%	6%	6%	4%	0%
	2017	48%	13%	8%	6%	1%
AVERAGE LENGTH OF STAY	2016	6.9	9.0	3.5	7.5	4.6
	2017	6.8	9.8	3.5	7.4	4.7
REPEAT VISIT	2016	34%	48%	44%	27%	23%
	2017	31%	50%	49%	25%	3%

The median age for the Continental European visitor to the destination was 42 years old. February recorded the highest median age in 2017 at 45 years old. Lower median ages were recorded in the summer months of July and August at 36 years old.

Table 22: Age Distribution of Continental Europe Visitors

Age Group	Number of Visitors 2016	Number of Visitors 2017	Percent Share 2016	Percent Share 2017
0-18	1,183	902	9.04%	10.03%
19-35	3,458	2,579	26.44%	28.67%
36-49	3,429	2,503	26.21%	27.83%
50-60	2,930	1,748	22.40%	19.44%
Over 60	2,081	1,262	15.91%	14.03%
Total	13,081	8,994	100.00%	100.00%

The largest age group for visitors from Continental Europe was 19-35 at 28.7%, followed by the 36-49 category which had a 27.8% share of visitation. The number of visitors over 50 years old declined by 39.93% and under 50 years old visitation decreased by 25.85%.

Figure 55: Age Distribution of Continental Europe Visitors

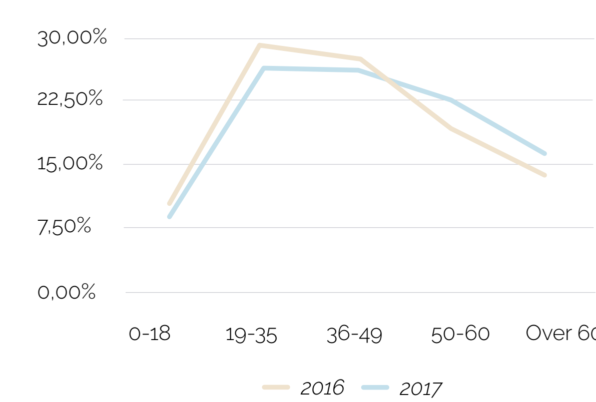
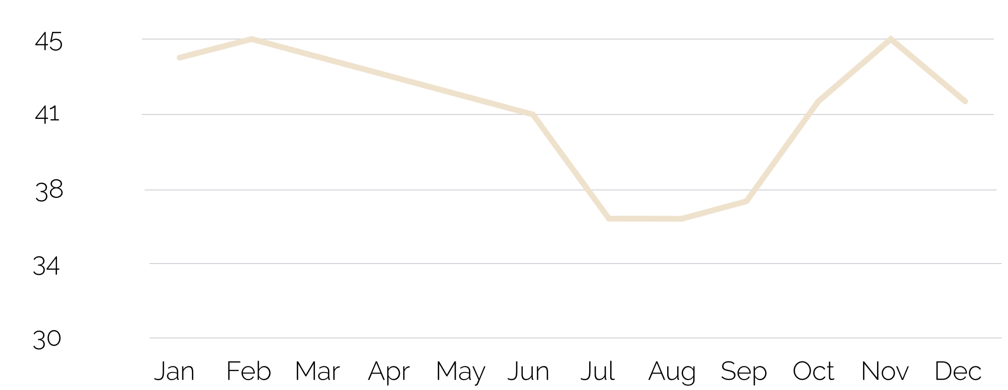


Figure 56: Median Age of Continental Europe Visitors in 2017



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LATIN AMERICA

(South and Central America)

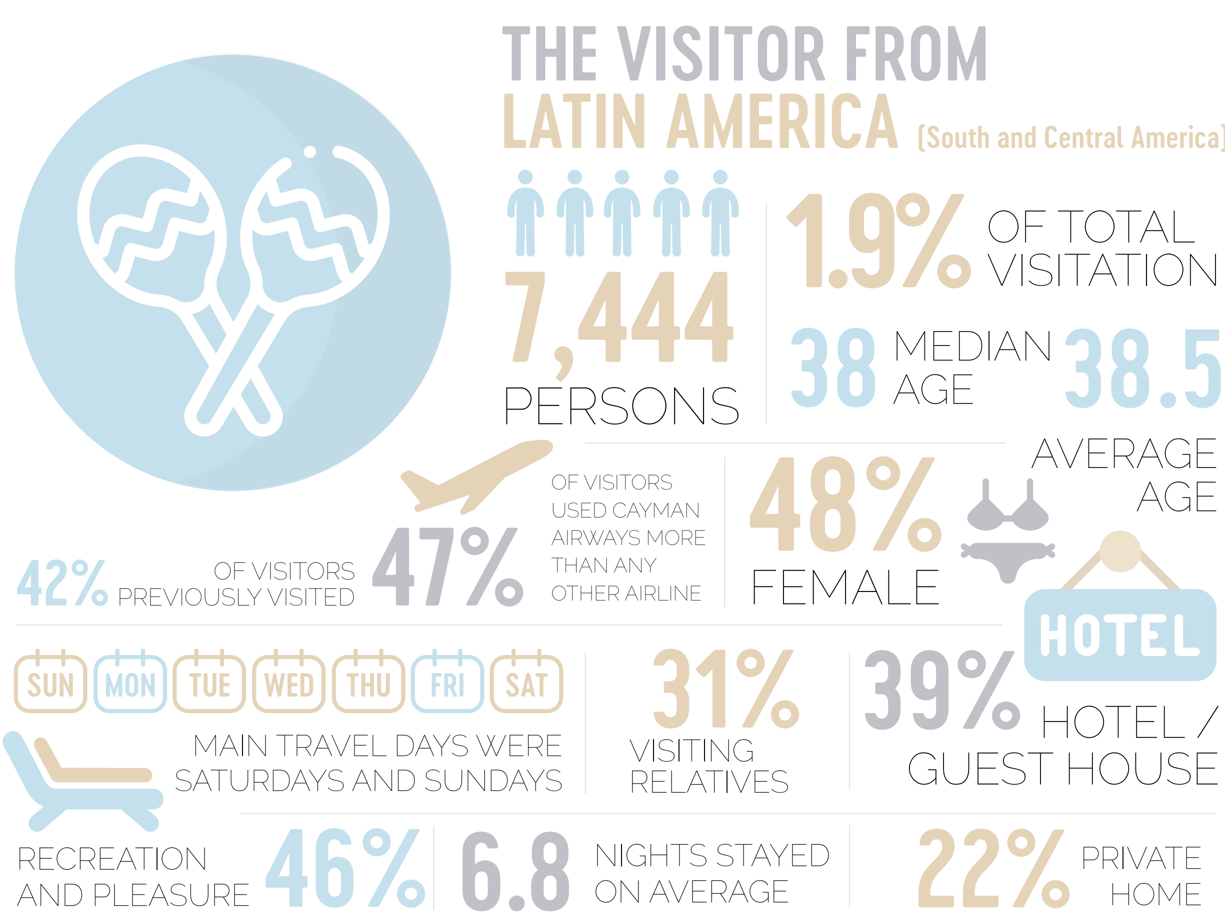
Overview

During 2017, the destination's Latin American representatives developed a strong marketing communication campaign in the primary markets identified from this region.

The Latin America (LATAM) promotions campaign driven in the region took place during a year of more stability compared to the last period, even though there were several economic fluctuations which occurred in the primary markets. These were slight changes compared to 2016.

Visitation from LATAM continued the path of double-digit growth recorded in 2016 with a growth rate of 22.6% in 2017.

Figure 57: 2017 Latin America Stayover Visitor Profile



Source: Cayman Islands Immigration Department

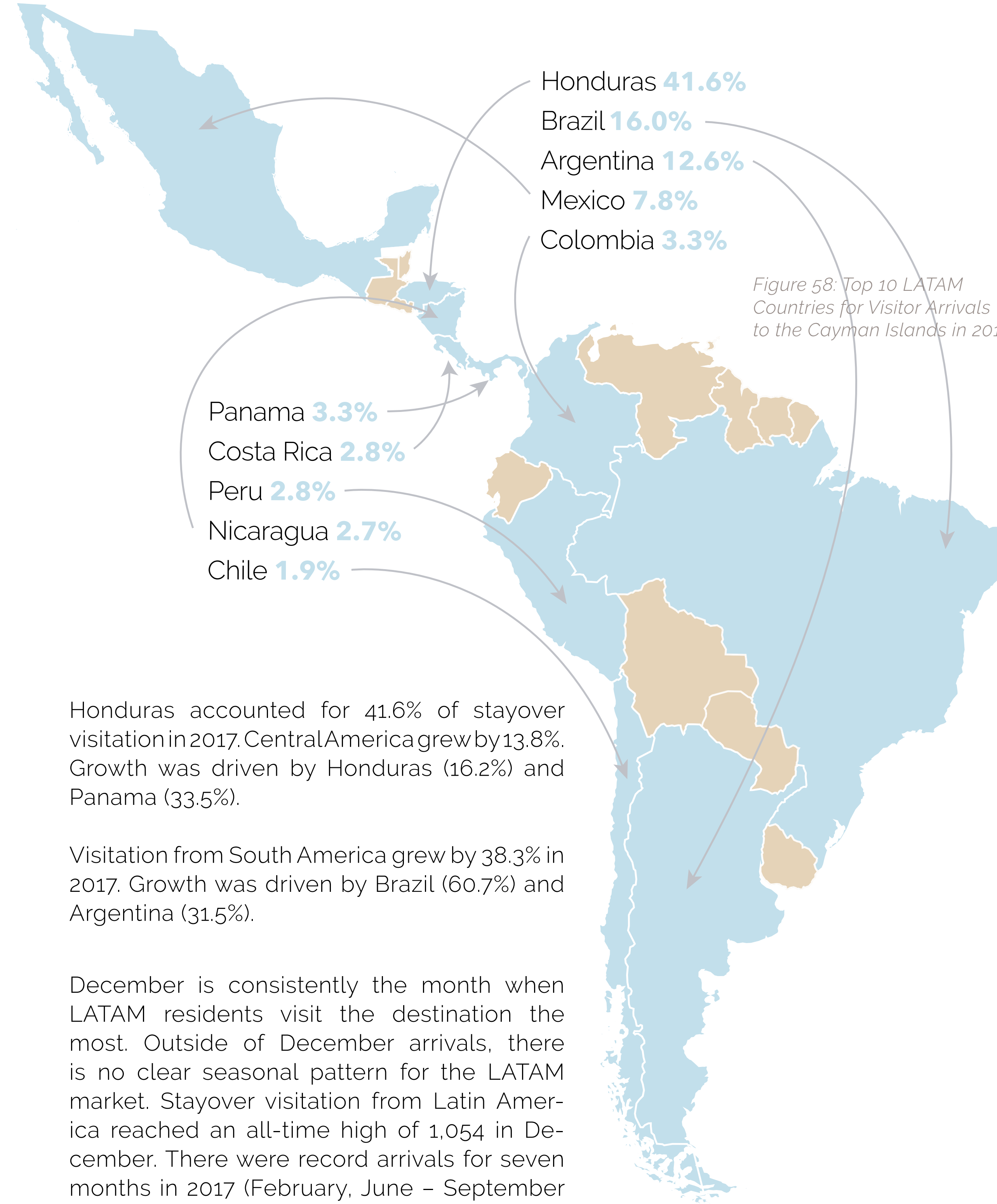


Figure 58: Top 10 LATAM Countries for Visitor Arrivals to the Cayman Islands in 2017

Honduras accounted for 41.6% of stayover visitation in 2017. Central America grew by 13.8%. Growth was driven by Honduras (16.2%) and Panama (33.5%).

Visitation from South America grew by 38.3% in 2017. Growth was driven by Brazil (60.7%) and Argentina (31.5%).

December is consistently the month when LATAM residents visit the destination the most. Outside of December arrivals, there is no clear seasonal pattern for the LATAM market. Stayover visitation from Latin America reached an all-time high of 1,054 in December. There were record arrivals for seven months in 2017 (February, June – September and November – December).

In 2017, visitation from the Latin America market peaked (in ranking order) in the weeks of 24 – 30 December, 17 – 23 December and 13– 19 August.

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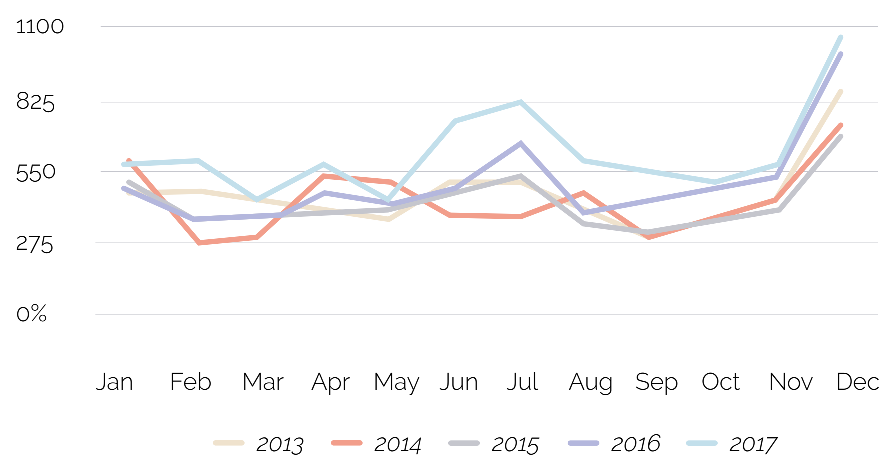
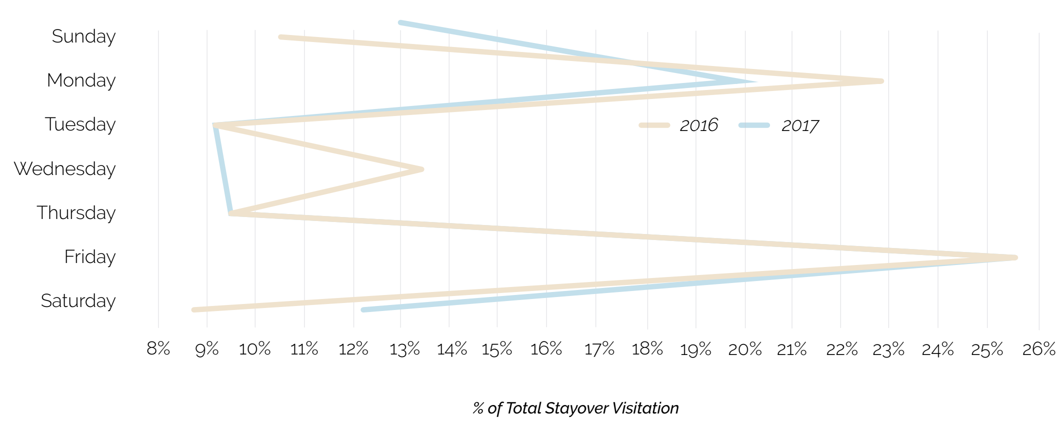
Figure 59: Top 10 LATAM Countries for Visitor Arrivals to the Cayman Islands in 2017



Friday and Monday are the primary days of arrival into the destination for LATAM travelers accounting for 48.5%. The primary days of travel coincided with Cayman Airways flight schedule to Honduras which accounted for a large percent of visitation.

Figure 60: LATAM Visitors Arrival by Day of Week



Visitors arriving on Friday and Saturday stayed the longest in the destination at 8.08 and 7.43 nights respectively. Thursday visitors stayed the shortest at 6.0 nights.

The peak days of arrival for Latin America stayover visitors (ranking order) in 2017 were 18 December, 15 December and 19 December.

Looking on the day of arrival for LATAM countries, as expected (due to Cayman Airways direct flight schedule), Honduras main days of arrival were Monday and Friday accounting for 62.3%. The primary day of entry for the second largest market, Brazil was Saturday with 18.1%. There was no clear pattern on the day of travel for LATAM.

Source: Cayman Islands Immigration Department

Figure 61: Day of Arrival for Stayover Visitors from Latin America

	SUN	MON	TUE	WED	THU	FRI	SAT
Honduras	10.2%	24.2%	4.8%	5.1%	6.8%	38.1%	10.9%
Brazil	16.0%	13.7%	10.9%	11.2%	15.3%	14.8%	18.1%
Argentina	17.0%	19.9%	12.5%	9.9%	10.2%	17.2%	13.3%
Mexico	16.5%	17.0%	8.8%	14.7%	19.2%	12.0%	11.8%
Colombia	10.2%	41.6%	5.3%	14.3%	12.7%	11.4%	4.5%
Panama	12.8%	18.5%	11.1%	14.0%	16.9%	11.9%	14.8%
Costa Rica	12.1%	13.5%	17.4%	15.5%	18.4%	15.5%	7.7%
Peru	15.9%	8.7%	13.0%	26.6%	13.0%	13.5%	9.2%
Nicaragua	2.0%	16.6%	41.2%	4.5%	3.0%	31.2%	1.5%
Chile	11.7%	14.5%	10.3%	10.3%	14.5%	17.2%	21.4%

LATAM traveller's primary purpose of visit in 2017 was Recreation / Pleasure at 32%. Visiting relatives followed closely at 21% but had the longest stay in the destination with 9.2 nights and highest repeat visitation at 62%.

Table 23: LATAM Arrivals by Selected Purpose of Visit[3]

		Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Wedding/ Honeymoon
ARRIVALS	2016	1,635 (27%)	1,263 (21%)	498 (8%)	498 (8%)	29 (0%)
	2017	2,360 (32%)	1,596 (21%)	511 (7%)	631 (8%)	41 (1%)
AVERAGE LENGTH OF STAY	2016	5.9	10.8	4.4	6.3	6.5
	2017	5.9	9.2	3.8	6.2	6.3
REPEAT VISIT	2016	37%	66%	44%	29%	12%
	2017	31%	62%	51%	25%	18%

[3]The length of stay is based on intended length of stay as identified on their Embarkation/Disembarkation card

Cayman Islands National Festival, Pirates Week

Table 24: Age Distribution of Latin American Visitors

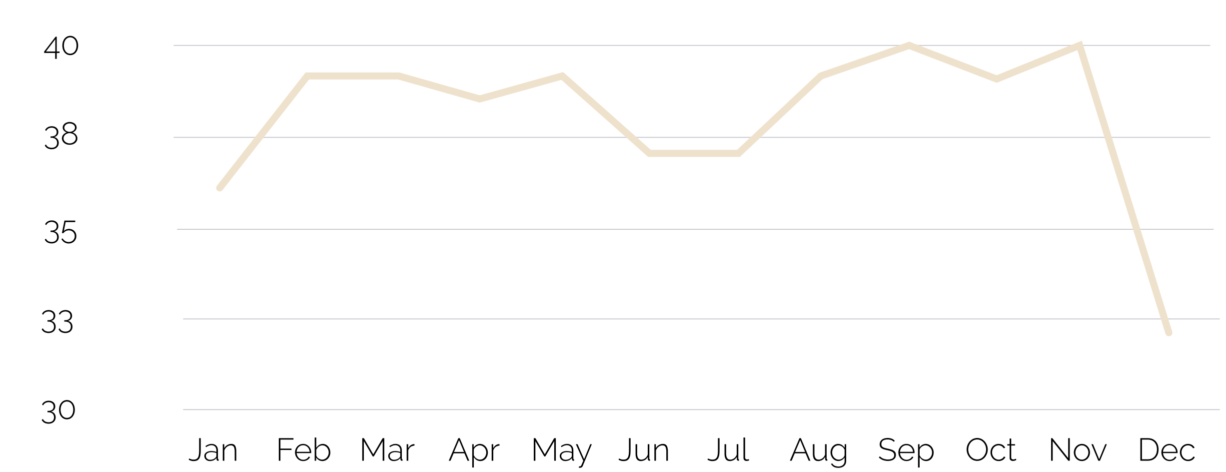
Age Group	Number of Visitors 2016	Number of Visitors 2017	Percent Share 2016	Percent Share 2017
0-18	896	1,185	14.76%	15.92%
19-35	1,873	2,149	30.85%	28.87%
36-49	1,677	2,040	27.62%	27.40%
50-60	895	1,074	14.74%	14.43%
Over 60	730	996	12.02%	13.38%
Total	6,071	7,444	100.00%	100.00%

The age group of 19-35 was the largest at 28.9% for the LATAM market. This was despite the group having the lowest growth rate of 14.7%. All age groups recorded growth, but the largest increase was the Over 60 age group which saw a growth of 36.4%.

Figure 62: Age Distribution of Latin America Visitors

The median age for the Latin American visitor to the destination was 38 years old. The median age ranged between 37 to 40 years for all months except for January and December. Lower median ages were recorded in January and December at 36 and 32 years old respectively.

Figure 63: Median Age of Latin American Visitors in 2017



Source: Cayman Islands Immigration Department

WHO ARE OUR STAYOVER VISITORS?

VISITCAYMANISLANDS.COM / 2017

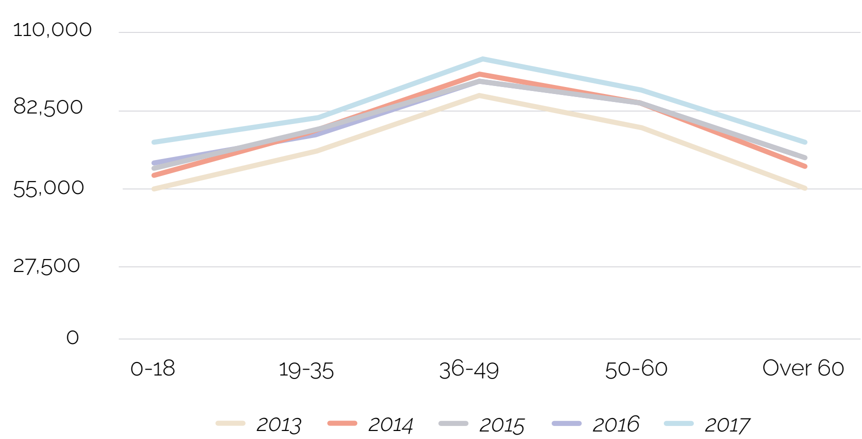
CAYMAN ISLANDS

Understanding who visits the Cayman Islands is one of the most critical steps in increasing visitation and optimising the visitors' experience. This section aims to provide a wider understanding of the demographic profile of visitors, why they travel to the Cayman Islands and their travel pattern.

Policy makers and partners are encouraged to not just focus on overall performance, without taking the time to understand the characteristics of persons visiting the destination.

Demographic Profile

Figure 64: Age of Stayover Visitors by Year



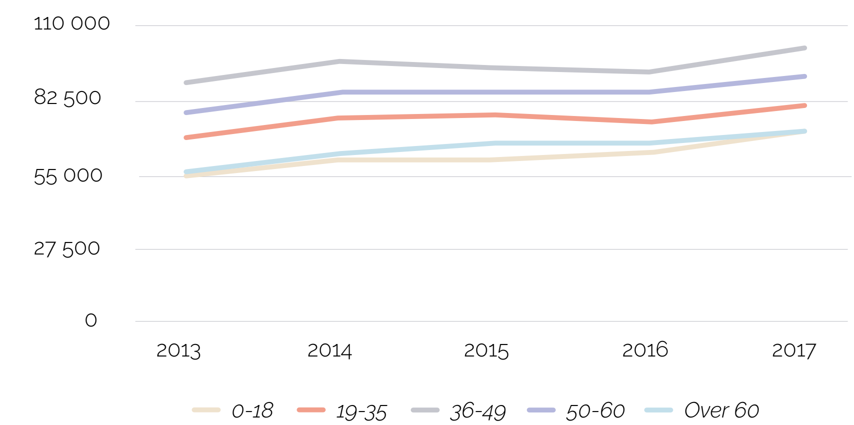
Age. The age group 36-49 accounted for 24.7% of stayover visitors in 2017, which was a small increase over 2016. This age group was followed closely behind by the 50-60 age category at 21.9% and 19-35 age group at 19.4%.

Table 25: Age of Stayover Visitors by Year

	Stayover Visitor Arrivals					Percent Share	
	2013	2014	2015	2016	2017	2016	2017
0-18	54,056	59,812	60,975	63,257	71,144	16.41%	17.00%
19-35	68,409	76,042	77,276	74,812	81,065	19.41%	19.37%
36-49	90,168	97,869	95,173	94,087	103,227	24.41%	24.67%
50-60	78,021	86,421	86,289	86,977	91,704	22.56%	21.92%
Over 60	54,726	62,672	65,665	66,318	71,263	17.21%	17.03%
TOTAL	345,380	382,816	385,378	385,451	418,403	100.00%	100.00%

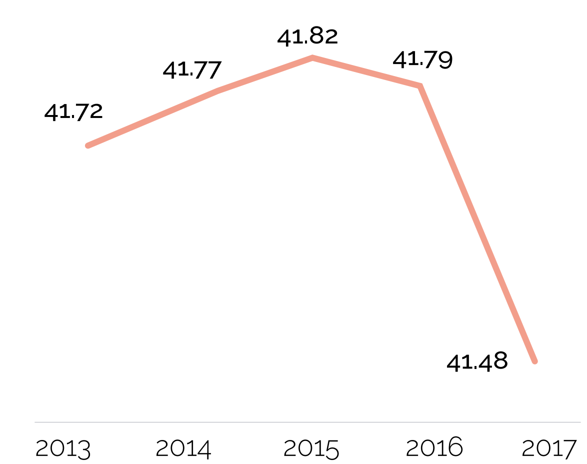
All age groups saw growth in arrivals in 2017. The 0-18 age group had the highest growth rate, increasing by 12.5%, which was the second consecutive year that this age group had the highest growth rate. The growth in the 0-18 age category over the last two years showed an increase in the share of total stayover arrivals from 15.8% in 2015 to 17.0% in 2017, which was a 1.2% percentage point increase.

Figure 65: Stayover Visitors Growth Trend by Age Groups



The average age of stayover visitors in 2017 was 41.5 years old. The average age of visitors has shown a decline for the second consecutive year. This is in line with the 0-18 group growing at a faster annual rate when compared to the other age groups.

Figure 66: Average Age of Stayover Visitors



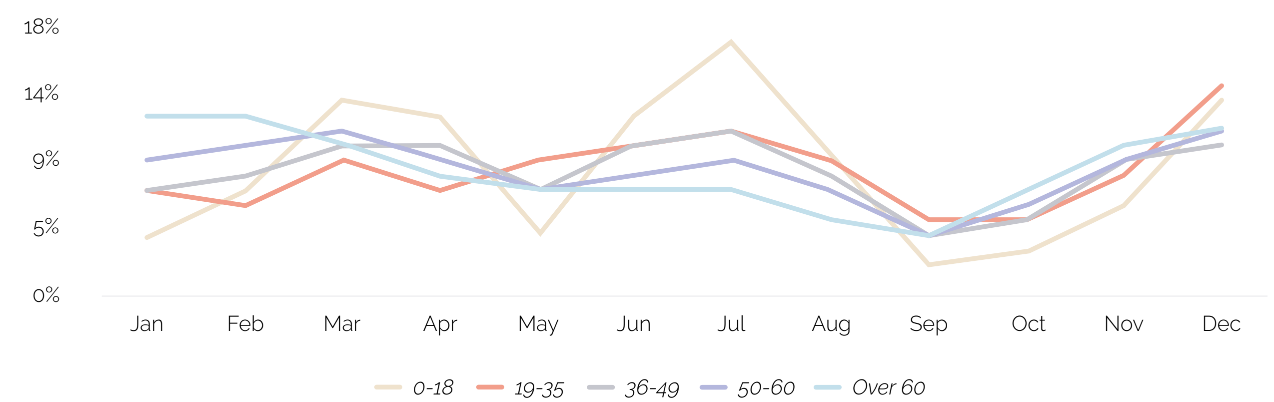
Source: Cayman Islands Immigration Department

The median age for stayover visitors to the Cayman Islands in 2017 was 44 years old. This median means that half the stayover visitors were younger than 44 years old and half were older than 44 years old. The median age has been consistent at 44 years old over the last five years except in 2016 when it was 45 years old.

Different age groups showed a varying level of seasonality in 2017 as shown below:

- The 0-18 age group demonstrated the highest level of seasonality with peaks in March, July and December;
- 36-49 age group was the most consistent group with July having the highest share;
- The 19- 35 age group peaked in Jun, July and December;
- The 50-60 and Over 60 groups had higher percentages around the winter season (January - February) as well as October-November.

Figure 67: Seasonality of Stayover Visitors by Age, 2017



Consistent with the seasonality in arrivals by the age of stayover visitors above, the 0-18 group accounted for 27% of arrivals in July but also represented well at 21% for the months of March, April, June and August. The 36-49 age group which accounts for the highest percent of arrivals, accounted for 24%-27% of each month arrivals between February and November.

Table 26: Age Distribution of Stayover Arrivals by Month, 2017

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
0-18	8%	13%	21%	21%	10%	21%	27%	21%	7%	8%	12%	19%	17%
19-35	19%	13%	17%	15%	25%	21%	20%	23%	23%	20%	18%	23%	19%
36-49	22%	24%	24%	27%	26%	26%	25%	25%	27%	25%	26%	21%	25%
50-60	25%	25%	22%	22%	23%	20%	18%	19%	24%	25%	24%	20%	22%
Over 60	26%	24%	16%	15%	17%	13%	11%	12%	19%	21%	20%	16%	17%
TOTAL	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %

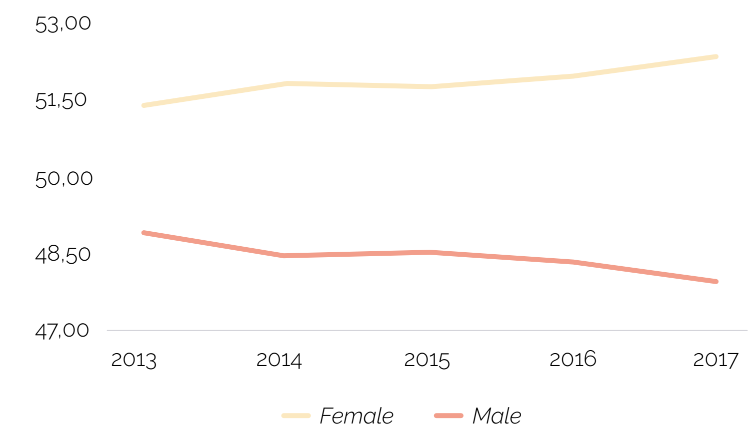
The Over 60 group recorded the highest percentage of repeat visitors with 61.1%. The 19-35 group was the lowest with 36.7%.

Table 27: Age of Visitors vs Repeat Visits

	First Visit	Repeat Visit
0-18	62.9%	37.1%
19-35	63.4%	36.7%
36-49	53.4%	46.6%
50-60	44.3%	55.7%
Over 60	34.9%	65.1%

Gender. The gender gap between male and female visitors increased for the third consecutive year in 2017. Females accounted for 52.2% of stayover visitors.

Figure 68: Gender of Stayover Visitors



Caribbean Club

Table 28: Gender of Stayover Visitors

	Number of Stayover Visitors					Percent Share				
	2013	2014	2015	2016	2017					
Female	177,269	197,945	199,153	199,793	218,210	51.33	51.71	51.68	51.83	52.15
Male	168,111	184,871	186,225	185,658	200,193	48.67	48.29	48.17	48.17	47.85
TOTAL	345,380	382,816	385,378	385,451	418,403					

Table 29: Occupation of Stayover Visitors

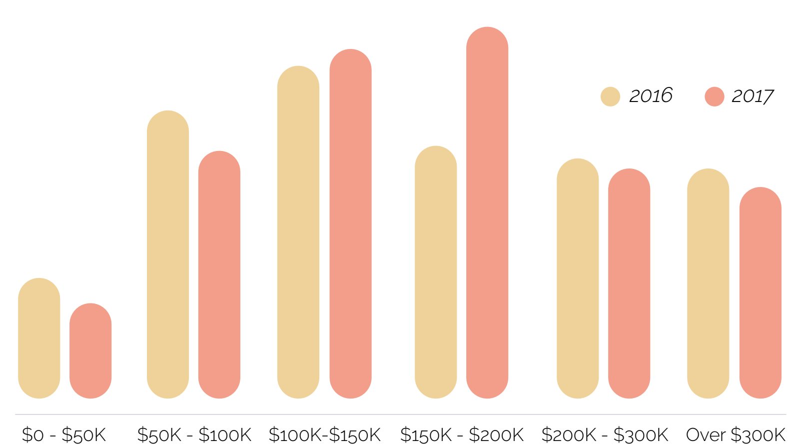
	Stayover Visitor Arrivals					Percent Share	
	2013	2014	2015	2016	2017	2016	2017
Professional	123,523	136,036	138,091	149,122	178,537	38.69%	42.67%
Student	52,691	56,584	58,138	65,360	78,028	16.96%	18.65%
Managerial	40,943	42,986	42,408	46,471	52,178	12.06%	12.47%
Retired	35,400	38,296	39,093	44,405	51,387	11.52%	12.28%
Other	72,350	89,337	88,845	58,761	32,856	15.24%	7.85%
Service/ Trade	20,473	19,577	18,803	21,332	25,417	5.53%	6.07%
TOTAL	345,380	382,816	385,378	385,451	418,403	100.00%	100.00%

Occupation[1]. Stayover visitors who identified themselves as being professionals represented 42.7% of total visitation in 2017.

The professional group saw a growth of 19.7% when compared to 2016.

Household Income[2]. Based on Stayover Visitor Exit Survey results in 2017, 26.5% of visitors surveyed reported having an annual household income between US$150,000 and US$200,000. This income level represented 18.2% of survey respondents in the 2016 Stayover Visitor Exit Survey. In 2017, 24.8% of respondents reported annual household income between US$100,000 – US$150,000.

Figure 69: Annual Household Income



[1] Cayman Islands Immigration Department
[2] CIDOT Visitor Exit Survey 2017

Trip Details

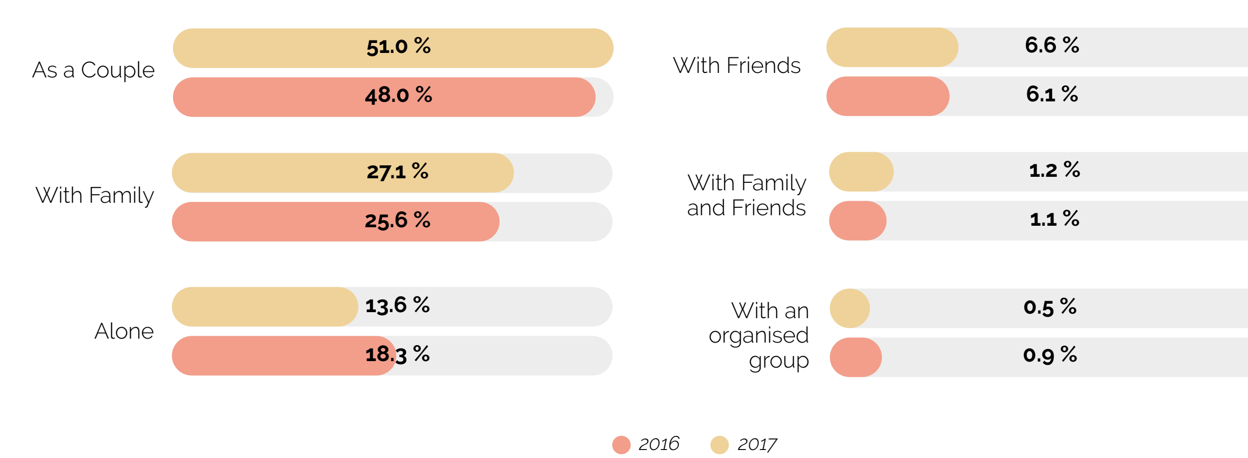
Purpose of Visit[1]. The main purpose of visit for stayover visitors in 2017 was Recreation/Pleasure which accounted for 76.8% of total visitation; this was followed by Visiting Relatives, Business and Dive Vacation respectively.

Table 30: Purpose of Visit (2013-2017)

	Number of Stayover Visitors					Percent Share	
	2013	2014	2015	2016	2017	2016	2017
Recreation/Pleasure	242,710	264,600	269,509	282,133	321,337	73.20%	76.80%
Visiting Relatives	21,281	19,653	20,260	21,513	25,212	5.58%	6.03%
Business	19,858	19,082	18,680	21,079	23,634	5.47%	5.65%
Dive Vacation	15,942	14,580	13,686	15,456	18,112	4.01%	4.33%
Wedding/Honeymoon	4,275	3,643	3,524	3,491	4,356	0.91%	1.04%
Other/Unknown	41,314	61,258	59,719	41,779	25,752	10.84%	6.15%
TOTAL	345,380	382,816	385,378	385,451	418,403	100.00%	100.00%

Travel Companion[2]. 51.0% of stayover visitors surveyed reported that they travelled as a couple. Travelling as a couple was followed by family travel with 27.1%.

Figure 70: Visitors Travel Companions (2016-2017)

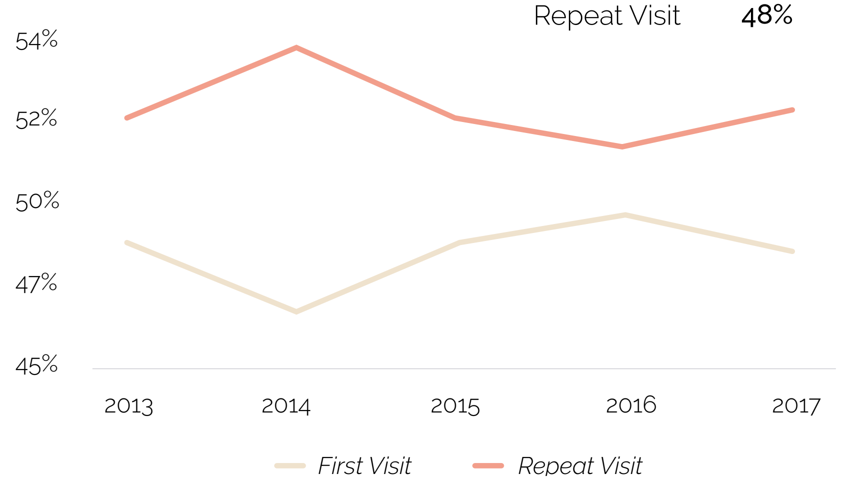


Repeat Visitation[1]. In 2017, 48.0% of visitors indicated that they had previously visited the Cayman Islands. Over the last five years repeat visitation has ranged between 47% - 49% each year.

Table 31: Repeat Visitation

	2013	2014	2015	2016	2017
First Visit	52%	53%	52%	51%	52%
Repeat Visit	48%	47%	48%	49%	48%

Figure 71: Repeat Visitation



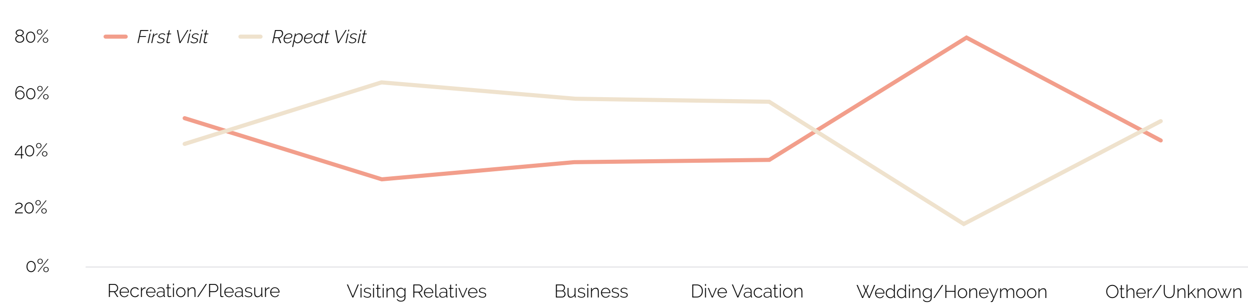
Stayover visitors who stated that their main purpose of visit was Recreation/Pleasure or Wedding/Honeymoon had a higher percentage of first-time visitors compared to repeat visitation. Wedding/Honeymoon showed 79% of visitors reporting first time visit and Recreation/Pleasure had 54% of visitors visiting for the first time.

Visiting Relatives showed the highest percent of visitors reporting repeat visits, 65% reported they visited the destination previously.

Table 32: Repeat Visit by Purpose of Visit

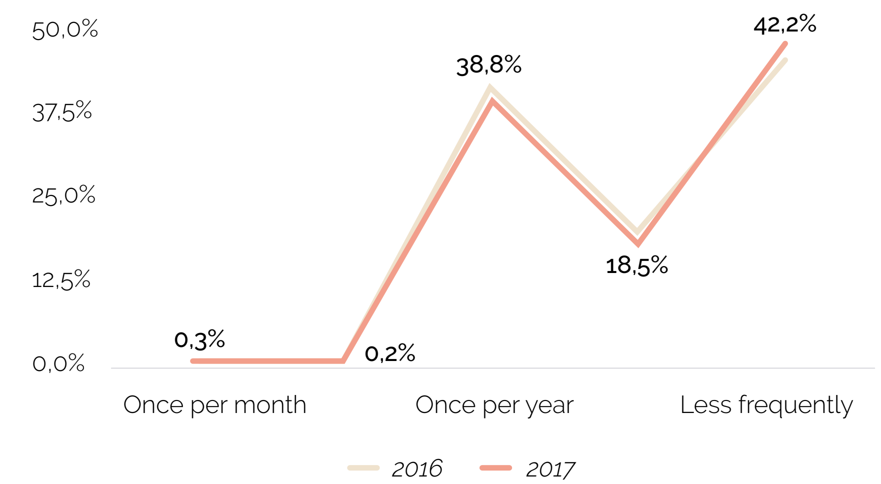
	Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Wedding/ Honeymoon	Other/ Unknown
First Visit	54%	35%	40%	41%	79%	47%
Repeat Visit	46%	65%	60%	59%	21%	53%

Figure 72: Repeat Visit by Purpose of Visit



Source: Cayman Islands Immigration Department

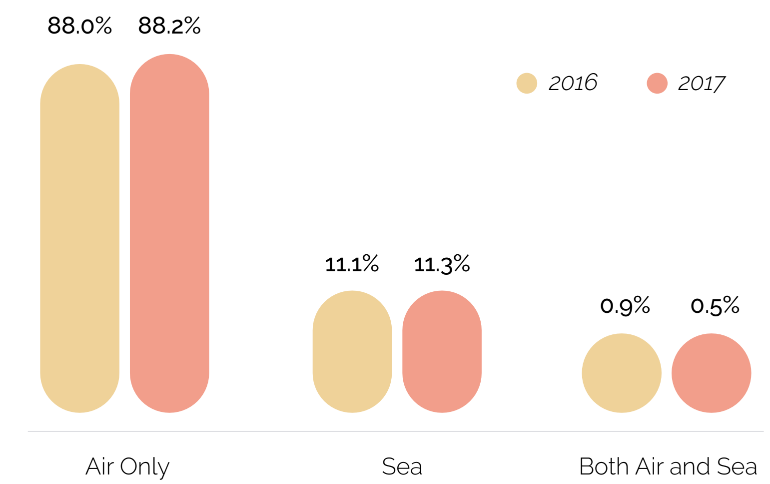
Figure 73: Frequency of Repeat Visits (2016-2017)



In the 2017 Stayover Visitor Exit Survey, respondents who had previously visited the destination were asked about their frequency of visits. 38.8% stated that they visit at least once per year; however, the highest rate of repeat visits was less than once per year at 42.2%.

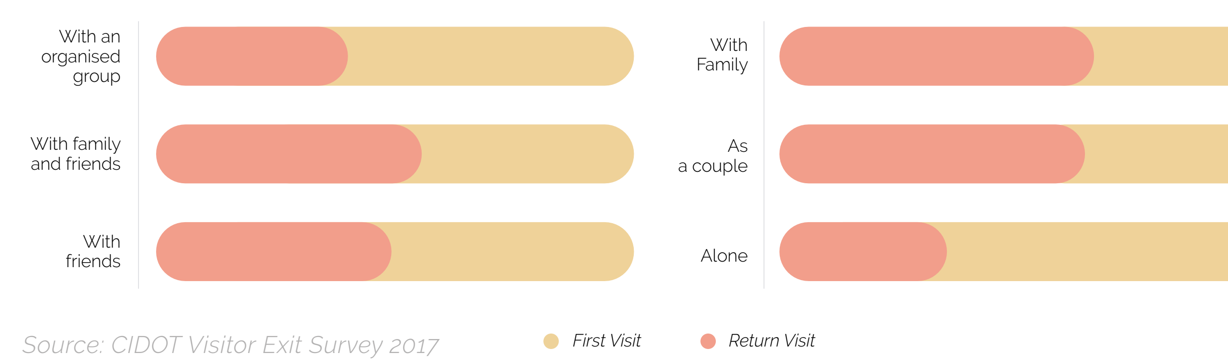
Figure 74: Mode of Transport for Repeat Visits

88.2% of respondents who reported that they were a repeat visitor in 2017 previously visited the destination by air, while 11.3% visited on a cruise.



Repeat Visitation and Travel Companion. 75.2% of survey respondents who travelled alone stated that they previously visited the destination. 41.6% of couples said that they previously visited the destination.

Figure 75: Repeat Visitation and Travel Companion



Source: CIDOT Visitor Exit Survey 2017

Average Length of Stay. The average length of stay in 2017 was 6.2 nights; this was the same as 2016. Visitors who stated that the main purpose of visit was Visiting Relatives stayed in the destination the longest at 8.1 nights followed by Dive Vacation at 6.9 nights. Business travellers had the shortest average length of stay at 3.6 nights.

Over the last five years, repeat visitors stayed longer in the destination than first-time visitors. In 2017, repeat visitors stayed on average 6.6 nights while first-time visitors stayed on average 5.8 nights.

Visitors from the largest source market USA stayed 5.9 nights. Europeans and Canadians stayed the longest at 7.9 nights and 7.5 nights respectively.

Visitors staying in private homes stayed 7.6 nights based on accommodation type. The most commonly used accommodation type was Hotel/Guest House, and visitors staying in this type of accommodation stayed 5.6 nights.

Table 33: Average Length of Stay by Category of Visitor

	2013	2014	2015	2016	2017
OVERALL	6.1	6.1	6.3	6.2	6.2
PURPOSE OF VISIT					
Recreation/Pleasure	6.3	6.3	6.5	6.3	6.2
Visiting Relatives	8.1	7.9	8.5	8.3	8.1
Business	3.3	3.4	3.6	3.6	3.6
Dive Vacation	7.0	7.0	7.0	7.0	6.9
Wedding/Honeymoon	5.7	5.8	5.7	5.8	5.6
Other/Unknown	5.3	5.2	4.9	5.2	5.7
PREVIOUS VISIT					
First Visit	5.9	5.9	6.0	5.9	5.8
Repeat Visit	6.6	6.6	6.9	6.6	6.6
REGION					
USA	6.0	6.0	6.1	6.0	5.9
Canada	7.5	7.5	7.8	7.5	7.5
Europe	6.9	6.7	6.9	7.2	7.9
Latin America	5.9	6.0	6.3	7.1	6.8
Rest of the World	6.4	5.3	6.4	6.5	6.6
ACCOMMODATION TYPE					
Apartment / Condo	6.7	6.7	7.0	6.7	6.8
Hotel / Guest House	5.5	5.5	5.6	5.5	5.6
Private Home	7.8	7.5	8.0	7.7	7.6
Timeshare	6.8	6.7	6.7	6.7	6.9
Unknown	5.6	5.6	5.2	5.5	5.3

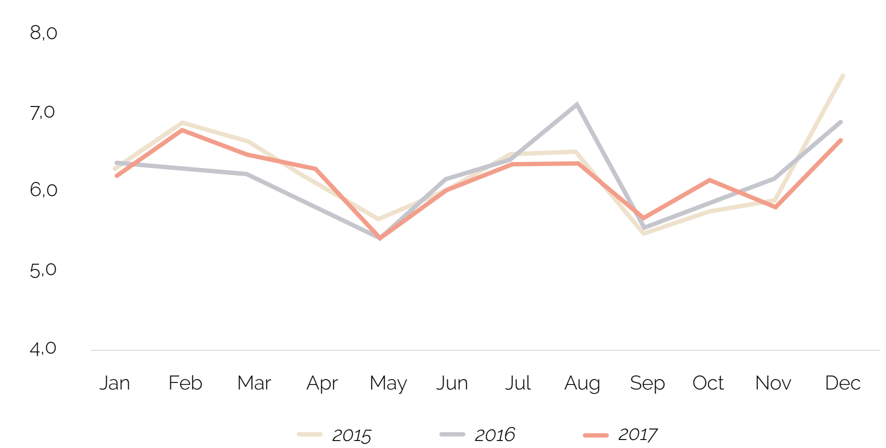
[1] Length of Stay (LOS) is based on the intended LOS noted on the Embarkation/ Debarkation Card (ED Card).

Persons visiting In February and December stayed the longest in 2017 at an average of 6.5 nights. Looking on the last five years, in December 2015 visitors stayed the longest at 7.1 nights. Visitors in May and September consistently stayed the shortest over the previous five years.

Figure 76: Average Length of Stay by Month (2013-2017)

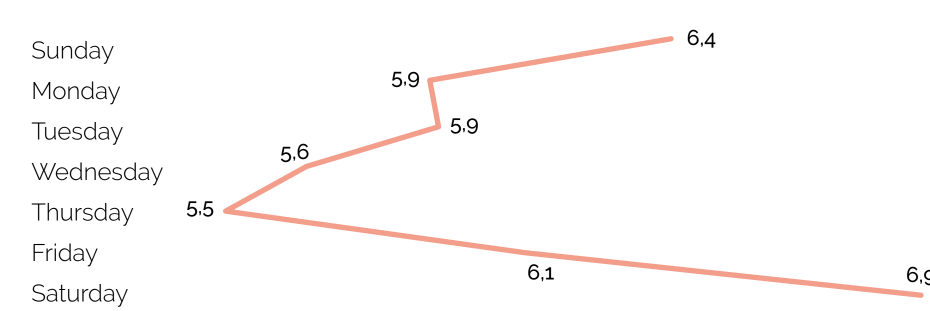
	2013	2014	2015	2016	2017
Jan	6.1	6.4	6.2	6.2	6.1
Feb	6.2	6.4	6.6	6.2	6.5
Mar	6.3	6.2	6.4	6.1	6.3
Apr	5.8	6.1	6.1	5.9	6.2
May	5.7	5.6	5.7	5.6	5.6
Jun	6.1	5.9	6.0	6.1	6.0
Jul	6.3	6.1	6.3	6.3	6.2
Aug	6.9	6.4	6.3	6.8	6.2
Sep	5.7	5.3	5.6	5.7	5.7
Oct	5.7	5.8	5.8	5.9	6.1
Nov	6.0	5.9	5.9	6.1	5.8
Dec	6.3	6.3	7.1	6.6	6.5

Figure 77: Average Length of Stay by Month (2015-2017)



Like 2016, visitors arriving on Saturdays stayed the longest in the destination with an average length of stay of 6.9 nights; as with the day of travel, Sunday visitors stayed the second longest at 6.4 nights. Persons arriving on Thursday stayed the shortest at 5.5 nights.

Figure 78: Average Length of Stay by Day of Arrival

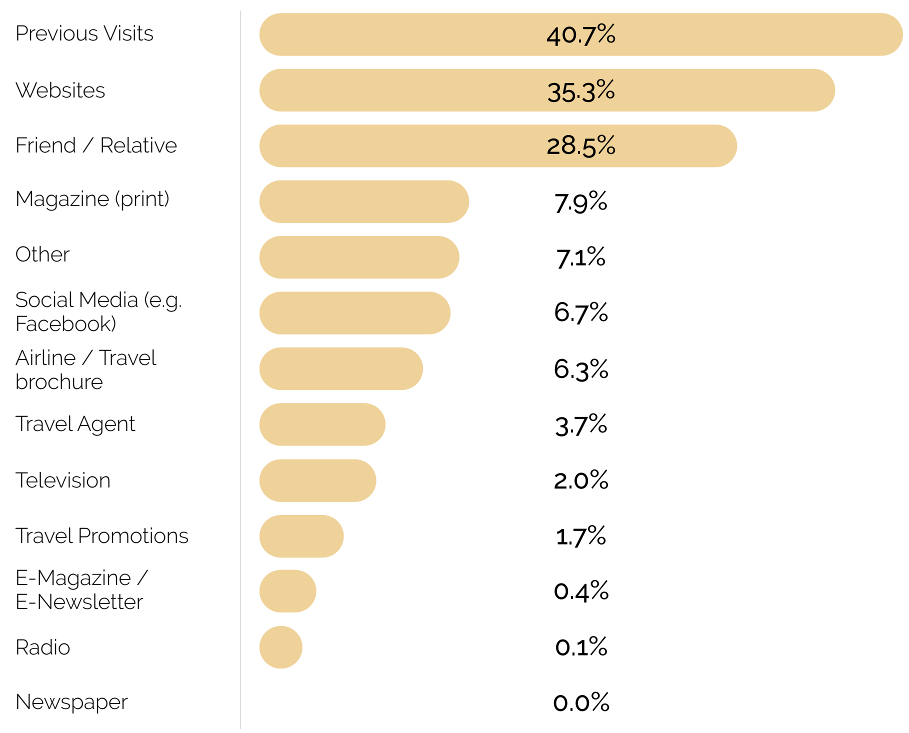


Source: Cayman Islands Immigration Department

Travel Planning. Destination marketers are always interested in what aided a visitor in their final decision to visit. These responses guide marketing decisions and messages.

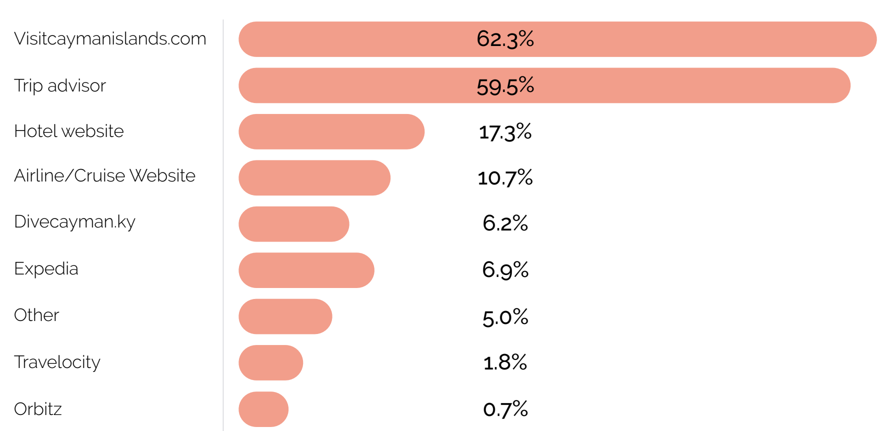
In 2017, 40.7% of visitors said previous visits helped in their decision to visit the Cayman Islands. Websites and Friend/Relative were next with 35.3% and 28.5% respectively.

Figure 79: Visitors Decision Making in 2017



Stayover visitors who said Websites assisted in their decision to visit were asked which websites. Visitcaymanislands.com was the most popular website with 62.3% of survey respondents reporting that the site helped in their decision to visit the destination. TripAdvisor was second with 59.5% of respondents stating that they were influenced by this option.

Figure 80: Websites Used by Visitors in Planning Their Trip



CIDOT Sister Islands Visitor Exit Survey

SISTER ISLANDS

The data in this section shows visitation to the Sister Islands (Cayman Brac and Little Cayman) as reported on the Embarkation/ Disembarkation (E/D) card provided by the Cayman Islands Department of Immigration. It should be highlighted that visitors may note that Grand Cayman is their main stay, but may visit the sister islands as well. The E/D card only collects the main island that they would be staying on and not visits to any other island. Therefore, we do not have knowledge of the exact number of visitors to the Sister Islands.

Data was also captured from the CIDOT Visitor Exit Survey 2017 that was completed by visitors in the Sister Islands.

10,261 visitors stated on their E/D card that they were visiting the Sister Islands in 2017. This was 5.7% increase over 2016.

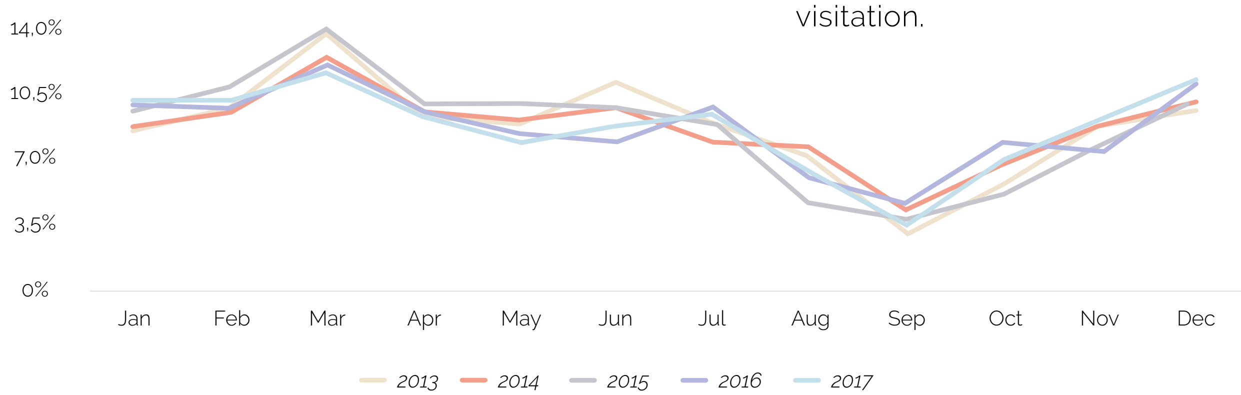
The United States accounted for an estimated 88.8% of visitors to the Sister Islands. Canada and Europe followed with 6.5% and 2.3% respectively.

Table 34: Region of Residence for Sister Islands Visitors

	2013	2014	2015	2016	2017
USA	89.7%	89.3%	89.6%	89.8%	88.8%
Canada	6.0%	6.0%	6.2%	5.8%	6.5%
Europe	2.8%	3.3%	2.9%	2.6%	2.3%
Rest of the World	1.0%	1.0%	0.9%	1.3%	1.8%
Latin America	0.4%	0.5%	0.4%	0.6%	0.7%

In 2017, March accounted for an estimated 11.4% of visitation to the Sister Islands. March was followed by December (10.9%) and February (9.9%) respectively. September accounted for 2.9% of visitation.

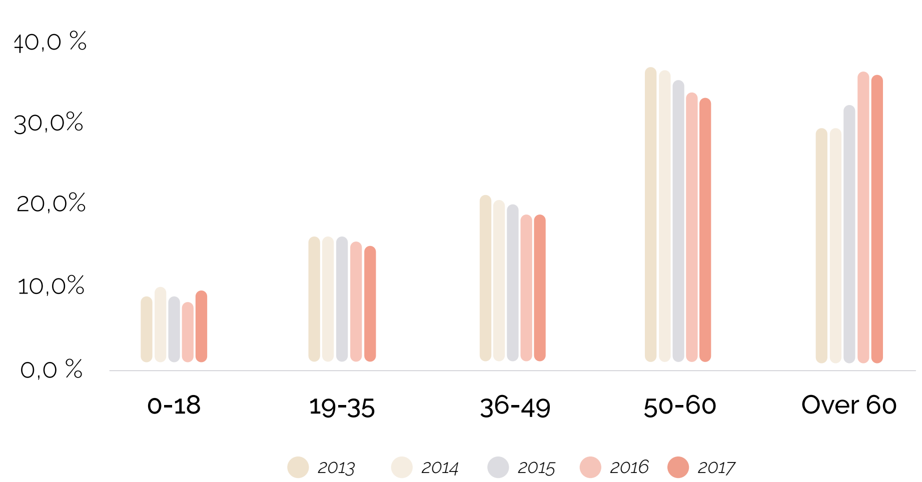
Figure 81: Distribution of Sister Islands Visitors by Month



Demographic Profile

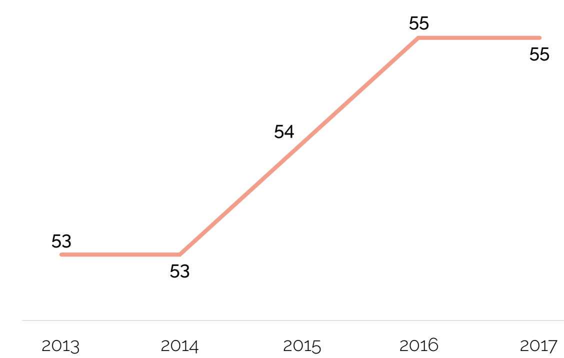
Age. Over the last two years, the Over 60 age group accounted for the highest percent share of visitors to the Sister Islands. One in every three visitors to the Sister Islands were over 60 years old. Between 2013 and 2015 the 50-60 age group accounted for the highest share of visitation. In 2017, 63% of visitors were over 50 years old.

Figure 82: Age of Sister Islands Visitors



The median age of visitors to the Sister Islands has been growing gradually over the last five years. In 2017, the median age was 55 years compared to 53 years in 2013.

Figure 83: Median Age of Sister Islands Visitors



Gender. The Sister Islands received more female visitors than male in 2017, 53.7% of visitors were female, the Sister Islands received more female visitors than male. In 2017, 53.7% of visitors were female.

Figure 84: Gender of Sister Islands Visitors

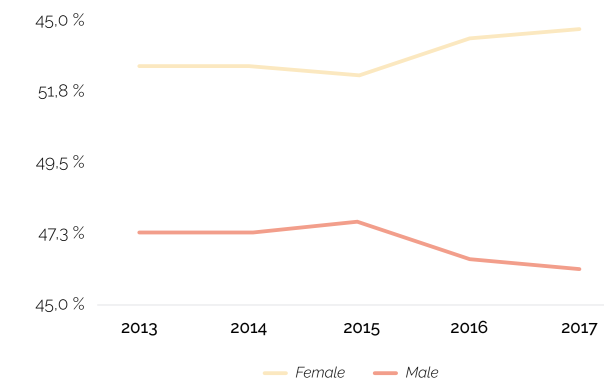


Table 35: Gender of Sister Islands Visitors

	Percent Share				
	2013	2014	2015	2016	2017
Female	52.5%	52.5%	52.2%	53.3%	53.7%
Male	47.5%	47.5%	47.8%	46.7%	46.3%

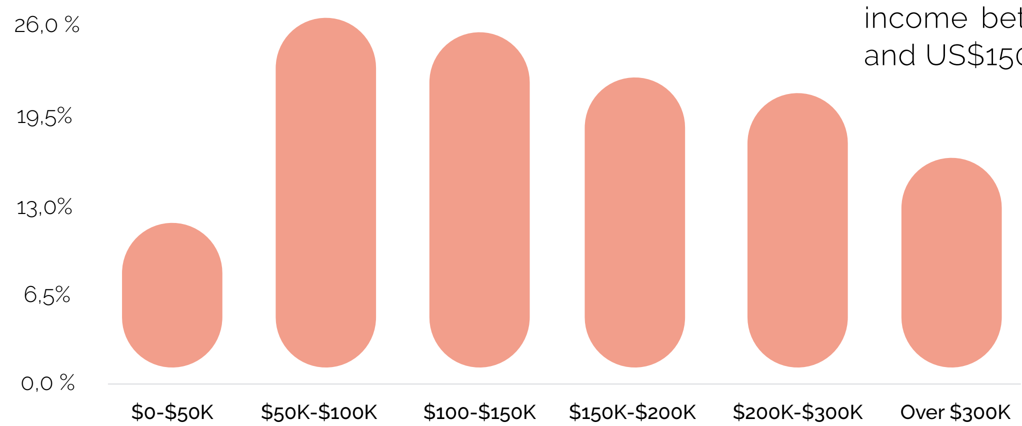
Occupation. Stayover visitors who are professionals represented 44.7% of total visitation to the Sister Islands in 2017. The retired group was second with 23.0%.

Figure 85: Occupation of Sister Islands Visitors

	2013	2014	2015	2016	2017
Managerial	11.7%	11.5%	11.7%	11.8%	11.0%
Professional	42.3%	44.4%	43.3%	43.3%	44.7%
Retired	19.3%	18.6%	20.0%	23.2%	23.0%
Service/Trade	7.1%	5.9%	6.1%	5.9%	7.0%
Student	10.2%	10.5%	10.3%	9.8%	11.5%
Other	9.4%	9.1%	8.6%	6.0%	2.8%

Source: Cayman Islands Immigration Department

Figure 86: Average Household Income of Sister Islands Visitors (US$)



Household Income[2]. 48% of survey respondents reported having an annual household income between US$50,000 and US$150,000.

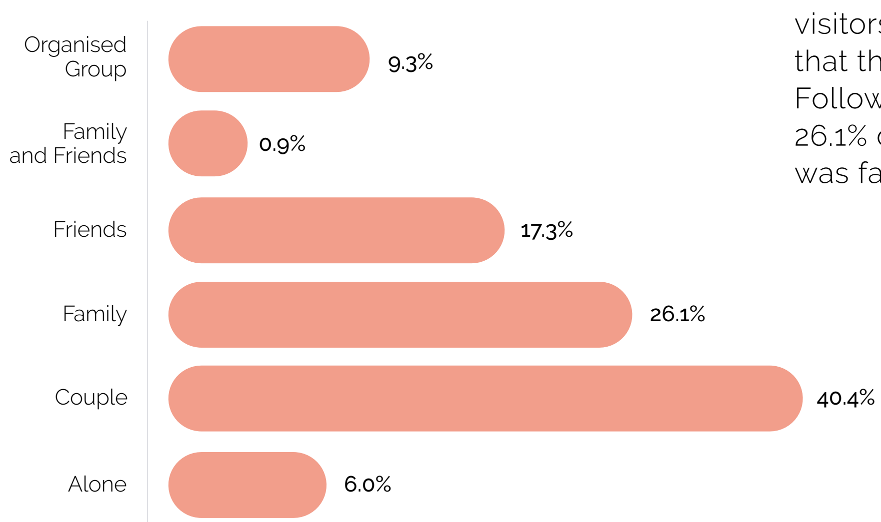
Trip Details

Purpose of Visit[1]. The main purpose of visit for stayover visitors in 2017 was Recreation/Pleasure which accounted for 39.8% of total visitation; this was followed by Dive Vacation which accounted for 39.8%.

Table 36: Sister Islands Purpose of Visit (2013-2017)

	2013	2014	2015	2016	2017
Recreation/Pleasure	52.7%	58.1%	57.6%	53.8%	54.0%
Dive Vacation	41.2%	35.8%	36.2%	39.3%	39.8%
Visiting Relatives	3.4%	2.9%	3.2%	3.9%	3.4%
Business	0.9%	0.9%	1.2%	1.5%	1.4%
Latin America	1.8%	2.3%	1.8%	1.5%	1.4%

Figure 87: Sister Islands Visitors Travel Companions



Travel Companion[2]. 40.4% of Sister Islands stayover visitors surveyed reported that they traveled as a couple. Following couples travel with 26.1% of survey respondents was family travel.

Table 37: Sister Islands Visitors Repeat Visitation

	2013	2014	2015	2016	2017
First Visit	37.0%	41.3%	37.0%	33.7%	30.8%
Repeat Visit	63.1%	58.7%	63.0%	66.3%	69.2%

Repeat Visitation[1].
In 2017, 69.2% of Sister Islands visitors indicated that they had previously visited the Cayman Islands. The highest First-time visits have ever been was in 2014 at 41.3%.

Sister Islands stayover visitors who stated that their main purpose of visit was a Dive Vacation or Visiting Relatives recorded the highest percentage of repeat visitation. All categories recorded a repeat visitation rate above 50%.

Figure 88: Sister Islands Visitors Repeat Visitation

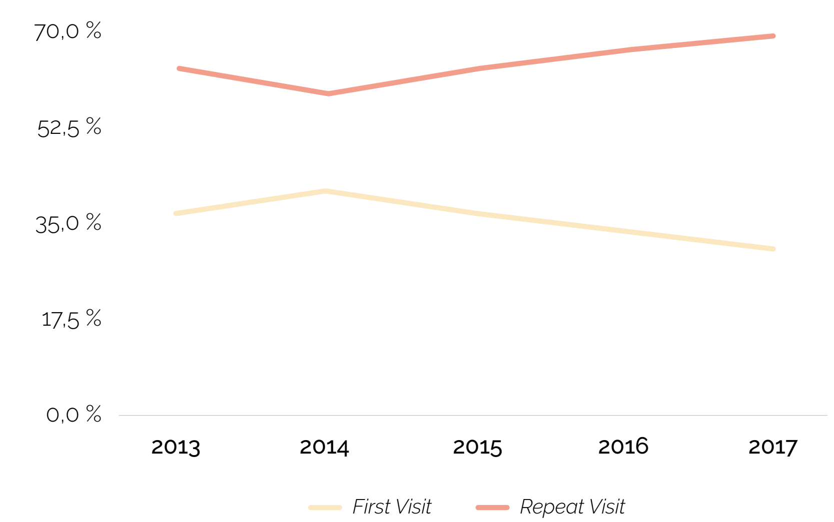
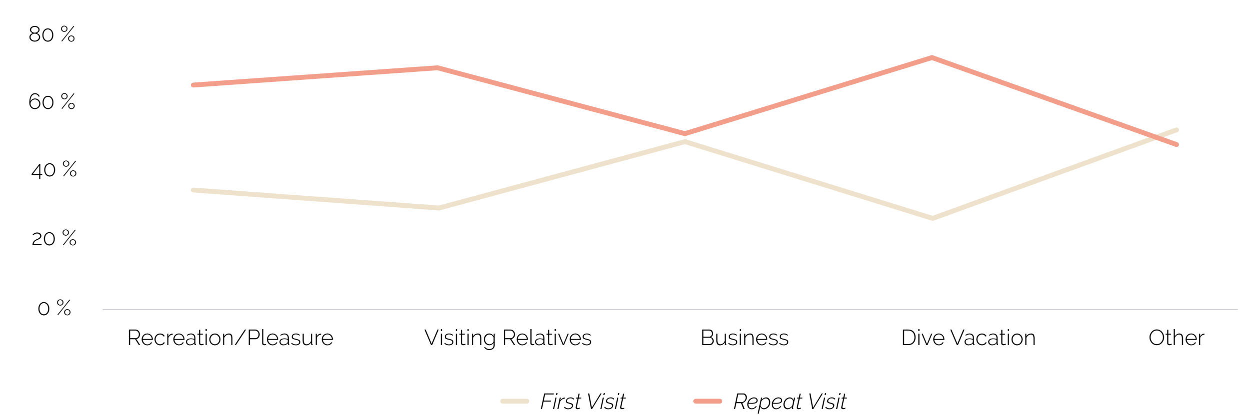


Table 38: Sister Islands Repeat Visit by Purpose of Visit, 2017

	Recreation/ Pleasure	Visiting Relatives	Business	Dive Vacation	Other
First Visit	35%	30%	49%	27%	52%
Repeat Visit	65%	70%	51%	73%	48%

Figure 89: Sister Islands Repeat Visit by Purpose of Visit, 2017



[1] Cayman Islands Immigration Department
[2] CIDOT Sister Islands Visitor Exit Survey 2017

Average Length of Stay[2]

The average length of stay for the Sister Islands in 2017 was 7.6 nights; this was the same in 2016. Visitors who stated that the main purpose of visit was Visiting Relatives stayed in the destination the longest at 8.2 nights followed by Recreation/Pleasure at 7.8 nights. Business travellers had the shortest average length of stay at 5.5 nights.

Over the last five years, repeat visitors stayed longer in the Sister Islands than first-time visitors. Repeat visitor for the previous five years stayed an average 7.9 nights.

Visitors from the largest source market USA stayed 7.5 nights. Europeans and Canadians stayed the longest at 9.9 nights and 8.7 nights respectively.

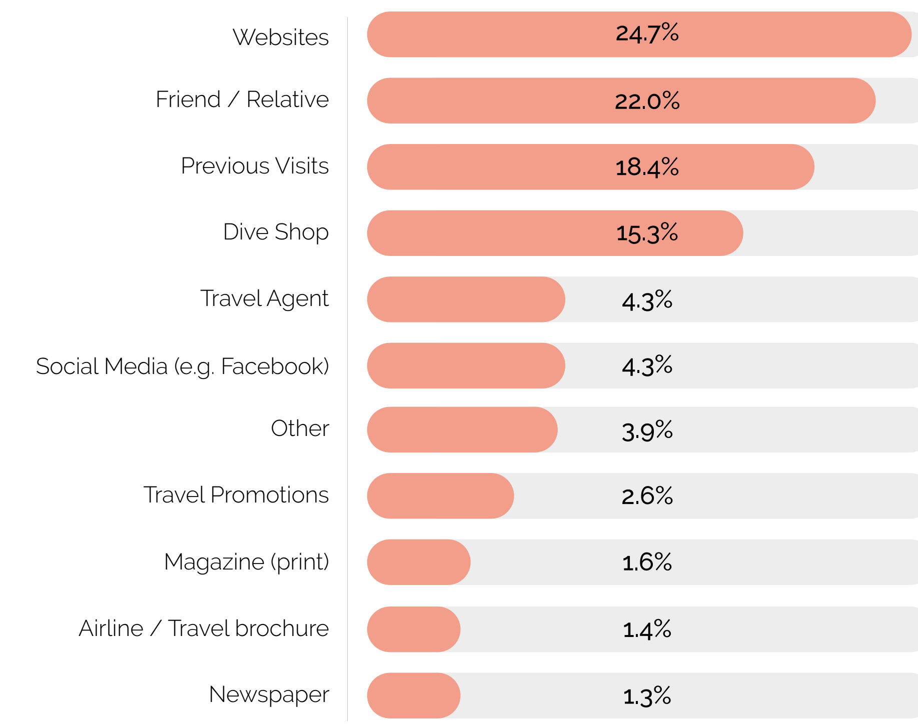
Table 39: Sister Islands Average Length of Stay by Category of Visitor

	2013	2014	2015	2016	2017
OVERALL	7.5	7.7	7.7	7.6	7.6
PURPOSE OF VISIT					
Recreation/Pleasure	7.7	7.7	7.8	7.7	7.8
Visiting Relatives	7.6	8.3	9.0	8.5	8.2
Business	4.7	7.9	5.6	5.3	5.5
Dive Vacation	7.0	7.0	7.0	7.0	6.9
Wedding/Honeymoon	7.5	7.5	7.5	7.5	7.5
Other/Unknown	7.1	7.7	8.2	7.0	6.8
PREVIOUS VISIT					
First Visit	7.3	7.3	7.4	7.2	7.1
Repeat Visit	7.7	7.9	7.9	7.9	7.9
REGION					
USA	7.4	7.4	7.6	7.5	7.5
Canada	8.7	10.0	8.9	9.0	8.7
Europe	9.5	9.3	9.0	8.5	9.9
Latin America	7.4	7.4	10.1	7.8	7.2
Rest of the World	7.2	12.2	8.4	8.0	8.1

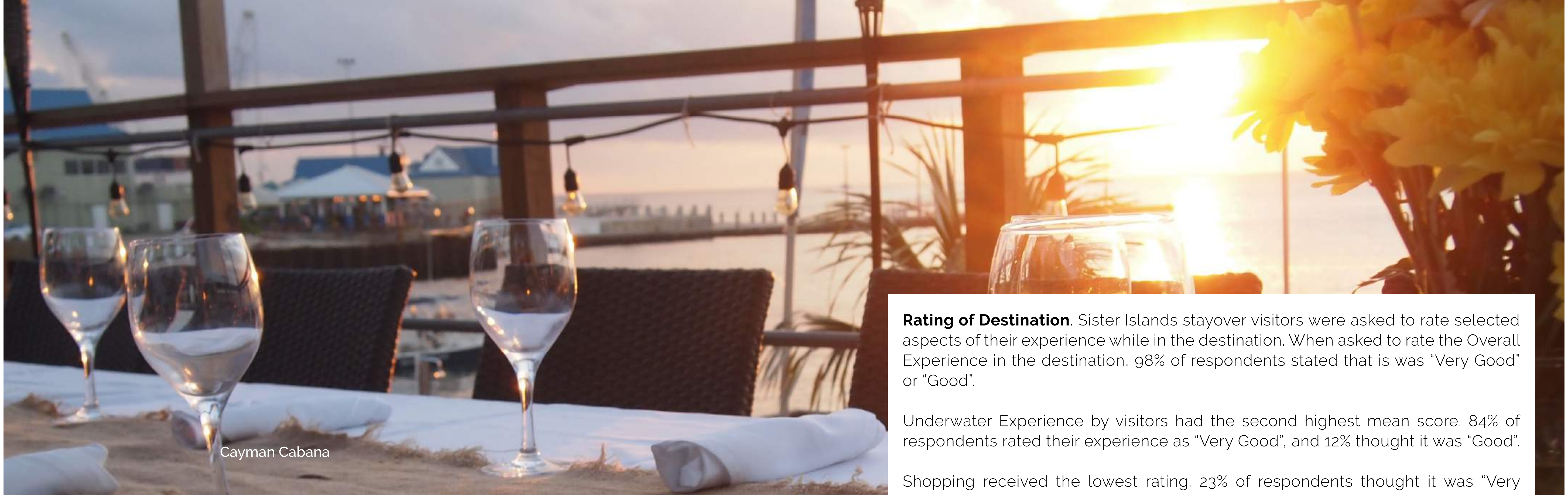
Travel Planning[1]

In 2017, 24.7% of Sister Islands visitors reported that websites helped in their decision to visit the Cayman Islands. Friend/Relative, previous visits and dive shops followed with 22.0%, 18.4% and 15.3% respectively.

Figure 90: Sister Islands Visitors Decision Making in 2017



1 CIDOT Sister Islands Visitor Exit Survey 2017
2 Cayman Islands Immigration Department

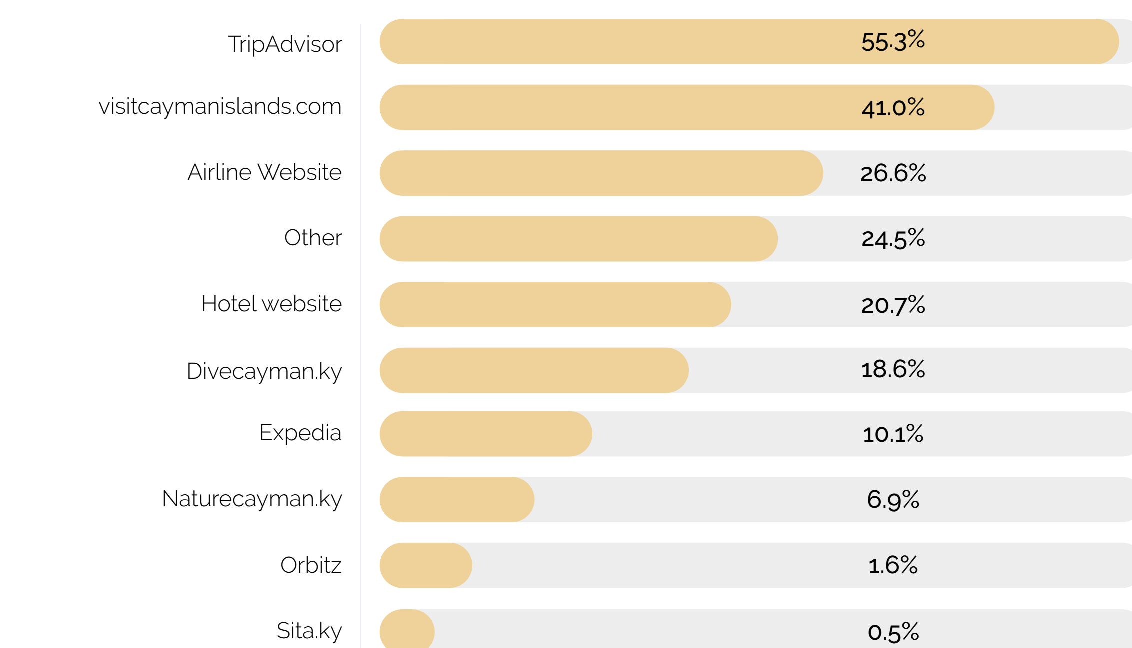


Rating of Destination. Sister Islands stayover visitors were asked to rate selected aspects of their experience while in the destination. When asked to rate the Overall Experience in the destination, 98% of respondents stated that is was "Very Good" or "Good".

Underwater Experience by visitors had the second highest mean score. 84% of respondents rated their experience as "Very Good", and 12% thought it was "Good".

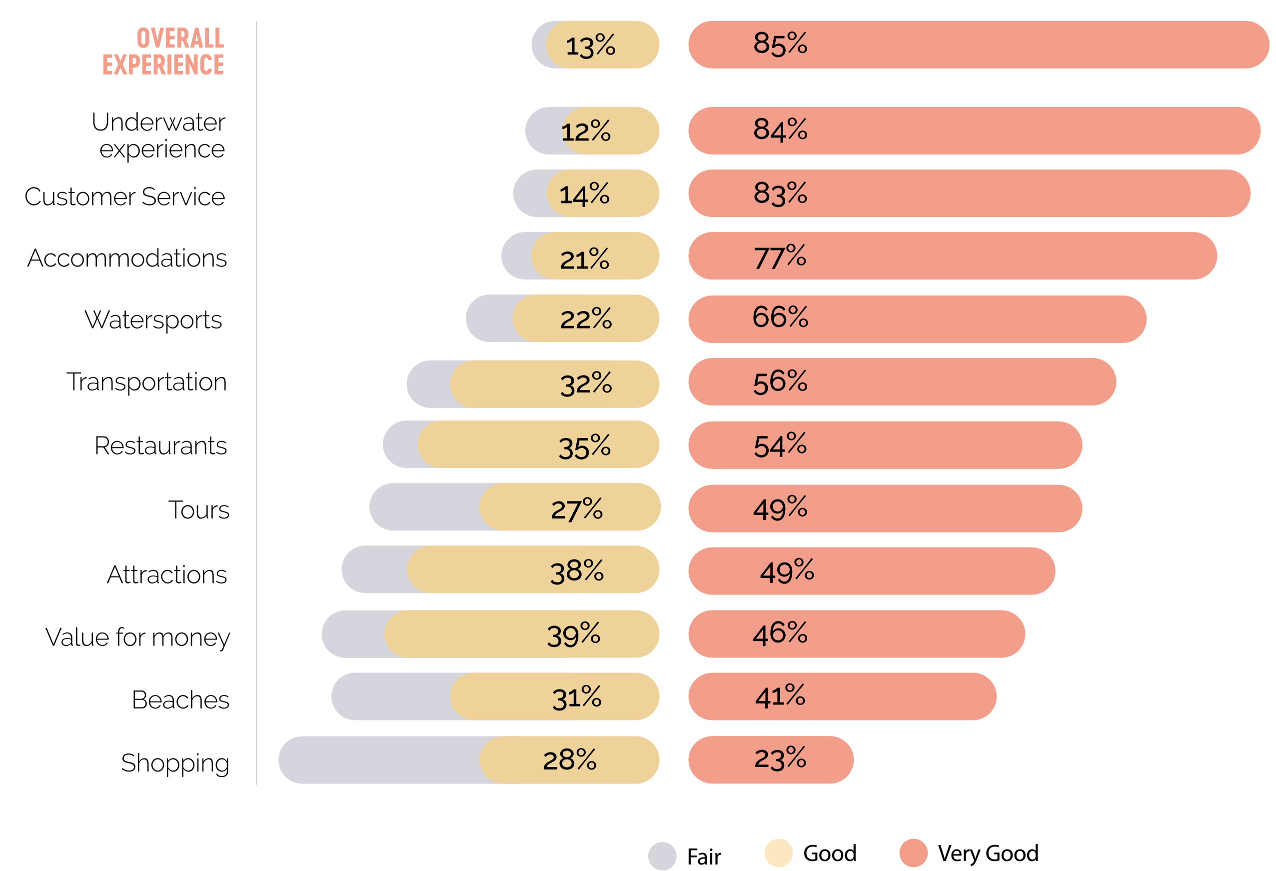
Shopping received the lowest rating. 23% of respondents thought it was "Very Good", 28% rated it as "Good", and 24% rated it as "Fair".

Figure 91: Websites Used by Sister Islands Visitors in Planning Their Trip

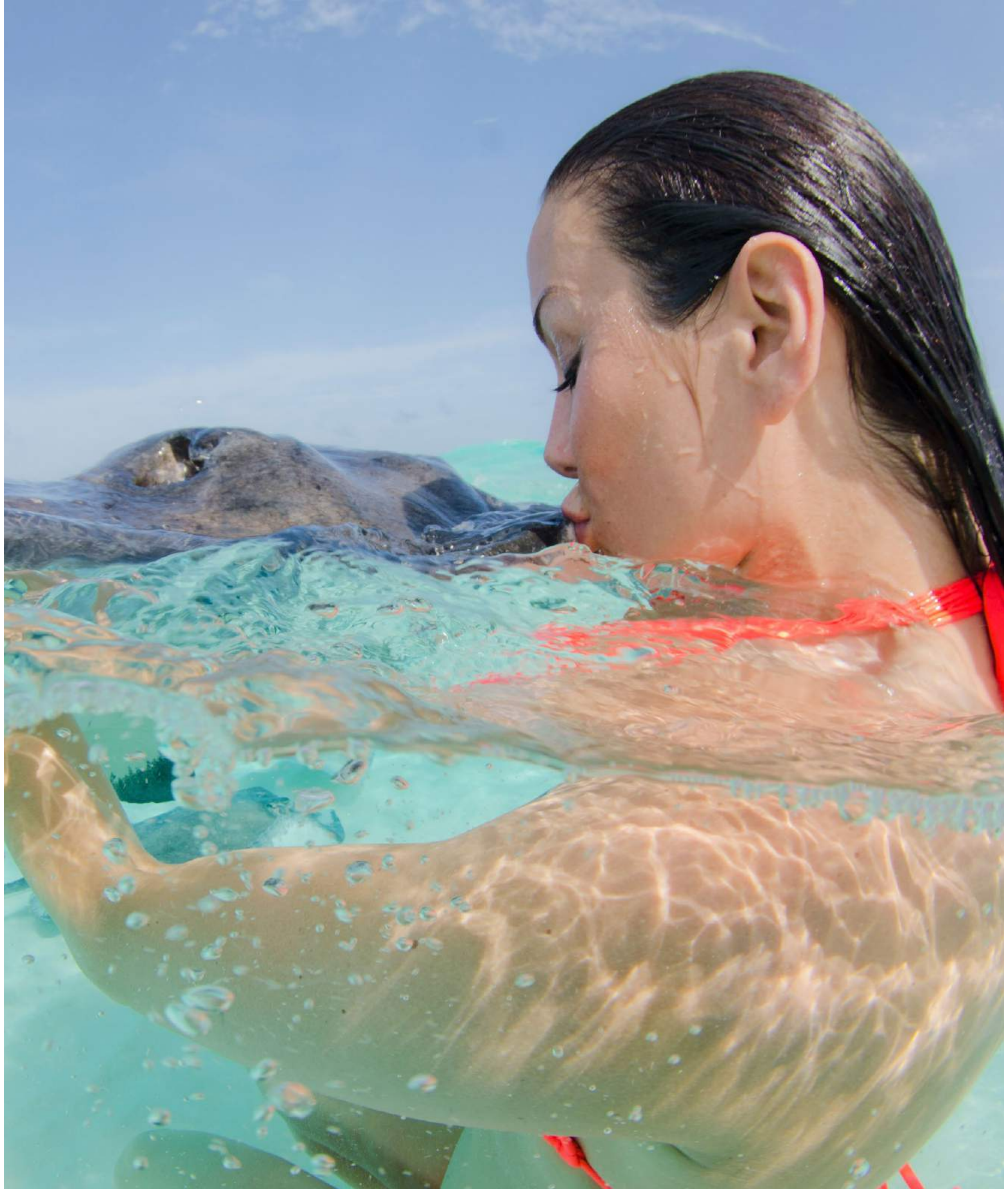


Stayover visitors to the Sister Islands who stated that websites assisted in their decision to visit were asked which websites. TripAdvisor was the most popular website with 55.3% of survey respondents reporting that the website helped in their decision to visit the destination. Visitcaymanislands.com was second with 41.0% of respondents stating that they were influenced by that option.

Figure 92: Sister Islands visitors Rating of the Destination, 2017



Source: CIDOT Sister Islands Visitor Exit Survey 2017



WHO ARE OUR CRUISE VISITORS?

DEMOGRAPHIC PROFILE

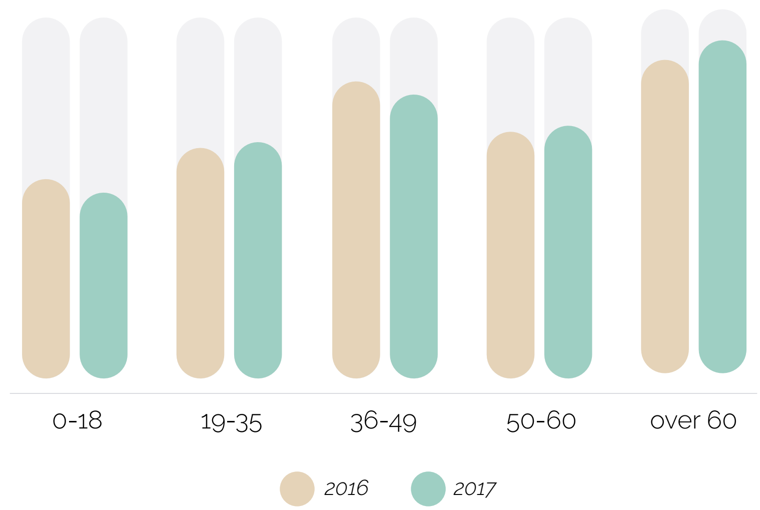
According to the Cruise Travel Report published by CLIA in January 2018, cruisers see cruises as a great way to sample different destinations and cities for later vacations. Millennials are inherent snackers, they love to try new things before they go all in. And, increasingly they are likely to return to destinations visited first via a cruise. Indeed, all age cohorts (except Gen X) show a greater likelihood of returning to a destination visited on a cruise than in 2016."

The report also reported that "millennials love to travel in luxury; 24% of them have traveled on a luxury line in the last three years versus an overall average for that class of 10%. Millennials also represent a higher share of the premium market. Regardless, contemporary cruises are the most popular option (88%), premium (35%) and luxury (10%)."

Age

Cruise passengers over the age of 60 accounted for 27.5% of cruise passenger arrivals to the Cayman Islands in 2017. The over 60 group increased by 1.4 percentage point over 2016. The 36-49 age group was second with 20.4% of passengers and followed closely behind was the 50-60 age group at 19.5%. The median age of cruise passenger arrival to the destination in 2017 was 48 years old.

Figure 93: Age of Cruise Passengers Visiting the Destination in 2017



Cruise passengers from the UK were generally older than visitors from other regions. The cruise passenger from the UK had a median age of 59 years. 47% of passengers from the UK were over 60 years old.

The median age for Canadian cruise passengers to the destination was 54 years in 2017. 37% of Canadian cruise passengers were over 60 years old.

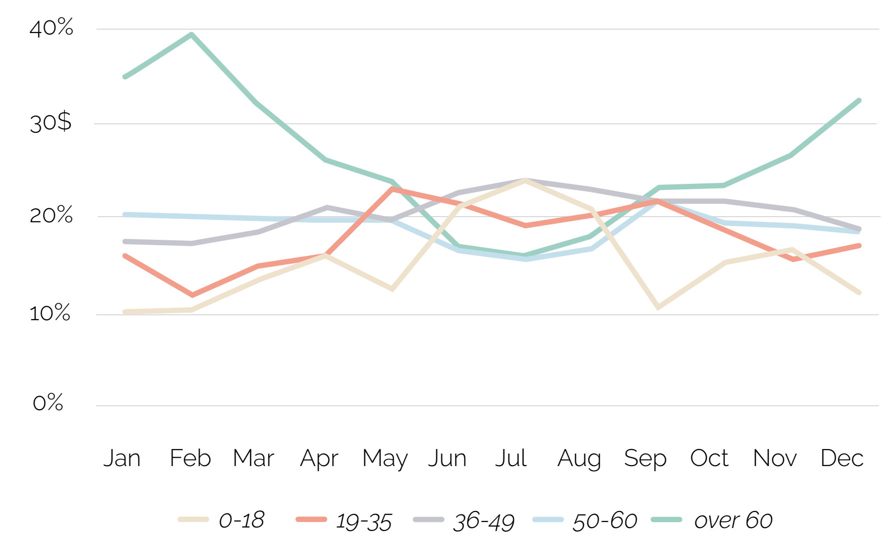
As with stayover arrivals, the Latin American cruise passenger had the lowest median age at 43 years. 50% of cruise passengers from the region were between the age of 19 and 49 years old. Latin America was also the only region where the top age group was not the over 60 group.

Figure 94: Age of Cruise Passengers by Region, 2017

Source: Port Authority of the Cayman Islands

For nine months in 2017, the dominant age group was the over 60 category. Eight of the nine months dominated by individuals Over 60 was the highest eight months for cruise passenger arrivals in 2017. The 19-35 and 0-18 age groups peaked in summer.

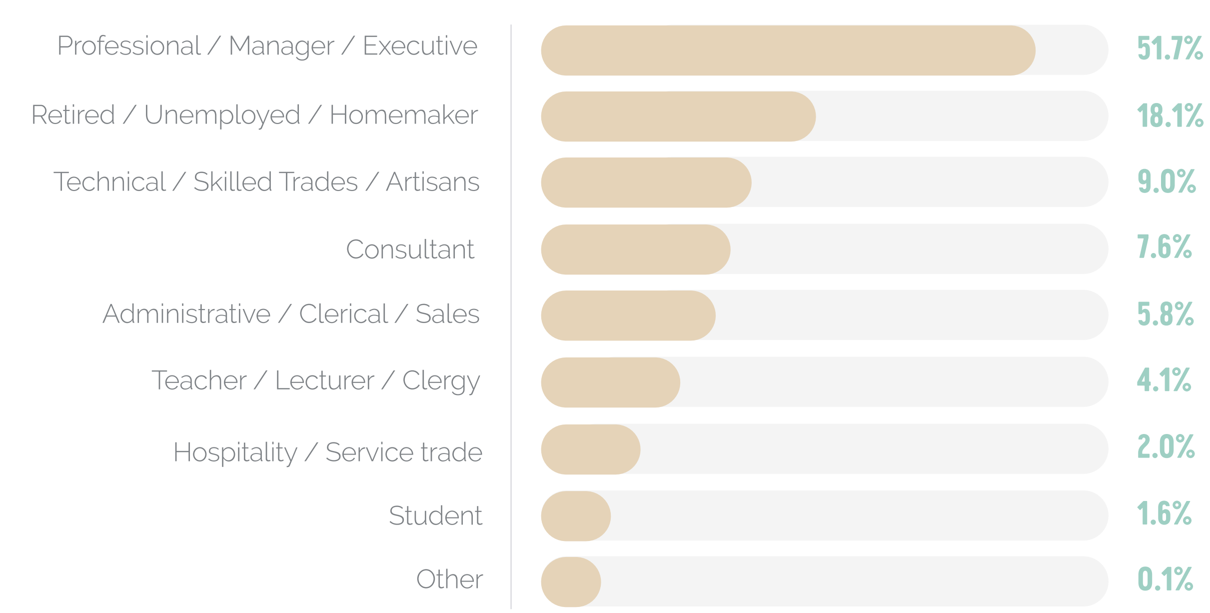
Figure 95: Cruise Passengers Age Distribution by Month, 2017



Occupation

Cruise visitors who were Professional/Manager/Executive represented 51.7% of cruise visitors surveyed in 2017. Retired/Unemployed/Homemaker followed with 18.1%.

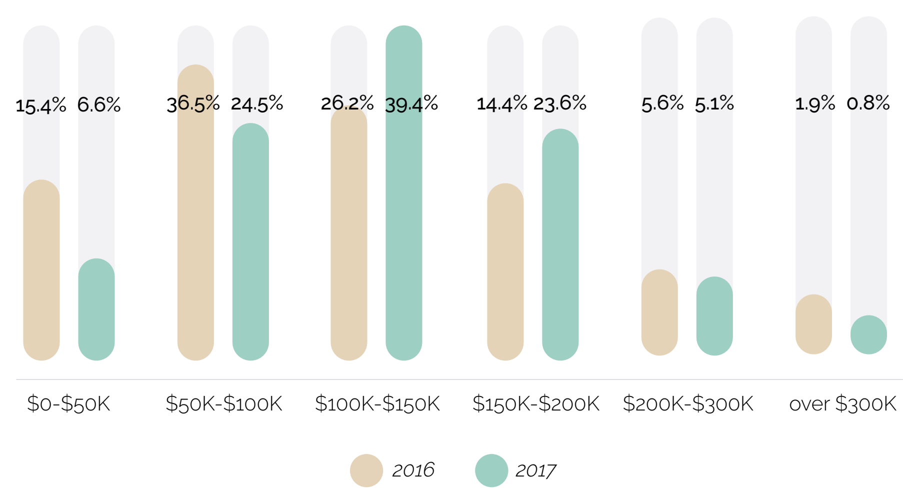
Figure 96: Occupation of Stayover Visitors, 2017



Household Income

Based on results from the 2017 Cruise Visitor Exit Survey, 39.4% of visitors reported having an annual household income between US$100,000 and US$150,000. The number of cruise visitors falling in the US$100,000-US$150,000 average household income range in 2017 was an increase over the 26.2% reported in 2016.

Figure 97: Annual Household Income, 2017



TRIP DETAILS

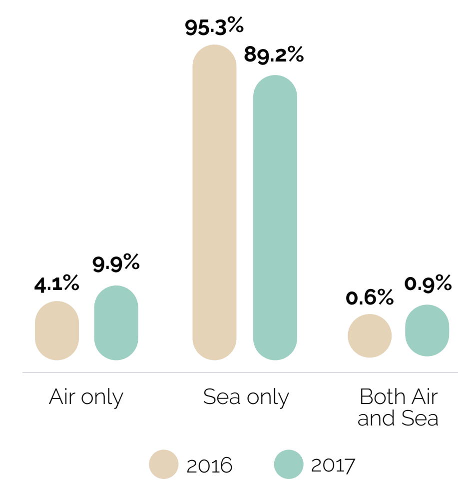
Repeat Visitation

Of the 10.1% of cruise respondents who previously visited the destination, 36.0% reported visiting at least once per year and 60.4% visit less frequently.

Figure 98: Frequency of Previous Visits

A significant portion of cruise respondents (89.2%) who previously visited the destination did so on a cruise trip.

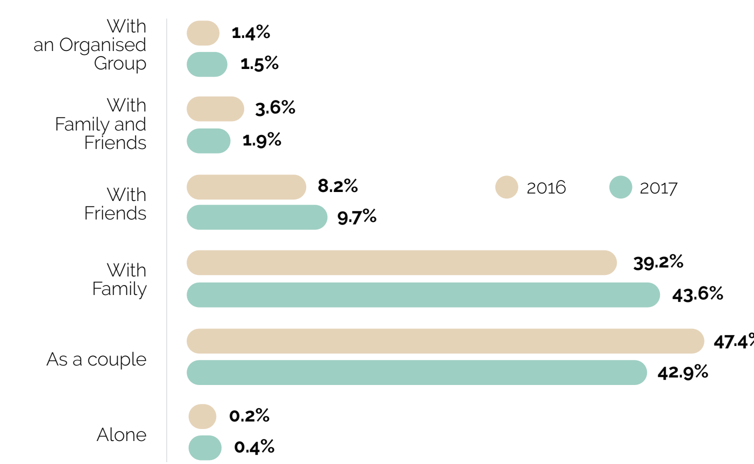
Figure 99: Mode of Transport for Repeat Visits



Source: CIDOT Visitor Exit Survey 2017

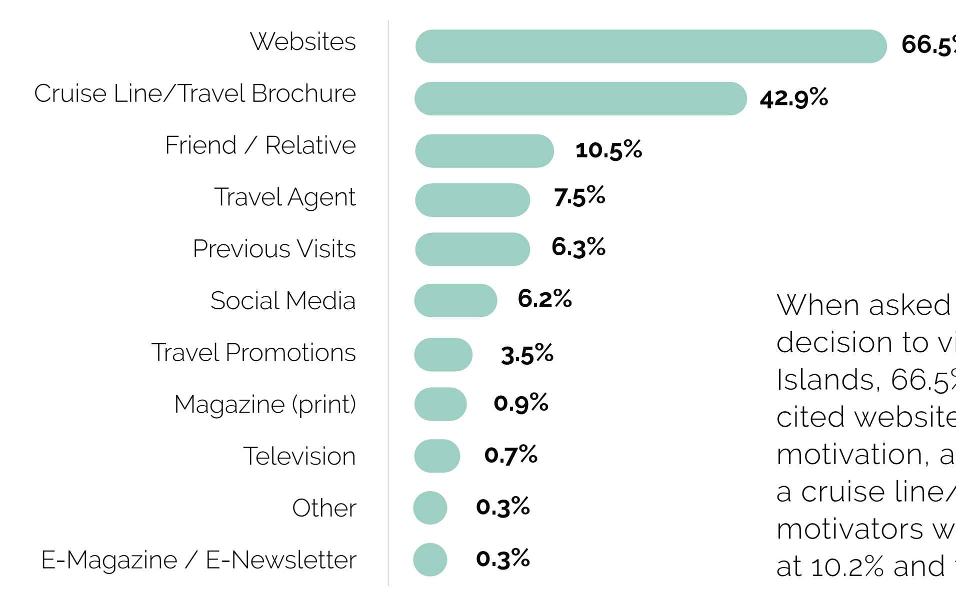
Couples account for 47.4% of cruise visitors surveyed this was followed by travelling as a family group which was 39.2% and with friends 8.2%.

Figure 100: Travel Companions of Cruise Visitors



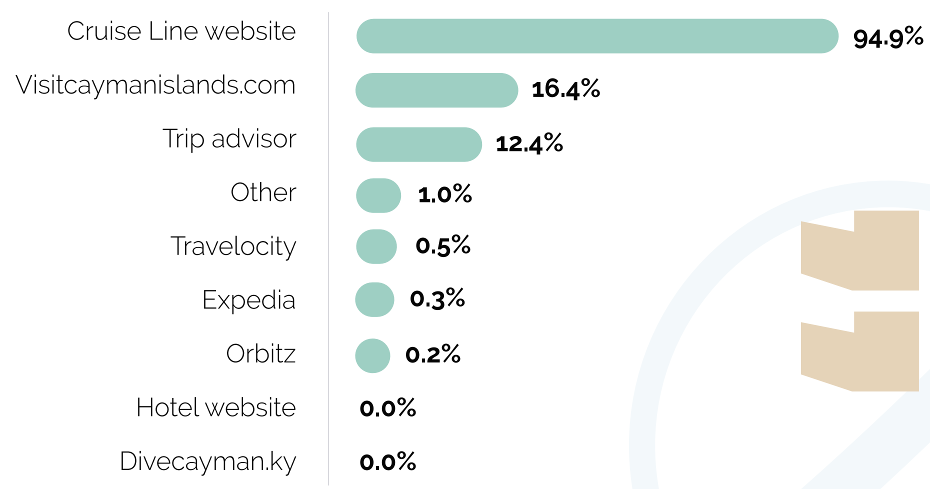
TRAVEL PLANNING

Figure 101: Decision Making Motivator, 2017



When asked what helped in their decision to visit the Cayman Islands, 66.5% of respondents cited website as their primary motivation, and 42.9% identified a cruise line/ travel. Other motivators were friend/relative at 10.2% and travel agent at 7.5%.

Figure 102: Websites Used in Planning Trip, 2017



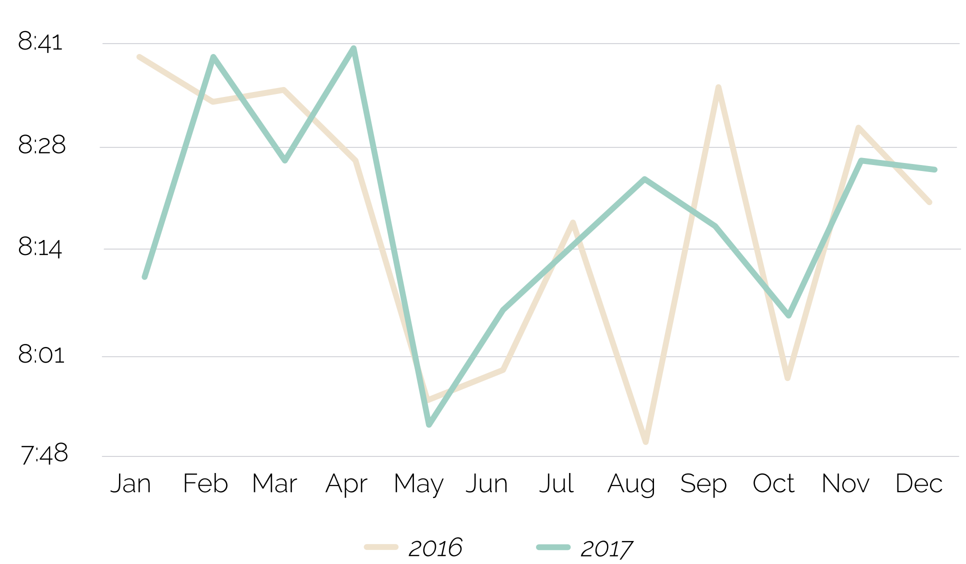
When asked what websites helped in the decision to visit the destination on a cruise, 94.6% of respondents reported that the cruise line website was the leading motivator.

Cruise passengers stayed an average 6 hours ashore in 2017.

Average Time Ashore

On average a cruise ship remained in the destination for 8 hours and 22 minutes. Cruise ships stayed between 7 hours and 56 minutes and 8 hours and 45 minutes in 2017. Ships were docked the longest on Wednesday and shortest on Friday. Ships stayed longer in the peak season of February – April and November – December.

Figure 103: Cruise Ship Length of Stay in Port by Month, 2017



CIDOT Visitor Exit Survey 2017

Cruise stayed the longest on Wednesday with an average 8 hours and 45 minutes.

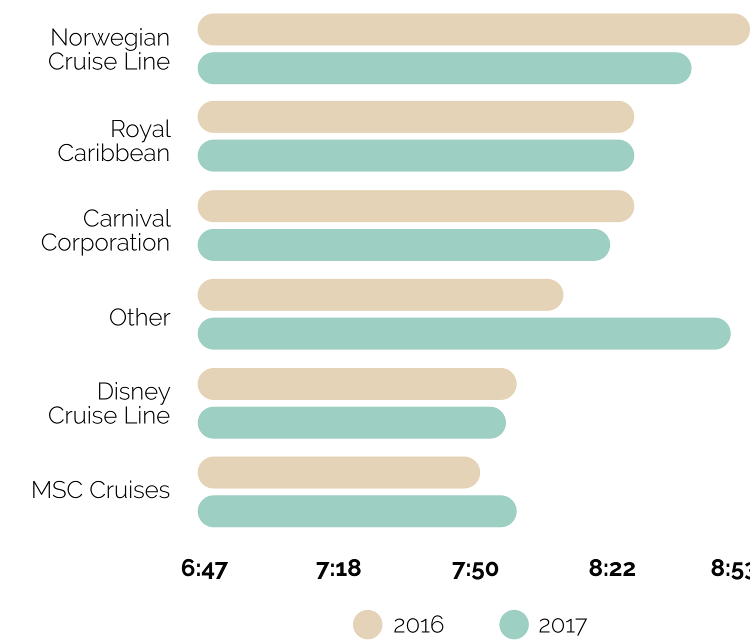
Table 40: Cruise Ship Length of Stay in Port by Day of Week, 2017

	2016	2017
Sunday	8:14	8:26
Monday	8:18	8:06
Tuesday	8:12	8:11
Wednesday	8:32	8:45
Thursday	8:23	8:19
Friday	8:04	7:56
Saturday	9:02	8:36
AVERAGE	**8:23**	**8:22**

Source: Port Authority of the Cayman Islands

Norwegian Cruise Line and Royal Caribbean ships stayed the longest. MSC Cruises consistently stayed shorter than other cruise lines.

Figure 104: Length of Stay in Port by Cruise Company, 2017



Cayman Turtle Centre

WHAT DO THEY THINK ABOUT US?

Heroes Square

TRAVEL EXPERIENCE

Attractions Visited

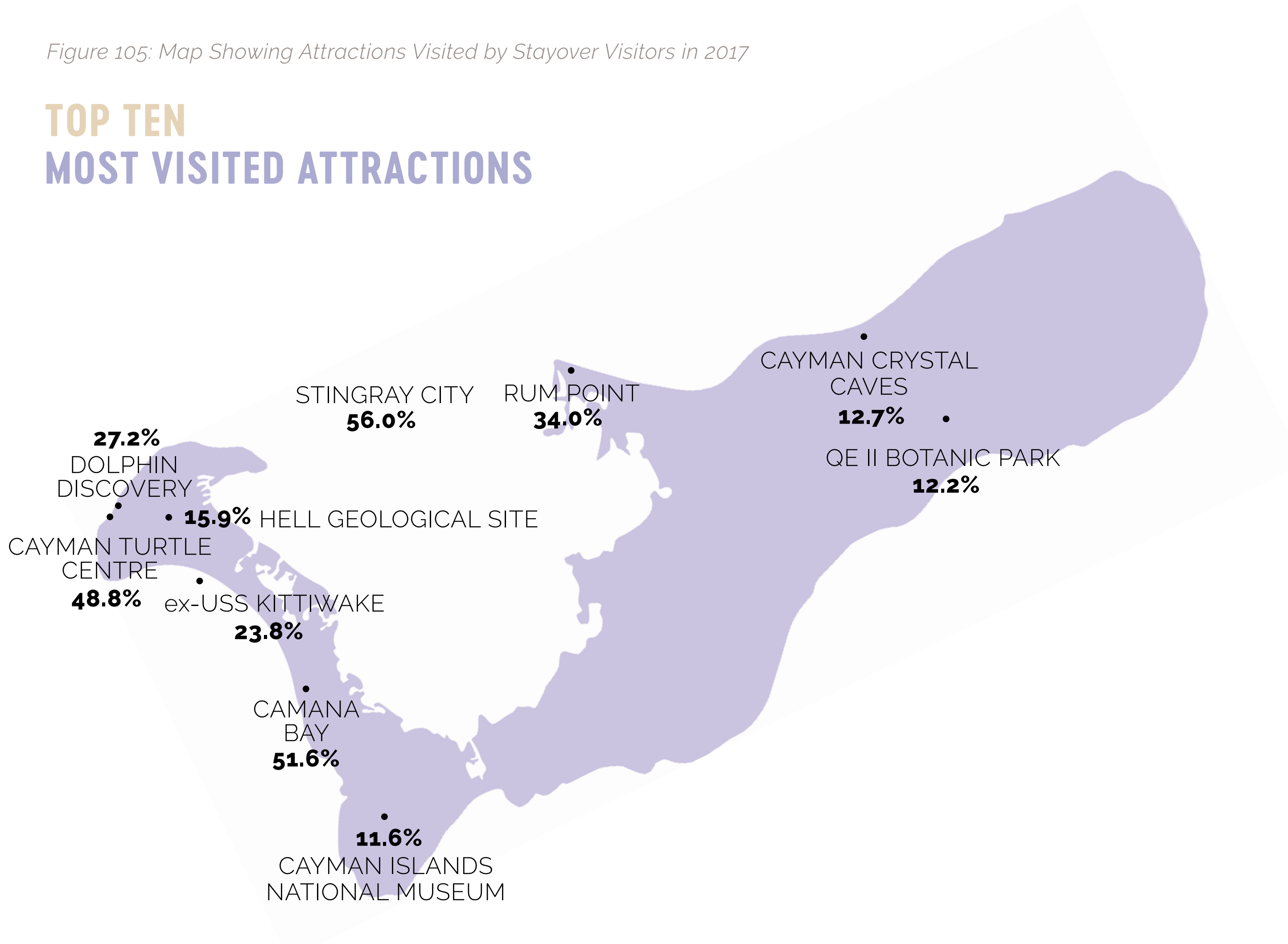
Stingray City ranked as the most visited attraction by stayover visitors in 2017, with 56.0% of survey respondents reporting that they visited the attraction. Camana Bay was the second most popular place visited (51.6%) by respondents.

Other popular places visited by the survey respondents were Cayman Turtle Centre (48.8%), Rum Point (34.0%) and Dolphin Discovery (27.2%).

Cayman Turtle Centre and Camana Bay had the largest increase in visitation by survey respondents in 2017 compared to 2016.

Figure 105: Map Showing Attractions Visited by Stayover Visitors in 2017

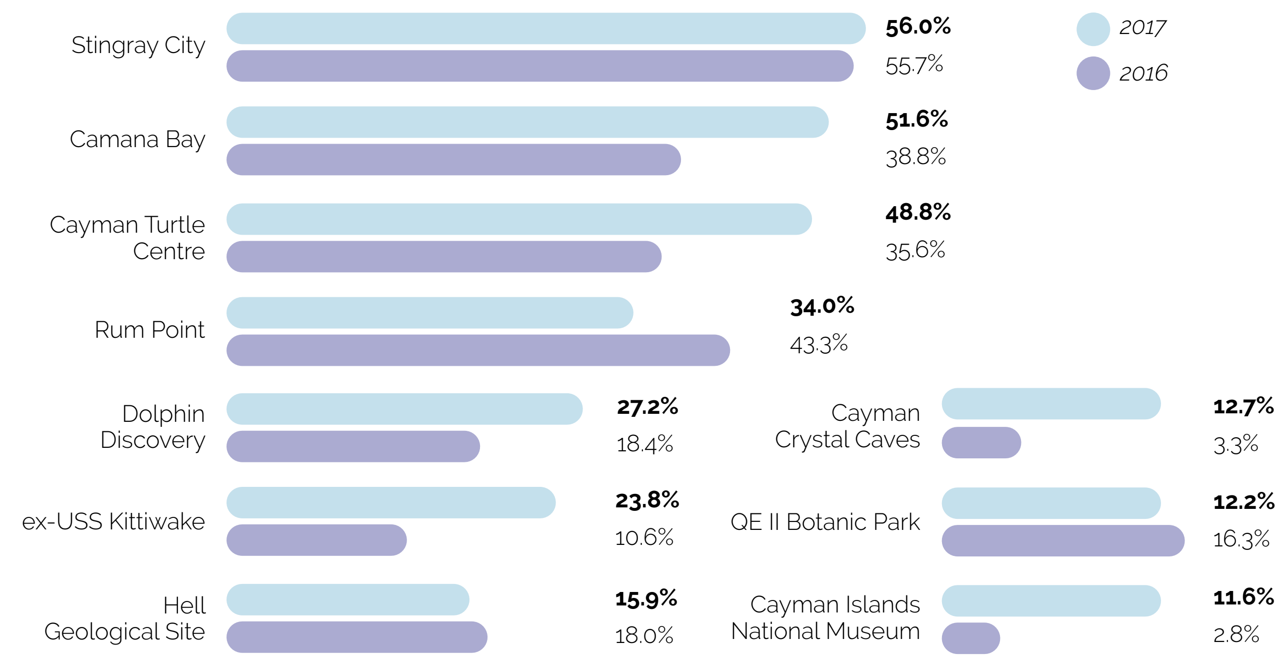
TOP TEN
MOST VISITED ATTRACTIONS



Source: CIDOT Visitor Exit Survey 2017

[1]2016 Revised

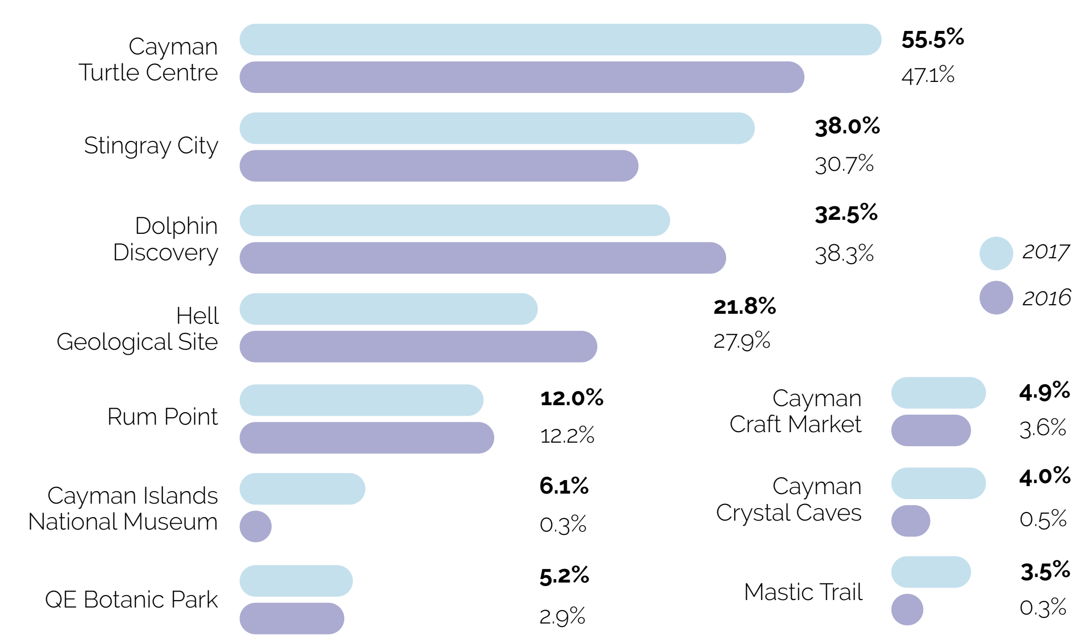
Figure 106: Attractions Visited by Stayover Visitors



In 2017, Cayman Turtle Centre was the most visited attraction by persons on cruise excursions, with 55.5% of survey respondents reporting that they visited the attraction. Stingray was the second most popular attraction visited (38.0%) by respondents.

Other popular places visited by survey respondents were Dolphin Discovery (32.5%), Hell Geological Site (21.8%) and Rum Point (12.0%).

Figure 107: Attractions Visited by Cruise Visitors



Source: CIDOT Visitor Exit Survey 2017

Rating of Destination

Table 41: Stayover visitors Rating of the Destination for 2017

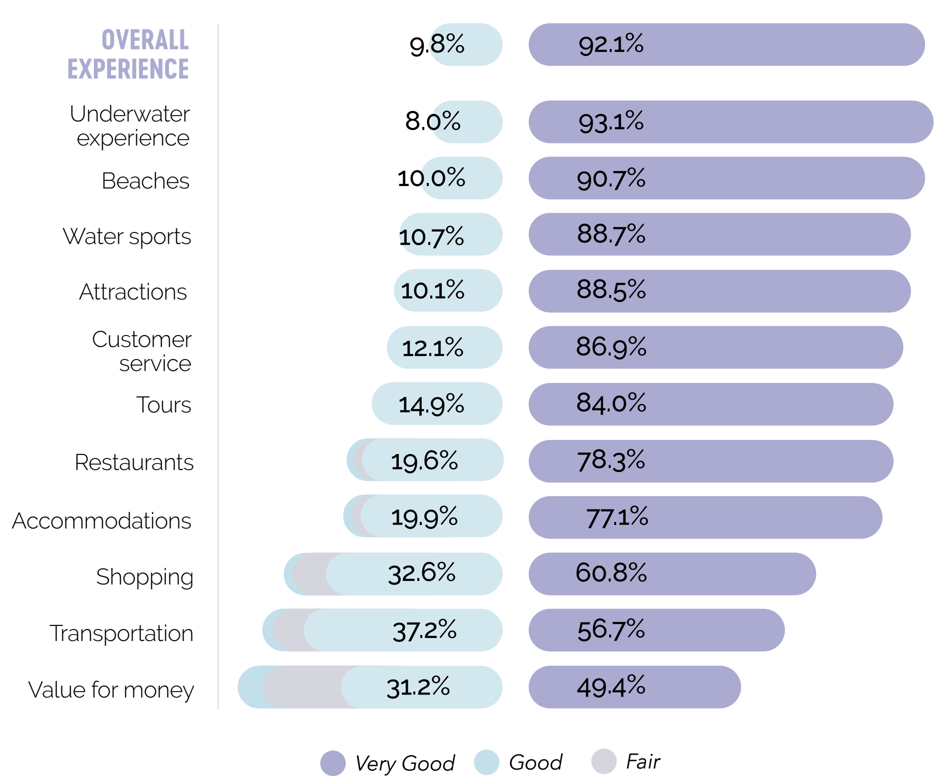
	MAIN SCORE
OVERALL EXPERIENCE	9.81
Underwater experience	9.84
Beaches	9.78
Water sports	9.76
Attractions	9.73
Customer service	9.71
Tours	9.66
Restaurants	9.51
Accommodations	9.47
Shopping	9.07
Transportation	9.00
Value for money	8.51

Stayover visitors were asked to rate selected aspects of their experience while in the destination. When asked to rate the Overall Experience in the destination,98.9% of respondents stated that it was "Very Good" or "Good".

Underwater Experience of visitors had the highest mean score. 93.1% of respondents rated their experience as "Very Good", and 5.8% thought it was "Good".

Value for Money had the lowest mean score. 49.4% of respondents thought it was "Very Good", 31.2% rated it as "Good", and 15.5% rated it as "Fair".

Figure 108: Stayover visitors Rating of the Destination for 2017



Cruise visitors were asked to rate selected aspects of their experience while in the destination. When asked to rate the Overall Experience in the destination, 99.2% of respondents stated that is was "Very Good" or "Good".

Experiences with Water Sports had the highest mean score. 98.1% of respondents rated their experience as "Very Good" and 1.6% thought it was "Good". Restaurants had the lowest mean score. 60.2% of respondents thought it was "Very Good" and 36.7% rated it as "Good".

Figure 109: Cruise visitors Rating of the Destination for 2017

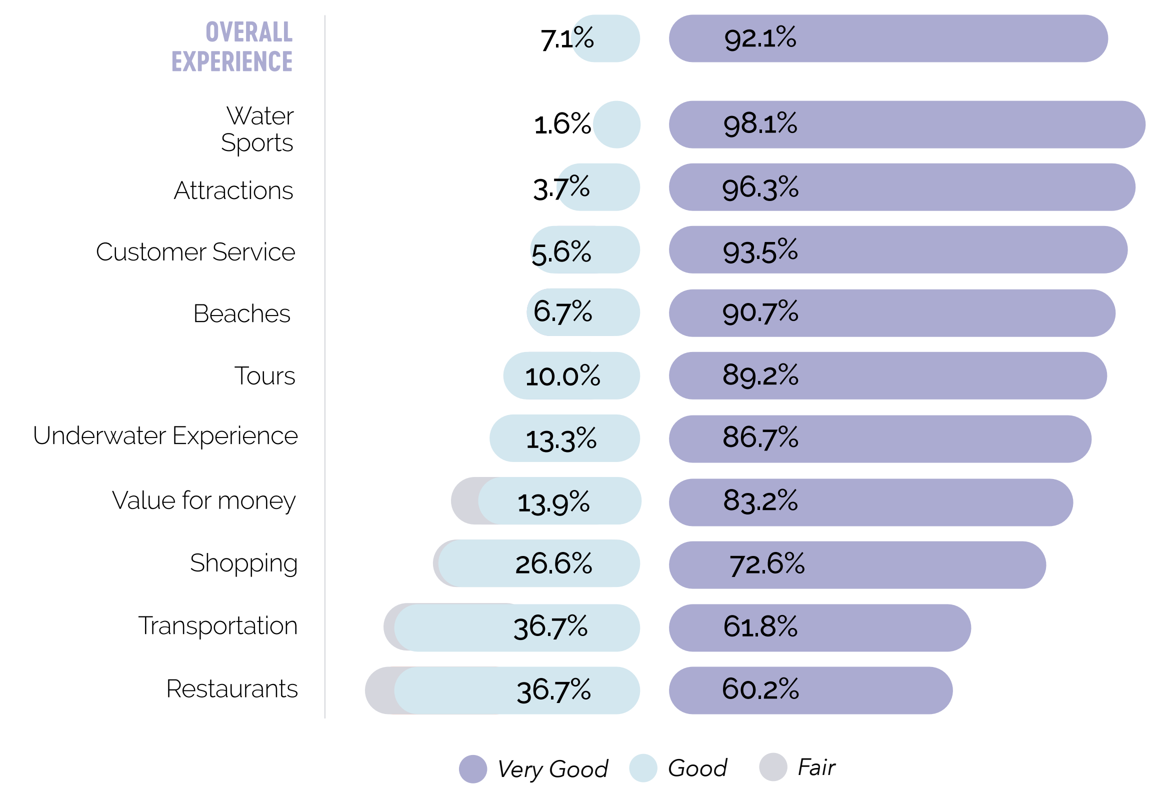


Table 42: Cruise visitors Rating of theDestination for 2017

	MAIN SCORE		MAIN SCORE
OVERALL EXPERIENCE	9.83	OVERALL EXPERIENCE	9.83
Water sports	9.96	Underwater experience	9.73
Attractions	9.93	Value for money	9.60
Customer service	9.84	Shopping	9.43
Tours	9.76	Transportation	9.20
Beaches	9.74	Restaurants	9.13

Source: CIDOT Visitor Exit Survey 2017

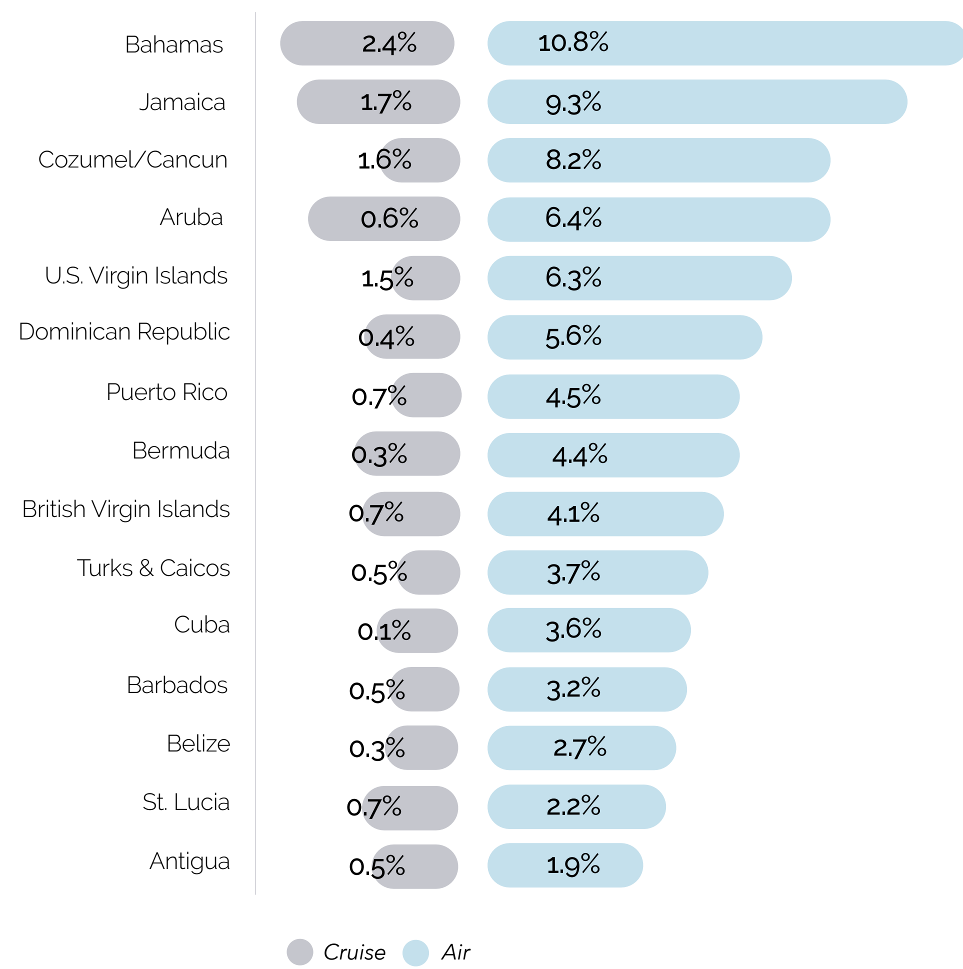
Rating of Destination

Stayover survey respondents were given a list of Caribbean destinations and asked if they visited any of those destinations in the last three years by air or cruise. The Bahamas was previously visited on a stayover trip by 10.8% of survey respondents. Jamaica followed with 9.3% and Cozumel/Cancun 8.2%.

The Bahamas was also the most visited cruise destination by respondents of the stayover survey. The survey showed that 2.4% of stayover respondents previously visited the Bahamas on a cruise and 1.7% previously visited Jamaica.

When comparing air versus cruise visit for stayover visitors to other destinations, 86% of the previous visits were by air and 14% by cruise.

Figure 110: Caribbean Destinations Visited in the Last 3 Years by Stayover Visitors



When stayover survey respondents were asked to rate the Cayman Islands to previous travel experiences in the last three years, 65.0% said that the Cayman Islands was much better than the other destinations while 19.7% said it was somewhat better.

Figure 111: Stayover Visitors Rating of the Cayman Islands Versus Other Destinations

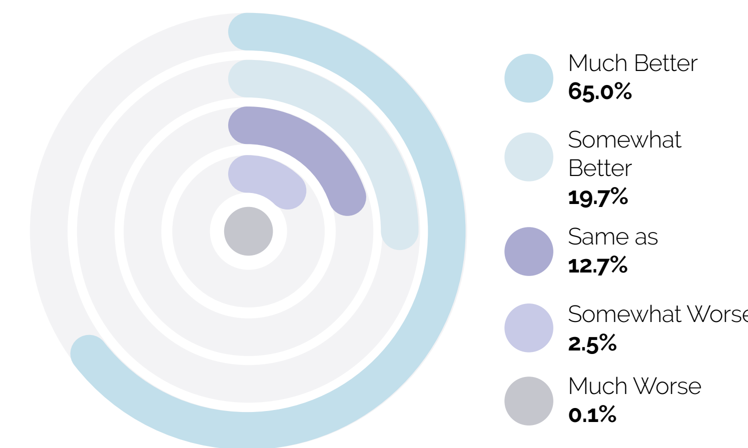
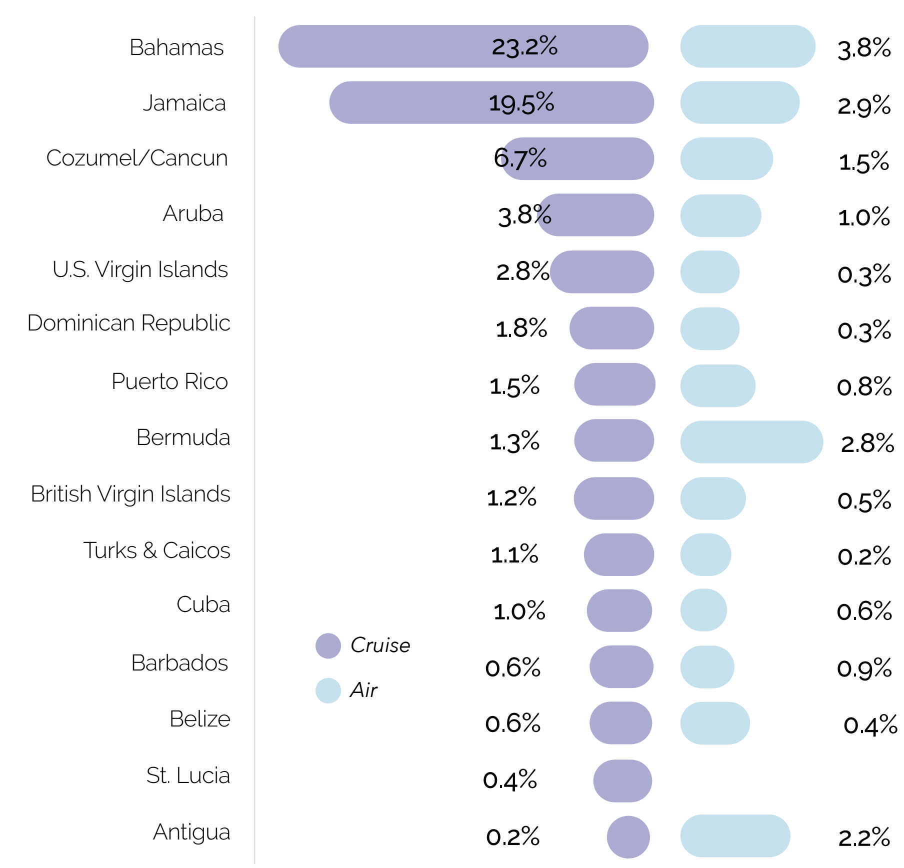


Figure 112: Caribbean Destinations Visited in the Last 3 Years by Cruise Visitors



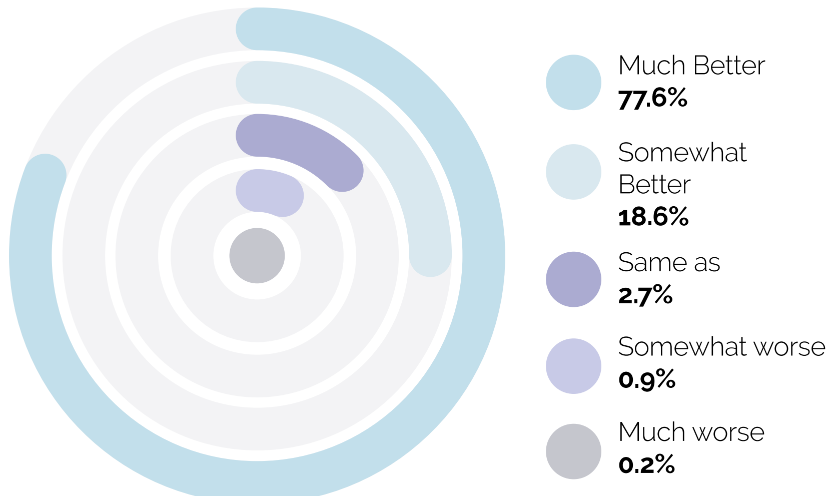
Cruise survey respondents were provided with the same list and asked if they visited any of the destinations in the last three years by cruise or air. Of respondents who stated that they visited a Caribbean destination, 23.2% of the trips were to Jamaica by cruise, 19.8% visited Cozumel/Cancun, and 6.7% visited the Bahamas by cruise.

For respondents who visited a Caribbean destination by air, Jamaica was the most visited at 3.8%, followed by Cozumel/Cancun at 2.9% and Dominican Republic 2.8%. When comparing air versus cruise visit, 78% of the previous visits were by cruise and 22% by air.

Source: CIDOT Visitor Exit Survey 2017

For the cruise visitor respondents, 77.7% said that the Cayman Islands was much better than the other destinations 18.6% said it was somewhat better.

Figure 113: Cruise Visitors Rating of the Cayman Islands Versus Other Destinations

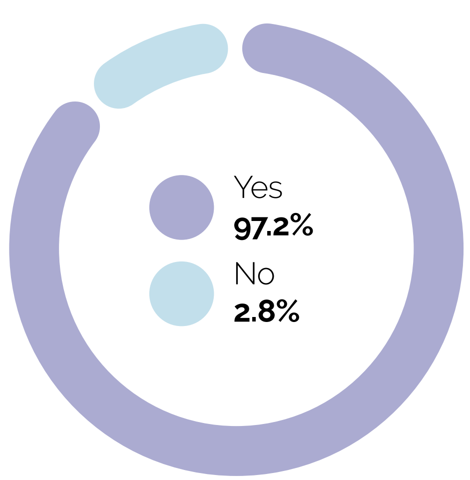


TRAVEL INTENTIONS

Intentions to Return to the Destination

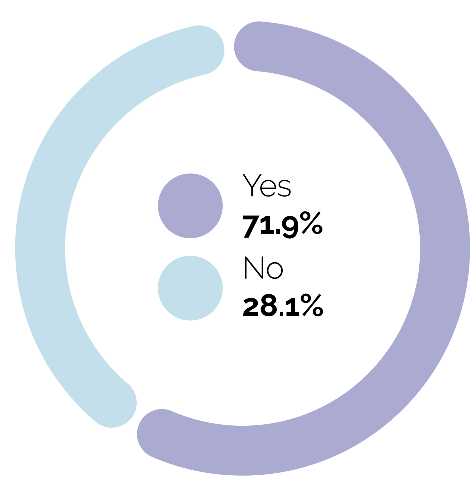
97.2% of air survey respondents reported that they would return to the destination by air.

Figure 114: Stayover Visitors Intention to Return to the Cayman Islands



71.9% of cruise survey respondents reported that they would return to the destination by air.

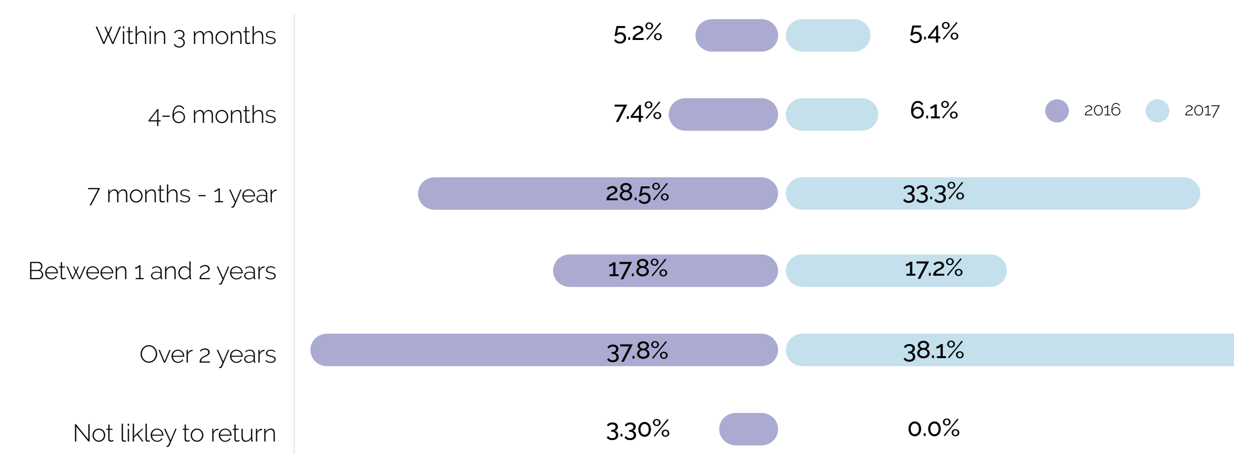
Figure 115: Cruise Visitors Intention to Return to the Cayman Islands



Anticipated Return

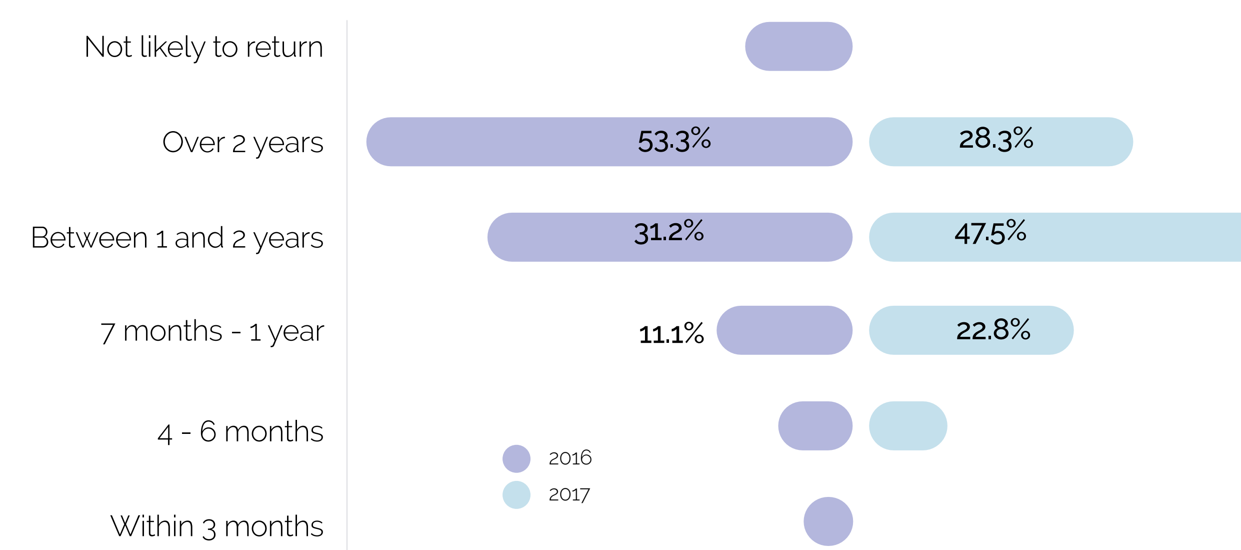
Of those stayover survey respondents who said they would return to the destination, 38.1% anticipate returning in over 2 years and 33.3% between 7 months and 1 year.

Figure 116: Stayover Visitors Anticipated Timeline to Return to the Cayman Islands



For cruise visitors, of those respondents who would return to the destination, 47.5% anticipate returning between 1 and 2 years and 28.3% in over 2 years.

Figure 117: Cruise Visitors Anticipated Timeline to Return to the Cayman Islands



Source: CIDOT Visitor Exit Survey 2017

WHY PRESENT ALL THIS DATA?

CONCLUSION

For years, the destination has been driven to perform and measured this performance by its tourism arrivals. The performance of the Cayman Islands in 2017 was influenced by improved global economic conditions, increased airlift, strategic marketing initiatives and new accommodation products. UNWTO reported that international tourism increased by 6.7% in 2017 compared to 2016. International stayover visitation to the Caribbean saw growth of 1.7% according to CTO. Growth in the Caribbean was impacted by the devastation caused by the September hurricanes and the subsequent hotel closures. Stayover arrivals to the Caribbean declined by 6.9% from September to December 2017.

Total visitation to the Cayman Islands was 2,146,847 persons. Visitation increased by 2.36% in 2017. Stayover arrivals increased by 8.55% and cruise passenger arrivals increased by 0.97%. Visitor expenditure in 2017 was KY$651.7 million.

Stayover visitation recovered from marginal growth of 0.67% in 2015 and 0.02% in 2016 to an impressive 8.55% increase in 2017. The United States was the primary driver of growth and accounted for 81.49% of total visitation.

The destination welcomed 418,403 stayover visitors in 2017. Stayover visitors was 19.49% of total visitation in 2017. These stayover visitors spent KY$497.6 million. Spending by stayover visitors accounted for 74.17% of total visitor expenditure.

The destination has seen an average annual stayover arrival growth of 4.91% for the period 2013-2017; Latin America (8.02%) recorded the highest average annual growth rate. USA (6.46%), UK and Ireland (1.72%) and Canada (1.16%) also recorded growth rates. Continental Europe (-10.01%)and Rest of the World (-2.14%) were regions to record a decline.

Cruise passenger arrivals were 1,728,444 persons and accounted for 80.51% of visitation. Cruise passengers spent KY$154.0 million in the destination. The Cayman Islands recorded the fourth highest cruise passenger arrivals in the Caribbean region. Only the Bahamas, Cozumel and Jamaica had more cruise visitors.

Beach Bubbles

Nationals of the United States accounted for 69.20% of cruise passengers to the destination in 2017. Continental Europe (12.10%) and Latin America (7.40%) followed. The main port of embarkation for cruise passengers was Miami and Galveston. Carnival Corporation brought 51.58% of the passengers that visited the destination.

The average daily spending for a stayover visitor was KY$188.79 and $98.78 for a cruise visitor. The government collected KY$26.6 million in taxes and fees from tourism accommodations.

International air capacity saw growth of 6.3% in 2017 with the capacity to the Cayman Islands growing at a higher rate of 6.5% or an additional 54,047 seats. One of every three stayover visitors entered the destination on American Airlines. The destination saw 58.78% of the stayover visitors flying from Miami International, Douglas International Airport (Charlotte), Hartsfield-Jackson International Airport (Atlanta) and John F Kennedy International Airport (NY).

The median age for the stayover visitor in 2017 was 44 years old; female visitation was 52.15% of total visitation, and 42.67% of visitors identified themselves as being professionals.

The average length of stay for visitors was 6.20 nights with the main purpose of visit being Recreation/Pleasure with 76.80%. 48% of visitors previously visited the destination.

The median age of cruise passengers was over 48 years old, and 51.70% of visitors identified themselves as being a professional/manager/executive.

For 2017, cruise ships stayed an average 8:22 hours in the destination and passengers stayed an average 6 hours on land. The main cruise day was Wednesday's which accounted for 28.55% of passenger arrivals.

"International travel continues to grow strongly, consolidating the tourism sector as a key driver in economic development. As the third export sector in the world, tourism is essential for job creation and the prosperity of communities around the world." said UNWTO Secretary-General Zurab Pololikashvili. "Yet as we continue to grow we must work closer together to ensure this growth benefits every member of every host community and is in line with the Sustainable Development Goals.

BACKGROUND AND OBJECTIVES

The primary data sources for this report were the 2017 CIDOT Visitor Exit Surveys and administrative data from the Cayman Islands Immigration Department, Port Authority of the Cayman Islands and the Department of Tourism.

The research objectives of the Exit Survey were tailored to measure and track the overall experiences of stay-over visitors throughout the data collection period. The survey is designed to monitor the demographic profiles, travel experiences, intentions, motivations, and spending patterns of stay-over visitors.

Visitor Exit Survey objectives include the following:

- To obtain a snapshot of the targeted demographics;
- To determine the percentage of visitors travelling together (party size);
- To ascertain the key media influences that impacted the decision to travel to the Cayman Islands;
- To establish spending patterns and track overall visitor expenditures;
- To determine visitors' satisfaction levels associated with their experiences in the Cayman Islands;
- To explore visitors' perceptions of the Cayman Islands compared to other warm-weather destinations;
- To determine the likelihood of visitors' returning to the Cayman Islands;
- To better understand the factors that influenced all visitors to travel to the Cayman Islands;
- To obtain visitor contact information for direct marketing and promotional purposes.

The Immigration department provided data on actual stayover arrivals numbers and characteristics of each visitor from data collected on the Embarkation and Disembarkation (ED) card (age, residence, length of stay etc.).

Port Authority of the Cayman Islands provided data on actual cruise passenger arrivals and characteristics of passengers as presented on the manifest.

CIDOT VISITOR EXIT SURVEY METHODOLOGY

The Visitor Exit Survey was designed to provide the Department of Tourism with information to support its marketing strategies, government policy, tourism partners and potential investors to name a few.

The Exit Survey is the only detailed source of data on the international tourist market in the Cayman Islands. As it is not possible to interview every tourist leaving the country, a stratified random sample (by marketing region) is used, and the results are subsequently weighted up to the arrivals population received from the Cayman Islands Immigration Department in a given period. Data is collected using a computer-aided personal interviewing method where eligible respondents complete a structured questionnaire. In the Exit Survey, it is not possible to administer the questionnaire to all qualified visitors departing the destination.

To reduce response errors, automated systems were put in place to flag possible errors, enumerators and the research analyst also check responses before the final stage of data processing. Questionnaires are not rejected during data analysis; imputation methods are used for missing data. For most of the questions in the Exit Survey, the item non-response rate is zero. Analysis and presentation are done separately for stayover and cruise visitors.

The survey instrument (questionnaire) used for this program was designed by the Department of Tourism in consultation with external stakeholders. The questionnaire was redesigned in 2015.

Definitions and procedures follow recommendations from the World Tourism Organization (UNWTO) as highlighted in their International Recommendations for Tourism Statistics 2008 Compilation Guide.

The following methodology was administered in the collection of data on the Visitor Exit Surveys for the Cayman Islands:

- A 10-minute survey was conducted
- Face-to-face interviews at Owen Roberts International Airport or the Port Authority Docks;
- The option was also available for visitors to complete the survey online
- The survey had 103 Questions (some questions are skipped based on previous response)
- The survey was conducted from 1 January – 31 December 2017
- The Survey was administered throughout the month, every month of the calendar year.
- The program targeted two separate populations:

  International air visitors

  Cruise excursionists
- Due to the 'skip-pattern' design of the questions, the same questionnaire was used for both air and cruise visitors.
- The Survey data was weighted based on data from the Cayman Islands Immigration Department
- Quota sampling was used which is a non-random sampling method; in this case sampling errors were not estimated.

SAMPLE

2807 stayover visitors and 1200 cruise visitors

Eligibility:
Non-residents (Visitors)

Excluded:
Seasonal workers
Other short-term workers
Long-term workers
Crews on public modes of transport

DISTRIBUTION

Stayover visitor survey is proportionately distributed across marketing regions:

REGION	# of Completed Surveys
USA	2188
Northeast	768
Midwest	449
Southeast	388
Southwest	435
West Coast	148
EUROPE	214
CANADA	169
OTHER	236
TOTAL	**2807**

FORMULA

$$n=\frac{\dfrac{z^2 \times p(1-p)}{e^2}}{1+\left(\dfrac{z^2 \times p(1-p)}{e^2N}\right)}$$

N = Estimated population size
n = sample size
e = margin of error (degree of accuracy)
z = z-score
p = proportion

Visitor Expenditure

- Average Expenditure per person = total expenditure / total arrivals
- Average Expenditure per party = average expenditure per person X average spending party size
- Average Expenditure per party per night = average expenditure per party / average length of stay
- Average Expenditure per person per night = average expenditure per person / average length of stay

STAY IN TOUCH

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The Cayman Islands Department of Tourism extends thanks to the visitors of our beautiful islands as well as those who participated in our surveys at the various departure ports. Special appreciation is noted for the following departments: Cayman Islands Immigration Department, Port Authority of the Cayman Islands, the Economics & Statistics Office and the Cayman Islands Airport Authority.

We couldn't have done this without our colleagues at the Cayman Islands Department of Tourism, namely the Tourism Product Development team and the Research Unit Enumerators whose dedication to the collection of surveys and data was critical to the publishing of this report.

To access Cayman Islands tourism research and statistics, please visit the research section on the destination's website at **www.visitcaymanislands.com/statistics.**

For further information, please contact the Market Research Unit:

E-mail: **research@caymanislands.ky**
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Disclaimer
The Market Research Unit makes every effort to publish reports that are free of errors. However, with many complex records that are analyzed, we cannot guarantee that all reports are free of error. All errors that are detected are immediately corrected and the latest version of the report is always available by contacting research@caymanislands.ky.

APPENDIX

LIST OF TABLES

Definitions

Administrative data	Data is produced as a by-product of the administrative functions of a government agency (e.g. tax collection).
Accommodation	Overnight stay in any establishment where tourists are accommodated and are charged for such overnight stay and service connected.
Bed place	The number of persons who can stay overnight in the beds set up in the establishment, regardless of there being any extra beds that may be set up at a customer's request. The term "bed place" applies to a single bed, double beds being usually counted as two bed places if they are used to accommodate two persons.
Country of residence	The country of residence of an individual is determined according to the centre of predominant economic interest. If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country.
Cruise Passenger	A special kind of same-day visitor, who arrives in a cruise ship, generally stays under 24 hours.
Excursionist	A visitor who does not stay overnight.
Length of stay	The number of nights a visitor intends to stay.
Package	A mix of services acquired at the same time for a single payment.

Purpose of visit	The purpose in the absence of which the trip would not have taken place.
Seasonality	A temporal imbalance in the phenomenon of tourism, which may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and and other forms of transportation, employment, and admissions to attractions.
Ship call	Any port visited by a cruise ship and passengers disembarked.
Stayover visitor	A tourist (or overnight visitor), if his or her trip includes an overnight stay.
Tourist	A visitor is classified as a tourist (or overnight visitor), if his or her trip includes an overnight stay, or as a same-day visitor (or excursionist).
Tourism characteristic industry	Industries that typically produce products that are a significant share of tourism expenditure or where tourism expenditure on the product represents a significant share of the supply of the product in the economy.
Travel companion	A person or persons with whom you have coordinated travel arrangements.
Travel party size	Visitors travelling together on a trip and whose expenditures are pooled.
Visitor	"tourist visitor" means a person arriving in the Islands for a visit of not more than six months' duration otherwise than for a professional, financial trade or business purpose or for the purpose of seeking or engaging in employment;
Visitor expenditure	The amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.

Tables

Table 1: Total Visitor Arrival, 2000-2017

	Stayover Visitors	Cruise Passengers	TOTAL
2000	354,087	1,030,857	1,384,944
2001	334,002	1,214,757	1,548,759
2002	302,701	1,574,750	1,877,451
2003	293,414	1,818,979	2,112,393
2004	259,885	1,693,293	1,953,178
2005	167,760	1,798,999	1,966,759
2006	267,228	1,923,597	2,190,825
2007	291,476	1,715,666	2,007,142
2008	302,872	1,553,053	1,855,925
2009	271,948	1,520,372	1,792,320
2010	288,257	1,597,838	1,886,095
2011	309,087	1,401,495	1,710,582
2012	321,642	1,507,370	1,829,012
2013	345,380	1,375,872	1,721,252
2014	382,816	1,609,555	1,992,371
2015	385,378	1,716,812	2,102,190
2016	385,451	1,711,849	2,097,300
2017	418,403	1,728,444	2,146,847

Table 2: Stayover Arrivals by Country, 2013-2017

	2013	2014	2015	2016	2017
TOTAL	**345,380**	**382,816**	**385,378**	**385,451**	**418,403**
AFRICA	**677**	**631**	**787**	**807**	**815**
EAST AFRICA	**66**	**73**	**75**	**61**	**91**
Comoros	1	1		2	4
Djibouti		2			
Ethiopia	3	2		3	
Kenya	20	31	34	27	25
Malawi	5	3	3		3
Mauritius	5	10	11	6	20
Mozambique	2		2	7	1
Rwanda			2	1	1
Seychelles		2		1	
Tanzania	2	2	1	4	
Uganda	2	2		1	21
Zambia	6	2	1		
Zimbabwe	20	16	21	9	16
CENTRAL AFRICA	**4**	**14**	**9**	**3**	**15**
Angola	1	6	5	1	3
Cameroon	2	4		2	1
Chad		1	3		
Congo		3			
Gabon			1		11
Sao Tome and Principe	1				
NORTH AFRICA	**8**	**10**	**9**	**8**	**8**
Algeria	4		1	1	
Morocco	3	8	7	4	6
Sudan	1				
Tunisia		2	1	3	2
SOUTHERN AFRICA	**551**	**491**	**679**	**698**	**686**
Botswana	4	8	8	3	1
Lesotho	3	1	1		1
Namibia	2	2	2	12	3
South Africa	516	455	616	673	679
Swaziland	26	25	52	10	2
WEST AFRICA	**48**	**43**	**15**	**37**	**15**
Côte d'Ivoire		1	1	5	
Gambia	1	73	75	61	91
Ghana	10	8	6	4	3
Guinea		1			
Guinea-Bissau		1			
Liberia			2		
Mali			1	4	1
Mauritania	1	3	1	1	
Nigeria	29	13	4	14	10
Senegal	3	2		2	
Sierra Leone	2	2		6	
Togo	2	12		1	1
AMERICAS	**313,020**	**341,823**	**345,847**	**350,893**	**388,982**
CARIBBEAN	**18,163**	**23,382**	**24,257**	**20,590**	**15,471**
Anguilla	9	18	19	31	39
Antigua and Barbuda	76	49	77	126	40
Bahamas	926	871	793	1,070	1,225
Barbados	493	512	500	673	628
Bermuda	646	464	542	629	673
British Virgin Islands	82	77	80	114	379
Cuba	6,911	12,200	12,684	7,230	1,363
Dominica	17	19	15	30	17
Dominican Republic	214	189	156	184	205
Grenada	50	30	18	53	40
Guadeloupe	16		1	3	5
Haiti	41	147	73	157	144
Jamaica	7,667	7,844	8,484	9,167	9,393
Martinique	14			4	
Montserrat	9	5	11	5	16
Netherlands Antilles	2	3	2		1
Puerto Rico	50	43	31	47	54
Saint Kitts and Nevis	53	31	60	47	55
Saint Lucia	88	65	56	94	81
Saint Vincent and the Grenadines	52	41	51	69	42
Sint Maarten	42	7	5	24	89
Trinidad and Tobago	594	694	506	712	711
Turks and Caicos Islands	51	34	66	98	213

	2013	2014	2015	2016	2017
United States Virgin Islands	60	39	27	23	58
CENTRAL AMERICA	**3,039**	**2,909**	**3,011**	**4,007**	**4,547**
Belize	131	124	150	125	130
Costa Rica	79	202	203	198	207
Costa Rica	65	25	20	59	57
Guatemala	78	77	38	54	33
Honduras	1,759	1,517	1,682	2,666	3,099
Mexico	526	544	505	559	577
Nicaragua	136	179	161	160	199
Panama	262	237	247	182	243
Other countries of Central America	3	4	5	4	2
NORTH AMERICA	**289,062**	**312,868**	**316,059**	**323,846**	**365,714**
Canada	23,639	24,908	24,299	23,274	24,757
Greenland			1		2
Saint Pierre and Miquelon	2	1		1	
United States of America	265,421	287,959	291,759	300,571	340,955
SOUTH AMERICA	**2,756**	**2,664**	**2,520**	**2,450**	**3,250**
Argentina	806	794	675	711	935
Bolivia, Plurinational State of	6	15	14	42	42
Brazil	852	842	941	743	1,194
Chile	191	132	153	171	145
Colombia	287	258	146	169	245
Ecuador	50	62	44	49	93
Guyana	165	167	190	241	210
Paraguay	1	7	2	4	4
Peru	159	168	156	125	207
Suriname	31	20	13	20	13
Uruguay	37	17	33	29	36
Venezuela, Bolivarian Republic of	171	182	153	146	126

EAST ASIA AND THE PACIFIC	**2,831**	**2,734**	**3,236**	**3,211**	**2,808**
NORTHEAST ASIA	**683**	**699**	**756**	**751**	**772**
China	163	175	222	225	250
Hong Kong, China	66	74	128	134	147
Japan	362	348	334	326	305
Korea, Republic of	62	61	49	26	16
Macao, China					1
Mongolia			3	10	31
Taiwan Province of China	30	41	20	30	22
SOUTHEAST ASIA	**319**	**267**	**303**	**282**	**340**
Brunei Darussalam	1	3	6		4
Cambodia	1	1	4	5	1
Indonesia	20	12	11	13	12
Lao People's Democratic Republic			2	1	
Malaysia	31	48	39	26	25
Myanmar	1		1	1	1
Philippines	112	106	120	101	167
Singapore	133	80	100	103	102
Thailand	16	6	19	20	15
Viet Nam	4	11	1	12	13

	2013	2014	2015	2016	2017
AUSTRALASIA	**1,811**	**1,753**	**2,163**	**2,152**	**1,686**
Australia	1,485	1,420	1,772	1,653	1,303
New Zealand	326	333	391	499	499
MELANESIA	**4**	**4**	**6**	**18**	**3**
Fiji	2	1	4	12	3
New Caledonia	1			1	
Papua New Guinea	1	3			
Solomon Islands			2	2	
Vanuatu			75	3	
MICRONESIA	**6**	**7**	**4**	**3**	**5**
Christmas Island, Australia			1		
Cocos (Keeling) Islands	1	1	1	2	
Guam	2		1		4

	2013	2014	2015	2016	2017
Kiribati		2			1
Midway Islands		1			
Nauru	3		1	1	
Other countries of Micronesia		3			
POLYNESIA	**4**	**4**	**6**	**18**	**3**
American Samoa		1		1	1
French Polynesia				2	
Niue		1			
Samoa	4	1	2	2	1
Tokelau			1		
Tonga	3	1	1		
Tuvalu	1				
EUROPE	**28,104**	**36,750**	**34,598**	**29,543**	**24,494**
CENTRAL/ EASTERN EUROPE	**895**	**827**	**912**	**835**	**922**
Armenia	1	1		1	1
Azerbaijan	1	2	1	2	
Belarus	1	3	5	1	4
Bulgaria	52	40	40	40	35
Czech Republic	141	160	169	180	198
Estonia	10	16	26	19	38
Georgia	1	1	3	1	3
Hungary	109	127	144	128	132
Kazakhstan	1	8	6	1	1
Latvia	15	13	14	16	31
Lithuania	17	23	14	31	25
Moldova, Republic of	1			4	
Poland	185	173	250	181	203
Romania	73	74	62	56	49
Russian Federation	146	89	81	58	65
Slovakia	108	74	76	75	105
Ukraine	24	22	21	41	31
Uzbekistan	9	1			1

NORTHERN EUROPE	**15,399**	**16,232**	**17,287**	**17,531**	**16,423**
Denmark	191	210	246	273	280
Finland	135	141	147	176	150
Iceland	8	16	35	30	14
Ireland	978	1,159	1,320	1,221	1,242
Isle of Man			2		4
Norway	347	357	335	327	266
Sweden	467	598	484	585	450
United Kingdom	13,273	13,751	14,718	14,919	14,017
SOUTHERN EUROPE	**7,310**	**14,801**	**11,108**	**5,945**	**2,646**
Albania		1	6	2	
Andorra	57	89	54	52	36
Bosnia and Herzegovina	1	1			1
Croatia	5	6	10	9	15
Gibraltar	6	4	10	8	5
Greece	46	70	87	116	91
Holy See (Vatican)				1	1
Italy	1,501	2,152	1,935	1,924	1,492
Malta	8	29	19	7	10
Portugal	147	183	127	132	150
San Marino			1	1	
Serbia	25	13	9	10	23
Slovenia	21	28	23	13	29
Spain	5,492	12,224	8,825	3,668	790
The Former Yugoslav Republic of Macedonia	1	1	2	2	3
WESTERN EUROPE	**4,330**	**4,638**	**4,955**	**4,869**	**4,233**
Austria	251	263	301	337	325
Belgium	200	185	228	175	155
France	824	1,045	1,050	1,141	862
Germany	1,672	1,601	1,745	1,641	1,426
Liechtenstein	2			2	2
Luxembourg	10	23	38	29	57
Monaco	17	15	23	29	42
Netherlands	616	624	573	684	674
Switzerland	738	882	997	831	690

	2013	2014	2015	2016	2017
EAST MEDITERRANEAN EUROPE	**170**	**252**	**336**	**363**	**270**
Cyprus	13	15	16	20	14
Israel	113	194	278	298	217
Turkey	44	43	42	45	39
MIDDLE EAST	**141**	**196**	**241**	**266**	**255**
Bahrain	5	4	14	6	10
Egypt	8	6	6	11	11
Jordan	6	1	5	7	2
Kuwait	14	19	20	17	13
Lebanon	14	9	4	20	9
Oman	4	14	10	11	9
Qatar	21	35	43	32	21
Saudi Arabia	55	80	122	119	125
Syrian Arab Republic	1	4			
United Arab Emirates	13	24	17	43	55
SOUTH ASIA	**331**	**330**	**223**	**302**	**339**
Afghanistan	2			1	
Bangladesh		1			
Bhutan			1		
India	303	279	195	256	292
Iran, Islamic Republic of	2	4	3	3	1
Maldives	3				
Nepal	7	15	9	17	7
Pakistan	7	16	13	5	25
Sri Lanka	7	12	2	20	14
NOT SPECIFIED	**331**	**330**	**223**	**302**	**339**
Other countries of the World	276	352	446	429	710

Table 3: Monthly Stayover Arrivals by Country, 2017

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
TOTAL	31,634	35,547	44,056	38,927	29,342	38,729	45,642	31,388	16,845	22,291	34,999	49,003
AFRICA	**59**	**38**	**52**	**59**	**44**	**72**	**80**	**73**	**62**	**56**	**61**	**159**
EAST AFRICA	**7**	**5**	**1**	**8**	**3**	**14**	**14**	**3**	**8**	**9**	**10**	**9**
Comoros	–	–	–	1	1	1	–	–	1	–	–	–
Kenya	1	–	–	1	1	1	11	1	–	1	5	3
Malawi	2	–	–	–	–	1	–	–	–	–	–	–
Mauritius	2	1	–	1	1	5	3	1	1	–	3	2
Mozambique	–	–	–	–	–	–	–	–	–	–	–	1
Rwanda	–	–	–	–	–	–	–	–	–	–	1	–
Uganda	–	1	–	5	–	5	–	–	5	5	–	–
Zimbabwe	2	3	1	–	–	1	–	1	1	3	1	3
CENTRAL AFRICA	**–**	**–**	**–**	**–**	**–**	**6**	**11**	**–**	**–**	**–**	**–**	**3**
Angola	–	–	–	–	–	–	–	–	–	–	–	3
Cameroon	–	–	–	–	–	1	–	–	–	–	–	–
Gabon	–	–	–	–	–	–	11	–	–	–	–	–
NORTH AFRICA	**–**	**–**	**–**	**1**	**1**	**–**	**–**	**4**	**–**	**1**	**–**	**1**
Morocco	–	–	–	1	1	–	–	3	–	–	–	–
Tunisia	–	–	–	–	–	–	–	1	–	–	–	–
SOUTHERN AFRICA	**51**	**30**	**50**	**50**	**38**	**56**	**55**	**64**	**51**	**45**	**51**	**145**
Botswana	–	–	1	–	–	–	–	–	–	–	–	–
Lesotho	–	–	–	–	–	–	–	1	–	–	–	–
Namibia	–	2	–	–	–	–	1	–	–	–	–	–
South Africa	50	28	49	50	38	56	53	63	51	45	51	145
Swaziland	1	–	–	–	–	–	1	–	–	–	–	–
WEST AFRICA	**1**	**3**	**1**	**–**	**2**	**1**	**–**	**2**	**3**	**1**	**–**	**1**
Ghana	–	–	–	–	1	–	–	–	2	–	–	–
Mali	–	–	–	–	–	–	–	–	–	–	–	1
Nigeria	–	3	1	–	1	1	–	2	1	1	–	–
Togo	1	–	–	–	–	–	–	–	–	–	–	–
AMERICAS	29,060	32,902	41,698	36,022	27,177	36,881	42,978	28,800	15,121	20,178	32,521	45,644
CARIBBEAN	**973**	**689**	**762**	**1211**	**1189**	**1060**	**2768**	**1325**	**1059**	**880**	**1141**	**2414**
Anguilla	3	3	–	1	1	3	4	3	10	4	4	3
Antigua and Barbuda	11	–	–	2	5	4	2	1	–	6	5	4
Bahamas	179	63	79	95	103	82	83	93	201	67	103	77
Barbados	47	46	52	47	45	69	50	41	59	49	74	49
Bermuda	66	62	46	77	55	34	34	27	52	61	107	52
British Virgin Islands	17	16	6	18	7	4	4	3	164	76	43	21
Cuba	132	68	108	114	99	79	134	137	89	92	111	200
Dominica	–	2	1	–	3	1	5	1	3	1	–	–

Dominican Republic	5	6	10	7	13	8	8	8	20	8	3	109
Grenada	6	4	5	2	2	2	1	1	4	5	1	7
Guadeloupe	–	–	–	–	–	–	–	4	–	–	1	–
Haiti	22	1	9	–	21	21	24	7	3	–	18	18
Jamaica	361	346	378	676	662	650	2335	877	376	427	546	1760
Montserrat	1	1	–	3	1	6	1	–	1	1	–	1
Netherlands Antilles	–	–	–	–	–	–	–	–	–	–	–	–
Puerto Rico	2	4	7	7	2	3	2	7	4	2	10	4
Saint Kitts and Nevis	6	1	–	13	5	5	5	4	2	4	7	3
Saint Lucia	10	4	2	12	8	3	3	3	15	7	7	7
Saint Vincent and the Grenadines	3	1	3	4	6	5	1	5	4	2	4	4
Sint Maarten (Dutch part)	6	1	14	30	22	3	–	5	1	–	3	4
Trinidad and Tobago	37	45	33	67	113	35	56	77	39	51	74	84
Turks and Caicos Islands	38	10	7	33	15	39	16	12	9	12	17	5
United States Virgin Islands	21	5	2	3	–	4	–	9	4	5	3	2
CENTRAL AMERICA	**265**	**309**	**260**	**357**	**268**	**491**	**417**	**383**	**356**	**317**	**397**	**727**
Belize	9	6	12	21	9	13	8	15	12	5	5	15
Costa Rica	14	15	14	17	13	9	24	13	6	18	26	38
El Salvador	3	–	1	2	4	36	1	1	–	4	3	2
Guatemala	1	–	1	13	3	1	–	2	1	6	2	3
Honduras	195	208	168	198	180	309	258	281	287	236	289	490
Mexico	18	43	33	73	39	99	88	45	23	20	48	48
Nicaragua	12	10	8	11	7	6	11	8	8	8	8	102
Panama	12	22	22	22	13	18	27	18	19	20	16	29
Other countries of Central America	1	–	1	–	–	–	–	–	–	–	–	–
NORTH AMERICA	27,480	31,603	40,463	34,219	25,509	35,069	39,365	26,842	13,494	18,758	30,776	42,136
Canada	2955	3253	3517	2254	1487	840	1160	1003	813	1204	2456	3815
Greenland	–	–	–	–	2	–	–	–	–	–	–	–
United States of America	24,525	28,350	36,946	31,965	24,020	34,229	38,205	25,839	12,681	17,554	28,320	38,321
SOUTH AMERICA	**342**	**301**	**213**	**235**	**211**	**261**	**428**	**250**	**3**	**1**	**212**	**223**
Argentina	99	117	52	76	56	69	93	87	62	64	89	71
Bolivia, Plurinational State of	6	–	11	–	5	1	1	5	3	5	1	4
Brazil	166	100	87	65	75	96	225	79	59	73	48	121
Chile	12	7	3	9	15	15	17	11	32	10	7	7
Colombia	12	3	7	18	14	17	22	10	6	12	14	110
Ecuador	2	41	10	10	1	1	4	13	1	4	3	3
Guyana	22	15	15	13	19	5	31	14	8	18	25	25
Paraguay	–	–	2	–	–	–	2	–	–	–	–	–
Peru	14	7	16	34	9	30	20	12	21	21	9	14
Suriname	–	–	–	1	2	5	2	–	–	1	2	–
Uruguay	3	2	1	2	1	5	3	2	5	2	6	4
Venezuela, Bolivarian Republic of	6	9	9	7	14	17	8	17	15	13	3	8
EAST ASIA AND THE PACIFIC	**303**	**225**	**206**	**294**	**315**	**222**	**235**	**178**	**217**	**168**	**197**	**248**
NORTH-EAST ASIA	**79**	**60**	**59**	**93**	**97**	**58**	**43**	**52**	**62**	**42**	**76**	**51**
China	31	27	3	35	17	23	18	11	15	7	40	23
Hong Kong, China	17	15	4	16	24	17	9	4	14	13	9	5
Japan	20	18	40	30	50	15	15	35	26	12	25	19
Korea, Republic of	5	–	1	6	–	1	1	1	–	–	–	1
Macao, China	1	–	–	–	–	–	–	–	–	–	–	–
Macao, China												
Mongolia	–	–	10	5	–	–	–	–	5	10	1	–
Taiwan Province of China	5	–	1	1	6	2	–	1	2	–	1	3
SOUTH-EAST ASIA	**28**	**39**	**29**	**38**	**52**	**28**	**30**	**19**	**19**	**18**	**20**	**20**
Brunei Darussalam	1	1	1	–	–	–	–	1	–	–	–	–
Cambodia	–	–	–	–	1	–	–	–	–	–	–	–
Indonesia	–	–	1	3	2	–	–	–	1	1	1	3
Malaysia	–	4	–	4	4	6	2	2	–	1	1	1
Myanmar	1	–	–	–	–	–	–	–	–	–	–	–
Philippines	18	15	15	24	14	16	15	10	10	12	7	11
Singapore	4	19	7	7	23	6	7	5	7	4	8	5
Thailand	1	–	5	–	4	–	1	–	1	–	3	–
Viet Nam	3	–	–	–	4	–	5	1	–	–	–	–
AUSTRALASIA	**196**	**124**	**118**	**163**	**164**	**136**	**161**	**105**	**134**	**108**	**100**	**177**
Australia	155	94	91	124	120	110	116	88	109	78	80	138
New Zealand	41	30	27	39	44	26	45	17	25	30	20	39
MELANESIA	**–**	**1**	**–**	**–**	**–**	**–**	**–**	**–**	**2**	**–**	**–**	**–**
Fiji	–	1	–	–	–	–	–	–	2	–	–	–
MICRONESIA	**–**	**–**	**–**	**–**	**2**	**–**	**–**	**2**	**–**	**–**	**1**	**–**
Guam	–	–	–	–	2	–	–	1	–	–	–	–
Kiribati	–	–	–	–	–	–	–	1	–	–	–	–
POLYNESIA	**–**	**1**	**–**	**–**	**–**	**–**	**–**	**–**	**–**	**–**	**–**	**–**
American Samoa	–	1	–	–	–	–	–	–	–	–	–	–
Samoa	–	–	–	–	–	–	–	–	–	–	–	–
EUROPE	**2117**	**2320**	**2018**	**2473**	**1718**	**1428**	**2085**	**2193**	**1342**	**1801**	**2128**	**2871**
CENTRAL/ EASTERN EUROPE	**89**	**87**	**76**	**53**	**56**	**57**	**58**	**60**	**84**	**68**	**102**	**132**
Armenia	–	–	–	–	–	–	–	–	–	–	1	–
Belarus	–	–	1	–	–	–	1	–	–	–	–	2
Bulgaria	6	1	6	1	7	3	1	–	–	1	1	8

Czech Republic	16	12	20	15	7	11	12	8	34	13	30	20
Estonia	2	2	7	–	1	4	3	4	1	1	2	11
Georgia	–	–	–	1	1	–	–	–	–	–	1	–
Hungary	20	11	9	9	10	9	9	4	9	10	8	24
Kazakhstan	–	1	–	–	–	–	–	–	–	–	–	–
Latvia	4	2	–	–	5	2	1	1	–	6	2	8
Lithuania	–	1	–	2	3	2	–	1	7	5	1	3
Poland	10	45	13	10	9	9	20	23	14	9	19	22
Romania	16	1	7	5	2	4	5	–	–	–	4	5
Russian Federation	7	1	3	5	3	6	4	3	4	5	11	13
Slovakia	6	7	7	4	4	7	2	15	14	15	16	8
Ukraine	1	3	3	1	4	–	–	1	1	3	6	8
Uzbekistan	1	–	–	–	–	–	–	–	–	–	–	–
NORTHERN EUROPE	**1324**	**1590**	**1357**	**1670**	**1161**	**956**	**1408**	**1293**	**921**	**1296**	**1439**	**2008**
Denmark	42	43	21	15	10	11	38	18	10	20	37	15
Finland	15	21	20	11	7	14	6	1	6	9	16	24
Iceland	–	1	–	–	2	–	1	1	–	–	8	1
Ireland	113	135	76	120	103	95	96	68	67	83	95	191
Isle of Man	–	–	–	1	2	–	–	–	–	–	1	–
Norway	22	37	16	30	7	45	37	9	9	9	25	20
Sweden	74	40	41	24	21	15	26	19	20	23	69	78
United Kingdom	1,058	1,313	1,183	1,469	1,009	776	1,204	1,177	809	1,152	1,188	1,679
SOUTHERN EUROPE	**306**	**194**	**72**	**235**	**167**	**172**	**222**	**478**	**103**	**114**	**155**	**328**
Andorra	1	3	4	2	5	5	3	6	–	1	3	3
Bosnia and Herzegovina	1	–	–	–	–	–	–	–	–	–	–	–
Croatia	3	–	3	1	2	1	1	–	–	1	2	1
Gibraltar	–	–	–	–	–	–	–	–	–	2	3	–
Greece	12	11	2	7	3	10	4	6	6	9	6	15
Holy See	–	–	–	–	–	1	–	–	–	–	–	–
Italy	188	108	88	107	67	91	121	330	47	42	74	229
Malta	–	–	2	2	2	–	–	1	–	–	3	–
Portugal	4	18	11	26	12	4	12	21	15	11	10	6
Serbia	1	3	–	3	3	2	3	3	2	–	2	1
Slovenia	1	1	1	1	2	3	3	3	2	2	6	4
Spain	95	50	61	86	71	54	73	108	31	46	46	69
The Former Yugoslav Republic of Macedonia	–	–	–	–	–	1	2	–	–	–	–	–
WESTERN EUROPE	**370**	**427**	**397**	**486**	**314**	**223**	**387**	**337**	**204**	**298**	**410**	**380**
Austria	29	44	33	53	23	8	20	15	13	22	34	31
Belgium	10	6	12	16	10	12	24	9	11	19	8	18
France	96	95	97	70	56	46	76	110	26	50	58	82
Germany	122	159	142	155	102	60	131	103	98	118	143	93

Liechtenstein	–	–	–	–	2	–	–	–	–	–	–	–
Luxembourg	5	5	7	9	1	3	2	4	7	7	4	3
Monaco	–	12	2	5	3	3	4	4	–	1	5	3
Netherlands	50	58	49	75	82	45	70	52	24	39	78	52
Switzerland	58	48	55	103	35	46	60	40	25	42	80	98
EAST MEDITERRANEAN EUROPE	**28**	**22**	**16**	**29**	**20**	**20**	**10**	**25**	**30**	**25**	**22**	**23**
Cyprus	5	–	–	2	1	–	–	–	1	–	4	1
Israel	19	20	13	21	17	13	9	18	27	24	16	20
Turkey	4	2	3	6	2	7	1	7	2	1	2	2
MIDDLE EAST	**28**	**22**	**30**	**26**	**13**	**24**	**19**	**27**	**5**	**14**	**21**	**26**
Bahrain	1	-	-	4	-	1	1	-	-	-	1	2
Democratic Yemen (former)	-	-	-	-	-	-	-	-	-	-	-	-
Dubai	-	-	-	-	-	-	-	-	-	-	-	-
Egypt	1	-	-	-	-	1	3	-	-	1	-	5
Iraq	-	-	-	-	-	-	-	-	-	-	-	-
Jordan	-	-	-	2	-	-	-	-	-	-	-	-
Kuwait	-	-	-	-	1	-	7	3	-	-	2	-
Lebanon	1	-	2	-	-	2	-	1	-	2	1	-
Libya	-	-	-	-	-	-	-	-	-	-	-	-
Oman	-	-	1	1	-	-	3	2	-	-	2	-
Qatar	4	2	4	-	-	1	1	1	-	1	1	6
Saudi Arabia	18	13	19	11	9	9	2	16	2	5	11	10
State of Palestine	-	-	-	-	-	-	-	-	-	-	-	-
Syrian Arab Republic	-	-	-	-	-	-	-	-	-	-	-	-
United Arab Emirates	3	7	4	8	3	10	2	4	3	5	3	3
Yemen	-	-	-	-	-	-	-	-	-	-	-	-
Other countries of Middle East	–	–	–	–	–	–	–	–	–	–	–	–
All countries of Middle East	–	–	–	–	–	–	–	–	–	–	–	–
SOUTH ASIA	**28**	**19**	**23**	**20**	**32**	**31**	**57**	**35**	**24**	**28**	**27**	**15**
Afghanistan	-	-	-	-	-	-	-	-	-	-	-	-
Bangladesh	-	-	-	-	-	-	-	-	-	-	-	-
Bhutan	-	-	-	-	-	-	-	-	-	-	-	-
India	24	18	21	19	32	27	43	43	21	26	27	10
Iran, Islamic Republic of	-	-	-	-	-	1	-	-	-	-	-	-
Maldives	-	-	-	-	-	-	-	-	-	-	-	-
Nepal	-	-	-	-	-	-	2	2	2	-	-	1
Pakistan	4	-	-	1	-	3	11	11	-	-	-	-
Sri Lanka	-	1	2	-	-	-	1	1	1	2	-	4
India, Pakistan	-	-	-	-	-	-	-	-	-	-	-	-

Other countries of South Asia	–	–	–	–	–	–	–	–	–	–	–	–
All countries of South Asia	–	–	–	–	–	–	–	–	–	–	–	–
NOT SPECIFIED	**39**	**21**	**29**	**33**	**43**	**71**	**188**	**82**	**74**	**46**	**44**	**40**
Other countries of the World	39	21	29	33	43	71	188	82	74	46	44	40
Nationals Residing Abroad	–	–	–	–	–	–	–	–	–	–	–	–

Table 4: USA Stayover Visitor Arrival by Year 2013-2017

	2013	2014	2015	2016	2017
Texas	24,181	27,089	29,899	32,606	35,475
New York	22,436	28,022	29,004	30,397	34,119
Florida	18,992	19,938	20,130	22,718	31,211
New Jersey	11,903	13,985	13,752	14,176	16,611
Illinois	11,854	12,381	12,572	13,129	15,668
California	11,854	12,399	12,463	13,640	14,648
Pennsylvania	10,860	10,633	10,849	11,045	12,389
Massachusetts	8,494	9,191	10,088	10,082	12,205
Virginia	8,618	8,537	9,188	9,986	11,664
Ohio	7,485	8,129	7,687	8,282	9,878
Georgia	6,451	6,641	7,287	8,217	9,468
Michigan	7,229	7,201	7,440	8,164	9,333
North Carolina	6,569	6,919	7,282	7,738	9,181
Maryland	6,206	6,148	6,129	6,734	8,460
Colorado	5,390	5,439	6,057	6,193	7,505
Connecticut	5,792	6,126	6,670	7,077	7,463
Minnesota	6,048	6,267	5,835	6,306	6,235
Indiana	4,252	4,735	4,274	4,868	6,119
Missouri	4,435	4,444	4,314	4,494	5,508
Wisconsin	3,911	4,157	4,121	4,739	5,440
Tennessee	3,479	3,676	3,649	4,059	5,224
Oklahoma	2,286	2,313	2,661	2,545	3,312
Kansas	2,397	2,441	2,326	2,680	3,067
South Carolina	1,998	2,286	2,554	2,699	3,026
Iowa	1,946	2,219	2,088	2,252	2,913
Arizona	2,188	2,111	2,102	2,336	2,869
Louisiana	1,583	1,855	1,840	2,331	2,608
Kentucky	2,125	2,047	1,970	2,152	2,580
Washington	1,791	1,842	1,796	2,123	2,350
Alabama	1,670	1,496	1,786	1,987	2,342
Arkansas	1,308	1,127	1,337	1,653	1,909
New Hampshire	1,350	1,524	1,560	1,407	1,877
Utah	1,303	1,293	1,433	1,551	1,755
Washington, DC	1,063	1,234	1,280	1,260	1,627
Nebraska	1,135	1,361	1,229	1,338	1,487
Oregon	904	1,040	1,055	1,207	1,276
Rhode Island	714	804	823	714	1,077
Nevada	627	860	734	914	1,049
Maine	702	778	854	872	1,048
Mississippi	860	680	892	976	978
Delaware	767	742	785	760	897
New Mexico	506	535	562	674	819
South Dakota	576	570	615	718	770
Vermont	548	623	557	655	701
West Virginia	724	629	534	556	625
Idaho	295	379	359	430	571
North Dakota	371	351	424	417	524
Montana	298	382	426	451	456
Wyoming	297	277	384	345	419
Overseas Territories	267	290	216	285	274
Alaska	180	189	202	180	183
Hawaii	90	137	59	100	109
Unknown	36,113	41,487	37,626	27,353	21,653

Table 5: Canada Province Stayover Visitor Arrivals by Month, 2017

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Alberta	264	265	306	261	134	92	99	81	62	113	246	381
British Columbia	253	274	398	254	163	109	131	80	84	146	267	371
Manitoba	123	91	82	54	23	20	28	7	9	22	64	101
New Brunswick	16	73	71	46	11	7	6	3	16	10	34	44
Newfoundland and Labrador	26	13	16	29	21	9		10	6		12	18
Northwest Territories	6	3	3	3	1		1		21	11	2	5
Nova Scotia	60	73	72	85	32	13	20	2		34	49	66
Ontario	1,825	2,053	2,117	1,236	921	465	639	680	489	730	1,467	2,253
Prince Edward Island	7	12	18	17	4	2	1	2		5	9	18
Quebec	220	188	195	152	113	76	181	101	98	78	157	375
Saskatchewan	76	121	60	64	15	11	21	5	5	19	65	50
Yukon	4	1		3		1						1
Unknown	75	86	179	50	49	35	33	32	23	36	84	132

Table 6: Canada Province Stayover Visitor Arrivals by Year, 2013-2017

	2013	2014	2015	2016	2017
Alberta	2,415	2,543	2,428	2,118	2,304
British Columbia	2,265	2,274	2,288	2,274	2,530
Manitoba	780	712	652	627	624
New Brunswick	400	367	328	321	337
Newfoundland and Labrador	119	143	147	146	171
Northwest Territories	47	21	15	20	24
Nova Scotia	391	425	440	508	527
Ontario	13,357	14,229	14,002	13,882	14,875
Prince Edward Island	85	90	93	82	95
Quebec	1,861	1,889	2,080	1,771	1,934
Saskatchewan	562	647	613	499	512
Yukon	19	32	14	9	10
Unknown	1,338	1,536	1,199	1,017	814

Table 7: USA Stayover Visitor Arrivals by Month, 2013-2017

	2013	2014	2015	2016	2017
January	22,211	23,278	25,207	25,156	24,525
February	24,249	25,408	27,158	27,136	28,350
March	35,084	35,276	36,543	37,092	36,946
April	22,723	26,824	27,887	27,371	31,965
May	21,783	24,069	23,031	23,022	24,020
June	26,721	28,164	26,634	28,800	34,229
July	26,869	30,501	28,727	33,494	38,205
August	18,291	22,517	21,104	21,455	25,839
September	7,103	8,364	10,169	10,568	12,681
October	11,048	12,915	14,045	14,030	17,554
November	21,236	21,791	22,335	22,374	28,320
December	28,103	28,852	28,919	30,073	38,321

Table 8: UK and Ireland Stayover Visitor Arrivals by Month, 2013-2017

	2013	2014	2015	2016	2017
January	1,186	1,226	1,199	1,282	1,171
February	1,374	1,411	1,506	1,675	1,448
March	1,639	1,486	1,541	1,889	1,259
April	1,364	1,644	1,477	1,286	1,589
May	1,071	1,219	1,192	1,064	1,112
June	849	804	974	993	871
July	1,102	1,145	1,465	1,388	1,300
August	927	1,157	1,298	1,435	1,245
September	582	620	799	815	876
October	969	1,059	1,143	1,122	1,235
November	1,392	1,325	1,395	1,274	1,283
December	1,796	1,814	2,049	1,917	1,870

Table 10: Latin America Stayover Visitor Arrivals by Month, 2013-2017

	2013	2014	2015	2016	2017
January	459	589	492	476	576
February	467	299	376	369	589
March	414	302	376	382	446
April	399	530	395	467	557
May	350	515	395	420	449
June	497	386	473	502	729
July	503	380	529	649	804
August	417	456	355	398	604
September	296	300	335	424	548
October	356	348	376	470	516
November	448	440	405	526	572
December	862	717	671	988	1,054

Table 9: Canada Stayover Visitor Arrivals by Month, 2013-2017

	2013	2014	2015	2016	2017
January	2,810	3,131	3,132	2,990	2,955
February	3,013	3,615	3,536	3,209	3,253
March	3,452	3,589	3,456	3,146	3,517
April	2,218	2,314	2,633	2,322	2,254
May	1,408	1,525	1,495	1,487	1,487
June	1,045	934	774	922	840
July	988	1,024	958	1,154	1,160
August	1,075	1,208	1,156	988	1,003
September	662	658	648	653	813
October	1,125	1,149	1,231	1,183	1,204
November	2,359	2,462	2,178	2,111	2,456
December	3,484	3,299	3,102	3,109	3,815

Table 11: Continental Europe Stayover Visitor Arrivals by Month, 2013-2017

	2013	2014	2015	2016	2017
January	975	1,509	2,182	1,520	920
February	1,408	1,648	1,537	1,159	851
March	1,075	1,722	1,658	941	746
April	1,019	1,953	1,609	1,147	859
May	851	1,702	1,151	756	585
June	885	1,733	1,268	874	544
July	1,295	1,875	1,490	1,293	776
August	1,443	2,522	1,683	1,513	930
September	695	1,274	1,012	614	438
October	1,033	1,443	1,325	784	542
November	1,385	1,843	1,607	1,271	823
December	1,650	2,394	1,732	1,209	980

Table 12: US Stayover Visitors Age Distribution, 2013-2017

	2013	2014	2015	2016	2017
0-18	42,484	47,264	48,017	50,612	58,725
19-35	51,153	56,568	56,667	55,403	63,314
36-49	68,587	72,806	72,284	74,021	84,664
50-60	61,848	65,888	66,255	69,433	76,565
Over 60	41,349	45,433	48,536	51,102	57,687

Table 13: Canada Stayover Visitors Age Distribution, 2013-2017

	2013	2014	2015	2016	2017
0-18	3,471	3,670	3,517	3,402	3,571
19-35	4,762	4,941	4,798	4,646	4,580
36-49	6,005	6,338	5,935	5,420	5,773
50-60	5,406	5,515	5,559	5,321	5,949
Over 60	3,995	4,444	4,490	4,485	4,884

Table 14: UK and Ireland Stayover Visitors Age Distribution, 2013-2017

	2013	2014	2015	2016	2017
0-18	1,449	1,505	1,657	1,891	1,761
19-35	3,246	3,301	3,744	3,553	3,382
36-49	3,429	3,412	3,617	3,614	3,488
50-60	2,958	3,043	3,286	3,234	3,130
Over 60	3,169	3,649	3,734	3,848	3,498

Table 15: Continental Europe Stayover Visitors Age Distribution, 2013-2017

	2013	2014	2015	2016	2017
0-18	1,173	1,714	1,545	1,183	902
19-35	2,854	4,268	4,156	3,458	2,579
36-49	4,595	6,514	5,036	3,429	2,503
50-60	2,908	5,207	4,282	2,930	1,748
Over 60	2,184	3,915	3,235	2,081	1,262

Table 16: Latin America Stayover Visitors Age Distribution, 2013-2017

	2013	2014	2015	2016	2017
0-18	1,042	885	804	896	1,185
19-35	1,698	1,529	1,562	1,873	2,149
36-49	1,378	1,401	1,315	1,677	2,040
50-60	756	800	833	895	1,074
Over 60	594	647	664	730	996

Table 17: Rating of Stayover Visitor Experiences, 2017

	Very Good	Good	Fair	Poor	Very Poor
Overall experience	92%	7%	1%	0%	0%
Value for money	49%	31%	16%	3%	1%
Accommodations	77%	20%	2%	1%	0%
Attractions	89%	10%	1%	0%	0%
Beaches	91%	8%	1%	0%	0%
Customer service	87%	12%	1%	0%	0%
Restaurants	78%	20%	2%	0%	0%
Shopping	61%	33%	6%	0%	0%
Tours	84%	15%	1%	0%	0%
Transportation	57%	37%	6%	1%	0%
Underwater experience	93%	6%	1%	0%	0%
Water sports	89%	11%	0%	0%	0%

Table 19: Cruise Ship Calls by Month, 2013-2017

	2013	2014	2015	2016	2017
January	82	69	78	77	70
February	59	67	57	69	71
March	53	67	72	78	68
April	44	46	57	50	41
May	24	32	27	29	27
June	17	26	26	33	25
July	19	34	32	31	27
August	19	30	27	31	26
September	20	28	26	27	31
October	30	37	32	27	34
November	46	49	55	55	71
December	68	76	84	68	78
TOTAL	**481**	**561**	**573**	**575**	**569**

Table 18: Rating of Cruise Visitor Experiences, 2017

	Very Good	Good	Fair	Poor	Very Poor
Overall experience	92%	7%	1%	0%	0%
Value for money	83%	14%	2%	1%	0%
Attractions	96%	4%	0%	0%	0%
Beaches	91%	7%	2%	1%	0%
Customer service	94%	6%	0%	1%	0%
Restaurants	60%	37%	3%	0%	0%
Shopping	73%	27%	1%	0%	0%
Tours	89%	10%	0%	0%	0%
Transportation	62%	37%	1%	0%	0%
Underwater experience	87%	13%	0%	0%	0%
Water sports	98%	2%	0%	0%	0%

Table 20: Cruise Passenger Arrivals by Month, 2013-2017

	2013	2014	2015	2016	2017
January	215,890	188,504	202,264	196,208	181,765
February	160,844	169,346	142,564	176,539	189,704
March	155,529	185,167	199,245	237,339	199,844
April	123,422	134,646	175,225	144,805	125,284
May	76,264	97,317	95,072	96,430	94,523
June	61,027	86,537	94,511	121,984	90,809
July	66,874	120,126	115,192	108,447	101,513
August	67,571	105,936	100,091	108,211	96,309
September	58,976	87,536	86,833	90,273	103,287
October	84,529	111,951	100,874	81,311	115,077
November	118,360	127,212	160,967	156,790	208,695
December	186,586	195,277	243,974	193,512	221,634
TOTAL	**1,375,872**	**1,609,555**	**1,716,812**	**1,711,849**	**1,728,444**

Table 21: Distribution of Cruise Passenger Arrivals by Major Cruise Line and Cruise Ship, 2017

CRUISE COMPANY	CRUISE LINE	VESSEL NAME	CALLS	PASSENGERS
CARNIVAL CORPORATION & PLC	AIDA Cruises	Aida Cruises	4	8,540
		Aidaluna	9	18,224
		Aidamar	8	17,620
	Carnival Cruise Line	Carnival Breeze	21	94,714
		Carnival Conquest	15	51,016
		Carnival Dream	23	100,933
		Carnival Freedom	19	65,269
		Carnival Glory	29	95,763
		Carnival Glory	29	95,763
		Carnival Magic	1	4,041
		Carnival Paradise	22	52,331
		Carnival Pride	5	11,186
		Carnival Sensation	21	52,718
		Carnival Splendor	17	55,213
		Carnival Vista	25	116,784
	Carnival UK	Azura	2	6,155
		Queen Victoria	1	1,849
	Costa Cruises	Costa Deliziosa	8	19,221
	Holland America Line	Eurodam	8	16,571
		Koningsdam	4	10,763
		Oosterdam	5	9,074
		Rotterdam VI	4	4,735
		Westerdam	2	4,049
		Zuiderdam	1	1,753
		Nieuw Amsterdam	6	12,724
	Princess Cruises	Caribbean Princess	5	14,963
		Coral Princess	4	8,007
		Island Princess	4	8,639
		Regal Princess	8	28,604
DISNEY CRUISE LINE	Disney	Disney Fantasy	28	106,040
		Disney Magic	7	18,542
		Disney Wonder	3	7,020
MSC CRUISES	MSC Cruises	MSC Divina	29	108,864
		MSC Opera	34	72,706
		MSC Armonia	5	8,974
NORWEGIAN CRUISE LINE HOLDINGS LTD.	Norwegian Cruise Line	Norwegian Breakaway	1	3,615
		Norwegian Dawn	1	2,564
		Norwegian Epic	11	49,084
		Norwegian Escape	8	36,954
		Norwegian Jade	4	9,680
		Norwegian Pearl	7	18,149
	Oceania Cruises	Ms Marina	1	966
		Oceania	3	3,143
		Regatta	1	652
		Riviera	1	1,149
		Seven Seas Explorer	1	721
		Seven Seas Mariner	2	1,321
		Seven Seas Navigator	4	1,879
ROYAL CARIBBEAN CRUISES LTD.	Celebrity Cruises	Celebrity Eclipse	1	2,962
		Celebrity Equinox	21	58,039
		Celebrity Infinity	1	2,088
		Celebrity Reflection	11	34,219

		Celebrity Silhouette	8	22,299
		Celebrity Summit	2	3,884
	Pullmantur	Monarch	17	43,029
		Pullmantur	5	12,833
	Royal Caribbean	Brilliance of the Seas	10	23,267
		Empress of the Seas	1	1,836
		Freedom of the Seas	12	51,583
		Liberty of the Seas	23	99,204
		Rhapsody of the Seas	2	4,700
		Vision of the Seas	1	1,947
	TUI Cruises	Marella Discovery 2	3	5,531
		Thomson Dream	5	7,413
OTHER CRUISE LINES	Other Cruise	Other Ships	14	10,128
GRAND TOTAL			569	1,728,444

Table 22: USA Stayover Visitor Arrival by State and Month, 2017

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL
Texas	1,119	1,097	3,478	1,509	3,315	6,779	7,334	3,235	1,021	1,435	2,257	2,896	35,475
New York	2,916	3,771	3,012	3,640	2,063	2,212	3,192	3,994	1,132	1,505	2,540	4,142	34,119
Florida	1,624	1,551	2,160	2,183	2,670	4,015	4,106	3,033	2,399	2,178	2,676	2,616	31,211
New Jersey	1,294	1,203	1,268	2,205	1,041	1,102	1,983	1,847	488	561	1,757	1,862	16,611
Illinois	1,521	1,502	2,859	1,173	753	1,099	1,341	667	305	669	1,305	2,474	15,668
California	820	744	1,123	1,539	1,319	1,896	1,919	1,206	441	780	1,145	1,716	14,648
Pennsylvania	1,033	1,230	1,321	1,322	733	1,070	1,322	895	389	527	1,126	1,421	12,389
Massachusetts	961	1,750	1,684	1,578	737	759	667	681	258	502	1,077	1,551	12,205
Virginia	822	811	1,066	1,594	792	1,005	1,251	1,070	350	637	824	1,442	11,664
Ohio	754	905	1,291	777	563	915	882	511	405	576	1,014	1,285	9,878
Georgia	521	624	723	851	821	1,108	1,211	507	627	617	865	993	9,468
Michigan	917	1,418	1,672	1,330	456	352	407	283	177	344	680	1,297	9,333
North Carolina	600	672	831	1,152	645	862	943	674	434	542	783	1,043	9,181
Maryland	615	512	599	866	474	769	908	987	319	467	788	1,156	8,460
Colorado	444	399	995	605	747	791	766	397	234	577	694	856	7,505
Connecticut	584	970	845	1,101	408	514	559	598	148	244	559	933	7,463
Minnesota	831	913	1,627	497	210	239	162	154	96	292	519	695	6,235
Indiana	541	608	893	531	277	576	506	222	211	537	465	752	6,119
Missouri	411	433	727	302	397	560	762	356	198	295	475	592	5,508
Wisconsin	664	709	1,010	806	217	249	164	178	100	290	494	559	5,440
Tennessee	368	295	680	244	406	594	606	265	331	435	345	655	5,224
Oklahoma	173	163	284	159	368	485	664	218	132	157	203	306	3,312
Kansas	293	264	379	156	261	279	321	165	85	148	358	358	3,067
South Carolina	242	222	235	321	199	309	383	179	135	210	271	320	3,026
Iowa	375	346	575	200	103	149	117	93	76	116	408	355	2,913
Arizona	131	201	172	242	311	387	350	164	173	206	222	310	2,869
Louisiana	115	213	134	165	257	474	457	155	125	151	210	152	2,608
Kentucky	201	533	182	240	112	277	291	120	102	171	138	213	2,580
Washington	151	227	173	311	196	199	162	130	84	168	247	302	2,350
Alabama	176	147	278	156	223	365	246	148	96	123	224	160	2,342
Arkansas	118	115	269	168	124	249	247	135	91	93	130	170	1,909
New Hampshire	141	388	212	314	134	71	71	62	53	79	211	141	1,877
Utah	114	120	153	316	105	130	141	111	89	133	147	196	1,755
Washington, DC	165	89	146	184	98	123	124	192	44	69	110	283	1,627
Nebraska	137	145	188	108	106	197	97	56	49	62	145	197	1,487
Oregon	120	98	130	143	144	98	106	57	31	54	112	183	1,276
Rhode Island	175	104	160	100	41	53	63	78	32	39	113	119	1,077
Nevada	39	68	76	128	58	123	114	66	66	60	114	137	1,049
Maine	108	188	161	178	43	35	23	20	17	59	102	114	1,048
Mississippi	88	46	78	81	114	89	190	31	44	90	51	76	978
Delaware	62	121	97	122	47	69	90	30	17	34	102	106	897
New Mexico	29	41	89	53	87	111	118	67	33	52	50	89	819
South Dakota	113	99	105	51	26	26	63	8	28	28	121	102	770
Vermont	77	159	110	118	27	30	25	15	11	23	53	53	701
West Virginia	33	49	29	71	56	92	116	46	21	20	45	47	625
Idaho	52	58	86	86	25	42	39	12	17	18	91	45	571
North Dakota	66	112	125	25	27	20	8	4	4	11	48	74	524
Montana	25	53	99	81	32	20	9	18	15	17	37	50	456
Wyoming	40	37	106	35	16	21	17	9	8	6	98	26	419
Alaska	19	23	27	26	18	2	2	5	4	14	18	25	183
Overseas Territories	36	33	26	50	40	38	41	30	17	26	29	17	383
Unknown	1551	1771	2198	1772	1578	2200	2519	1655	919	1107	1724	2659	21,653


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