



CAYMAN ISLANDS
GRAND CAYMAN | CAYMAN BRAC | LITTLE CAYMAN

*Destination Performance
Bi-Annual Report 2022*

JANUARY - JUNE 2022

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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.

AGE, AVERAGE The age is obtained by summing all ages or variables and then dividing by the number of visitors.

AGE, MEDIAN The age that divides the visitation into two parts of equal size, that is, there are as many persons with ages above the median as there are with ages below the median.

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.
LENGTH OF STAY	The number of nights a visitor intends to stay.
PURPOSE OF VISIT	The purpose in the absence of which the trip would not have taken place.
SHIP CALL	Any port visited by a cruise ship and passengers disembarked.
STAY-OVER 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).
TRAVEL PARTY SIZE	Visitors travelling together on a trip and whose expenditures are pooled.
VISITOR	“Tourist visitor” means a person arriving in the Cayman 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.





BI-ANNUAL REPORT 2022

Introduction

COVID-19 changed many aspects of our lives, including how we analyse and interpret data. Throughout the pandemic, the Cayman Islands Department of Tourism (CIDOT) continued to gather insight to ensure the best quality of data and statistics were available to guide all stakeholders in decision making. CIDOT provides access to a wealth of impartial data and statistics in the spirit of promoting fact-based planning.

The first six months of 2022 demonstrated the Cayman Islands competency to shift from reopening to recovery. Phase Five of the reopening plan went into effect on 20 January 2022, allowing children to travel according to the vaccination status of their parents. On 17 February 2022, post-arrival testing protocols were discontinued. By 12 June the CDC dropped the pre-arrival test requirement for travelers returning to the U.S.

Dates for major milestones in the Cayman Islands Phased Reopening plan are referenced within the report to provide a chronicled path to reopening the Cayman Islands Tourism industry. Additionally, this report covers all areas of tourism in the Cayman Islands from stay-over to cruise visitors and the relevant characteristics of each segment.

The statistics presented are a summary of the Cayman Islands tourism performance. Readers are encouraged to visit visitcaymanislands.com/statistics or contact research@caymanislands.ky for more insights.



CAYMAN ISLANDS VISITATION (JAN-JUN 2022)

STAY-OVER VISITATION

STAY-OVER VISITORS

-59.3%

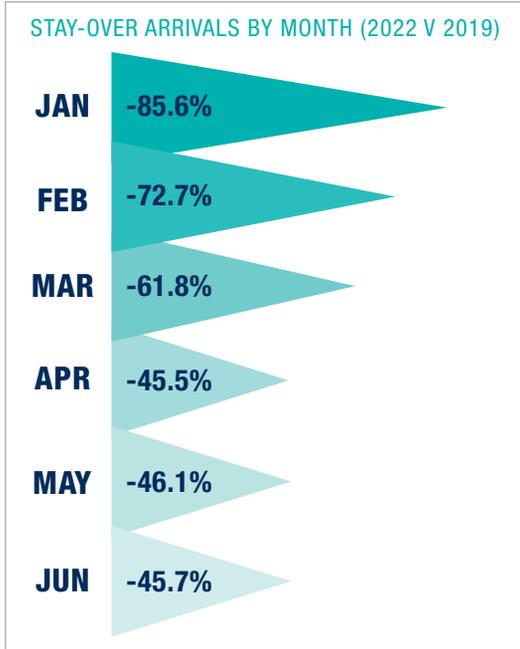
114,201

% CHANGE FOR 2022 VS 2019

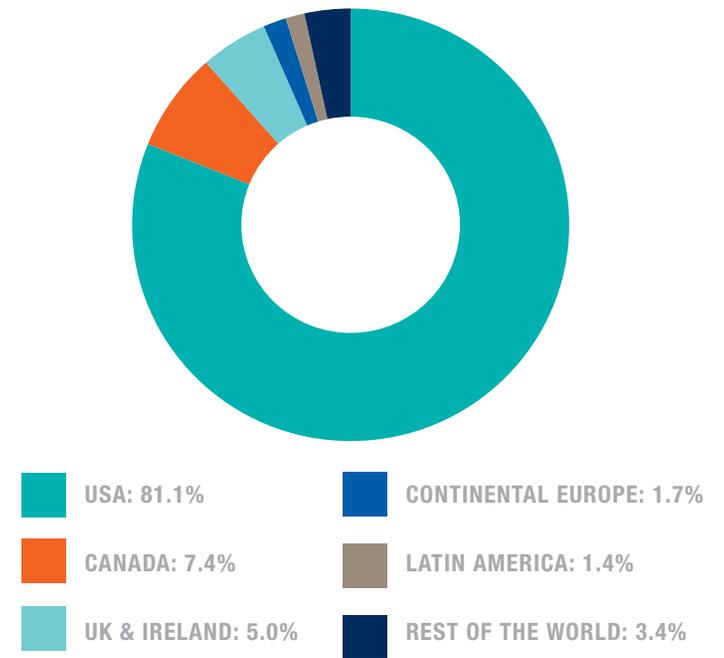
AVERAGE LENGTH OF STAY

6.2 NIGHTS

0.2 NIGHTS HIGHER THAN 2019



SHARE OF STAY-OVER VISITATION BY REGION



52% FEMALE

AVERAGE AGE 42.9

1.2 YRS OLDER THAN 2019

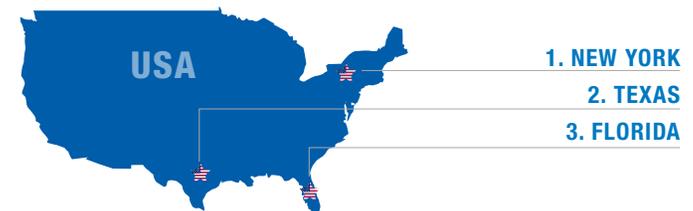
MEDIAN AGE 45

1 YR OLDER THAN 2019

48.1% REPEAT VISITORS

3.5 PERCENTAGE POINTS HIGHER THAN 2019

TOP STATES



Source: Cayman Islands Customs & Border Control, Port Authority of the Cayman Islands, Cayman Islands Department of Tourism

CRUISE VISITATION

-78.9%



% CHANGE
FOR
2022 VS 2019

**CRUISE
VISITORS**

212,997



JAN

-100%

FEB

-100%

MAR

-90%

APR

-71%

MAY

-44%

JUN

-14%

**CRUISE PASSENGER
ARRIVALS BY MONTH
(2022 VS 2019)**

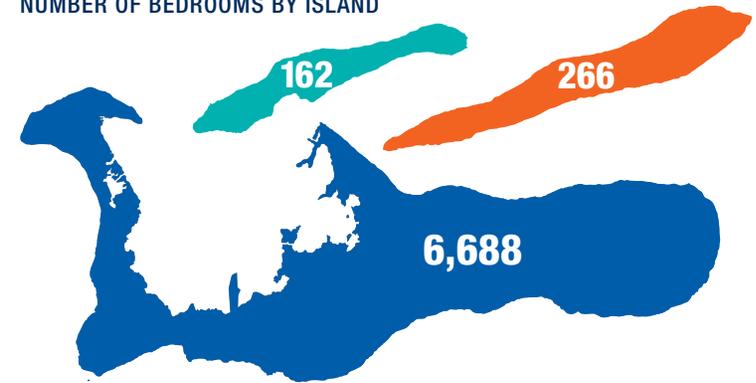
ACCOMMODATION STATISTICS



**# OF BEDS
10,131**



NUMBER OF BEDROOMS BY ISLAND



NUMBER OF BEDROOMS BY CATEGORY



CRUISE PASSENGER ARRIVALS BY CRUISE CORPORATION – % SHARE

**CARNIVAL
CORPORATION**

54%

**ROYAL
CARIBBEAN**

27%

**DISNEY
CRUISE
LINE**

11%

**MSC
CRUISES**

8%

Source: Cayman Islands Customs & Border Control, Port Authority of the Cayman Islands, Cayman Islands Department of Tourism

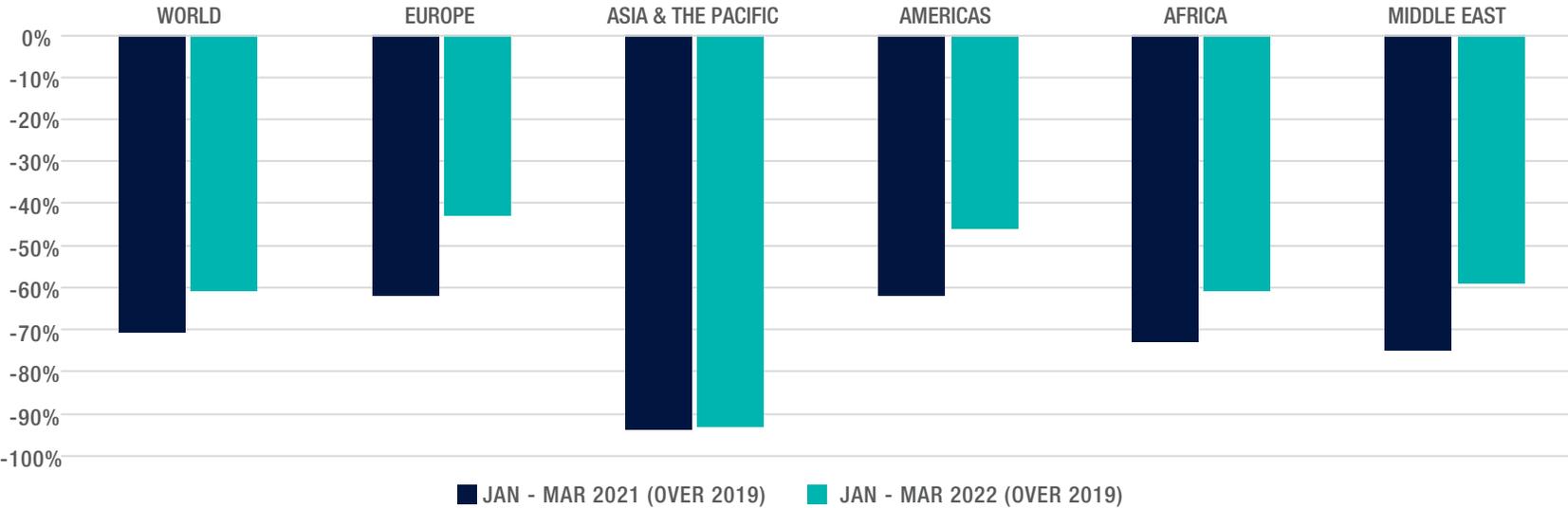
GLOBAL Overview¹

WORLD TOURISM TRENDS

According to the World Tourism Organisation (UNWTO), international tourist arrivals (stay-over visitors) in the first quarter of 2022 was 117 million persons; this was 182% higher than in 2021. Despite the rebound (from the COVID-19 pandemic) in 2022, international arrivals was 61% lower than in the first quarter of 2019. As countries eased travel restrictions related to COVID-19 and Omicron-related disruptions decreased, international arrivals improved from -66% in January 2022 (over 2019) to -60% in February and -56% in March.

By region, Europe (+280%) welcomed almost four times as many international arrivals as in Q1 2021, while in the Americas (+117%), arrivals more than doubled. However, arrivals were still 43% and 46% below 2019 levels, respectively. By subregion, the Caribbean (-26%) and Southern and Mediterranean Europe (-27%) showed the fastest recovery towards 2019 levels, with international tourism recovering to more than 70% of pre-crisis levels.

FIGURE 1
INTERNATIONAL TOURISM ARRIVALS BY REGION, JAN-MAR 2021 AND 2022 (CHANGE OVER 2019)



Source: ¹<https://www.unwto.org/global/press-release/2019-05-21/international-tourism-numbers-and-confidence-rise>



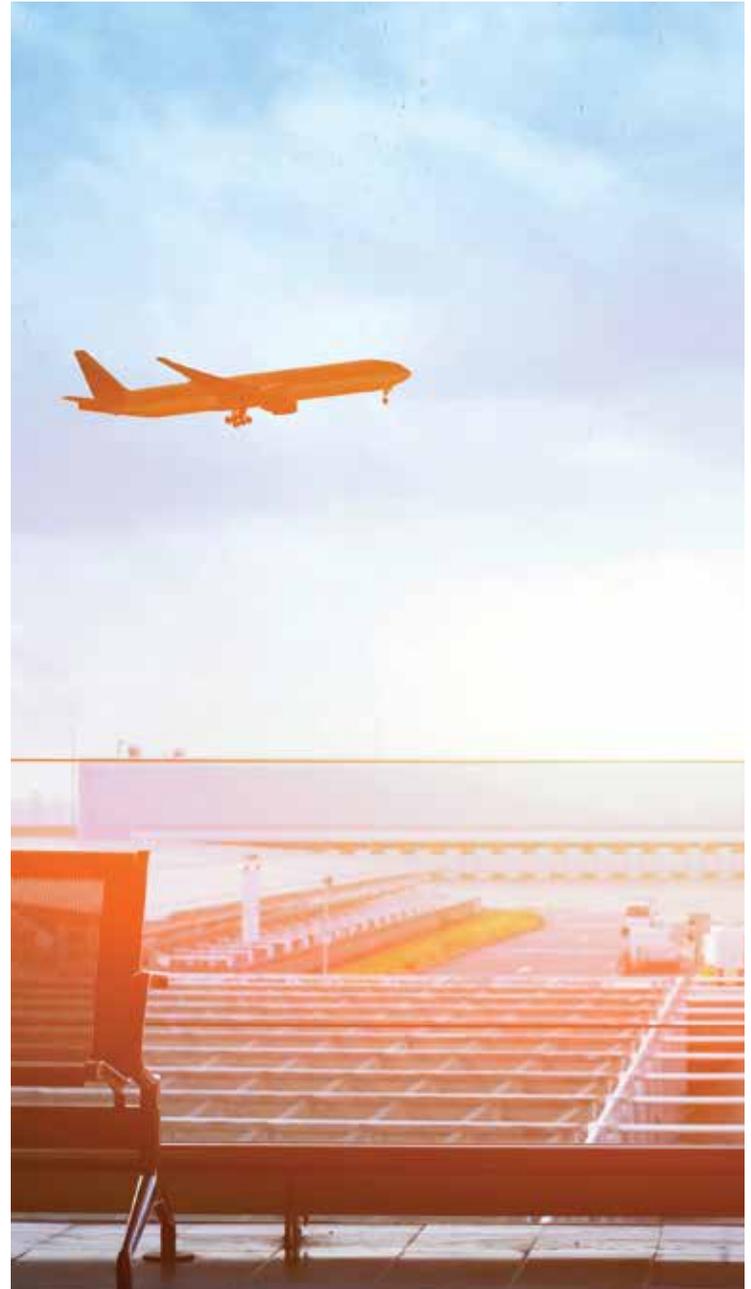
Based on international travel in the first quarter of the year, UNWTO revised the outlook for 2022, with international arrivals now expected to reach between 55% to 70% of 2019 levels.

International airlift capacity worldwide fell by 44% in January-April 2022 over 2019 levels. International connectivity (measured in capacity) across Europe, the Americas and North Atlantic has reached at least 80% of pre-crisis levels as of May 2022 (IATA).

Data from ForwardKeys as reported by UNWTO shows a 45% drop in international air bookings made between 1 January and 30 April 2022 (versus 2019) for any future travel. The Caribbean showed encouraging signs of recovery, according to air booking data, with global bookings being 23% below the same period in 2019.

According to STR as reported by UNWTO, global hotel occupancy reached 58% in April 2022, which was about the same level recorded in January 2020.

According to Caribbean Tourism Organisation (CTO), all Caribbean destinations reporting international arrival data for 2022 recorded growth when compared to 2021. Overall, the US, Canadian and European markets each recorded growth from all reporting destinations so far in 2022.



Source: <https://www.unwto.org/global/press-release/2019-05-21/international-tourism-numbers-and-confidence-rise>

CAYMAN ISLANDS

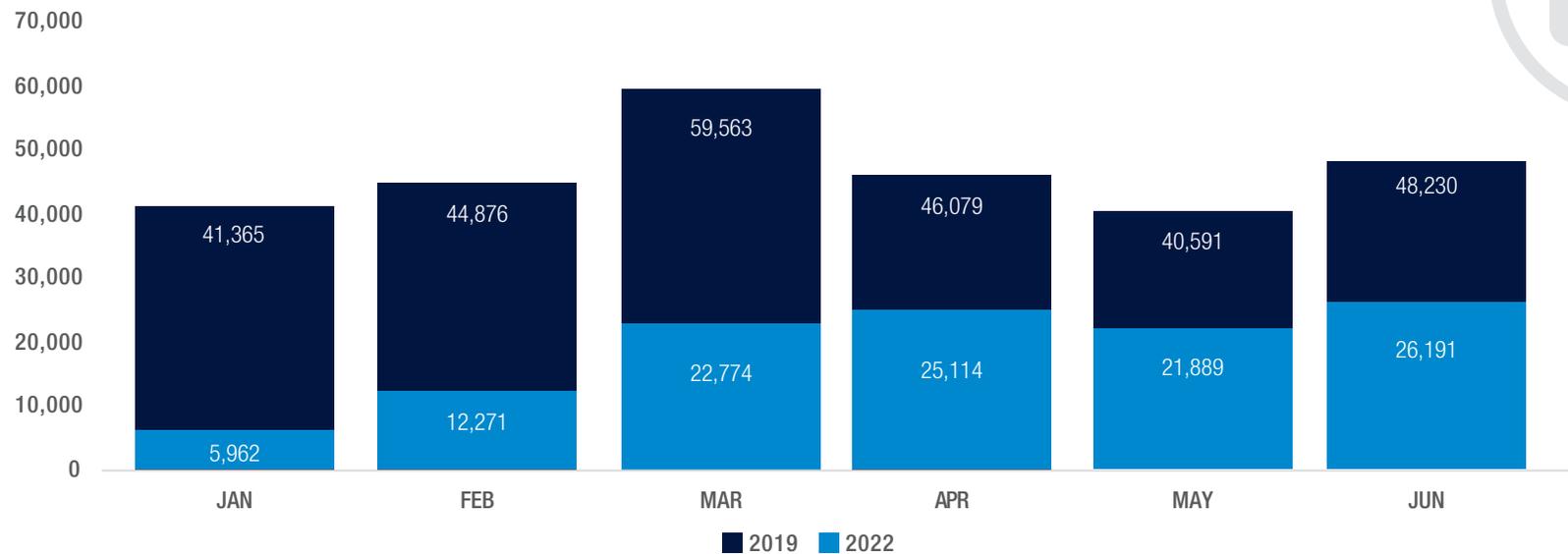
Stay-over Visitation

STAY-OVER VISITOR ARRIVALS

The Cayman Islands welcomed 114,201 stay-over visitors in the first six months of 2022. Visitation over this period was 59.3% below the visitation recorded over the same period in 2019. There has been a gradual increase in tourist arrivals since border restrictions were first eased in November 2021 and further eased in January 2022.

In June 2022, visitation peaked with 26,191 stay-over visitors.

FIGURE 2
STAY-OVER ARRIVALS BY MONTH, JAN-JUN (2019 VS 2022)



STAY-OVER VISITATION (JAN-JUN 2022)

114,201 Persons – 59.3% fewer than 2019

Source: Cayman Islands Customs & Border Control

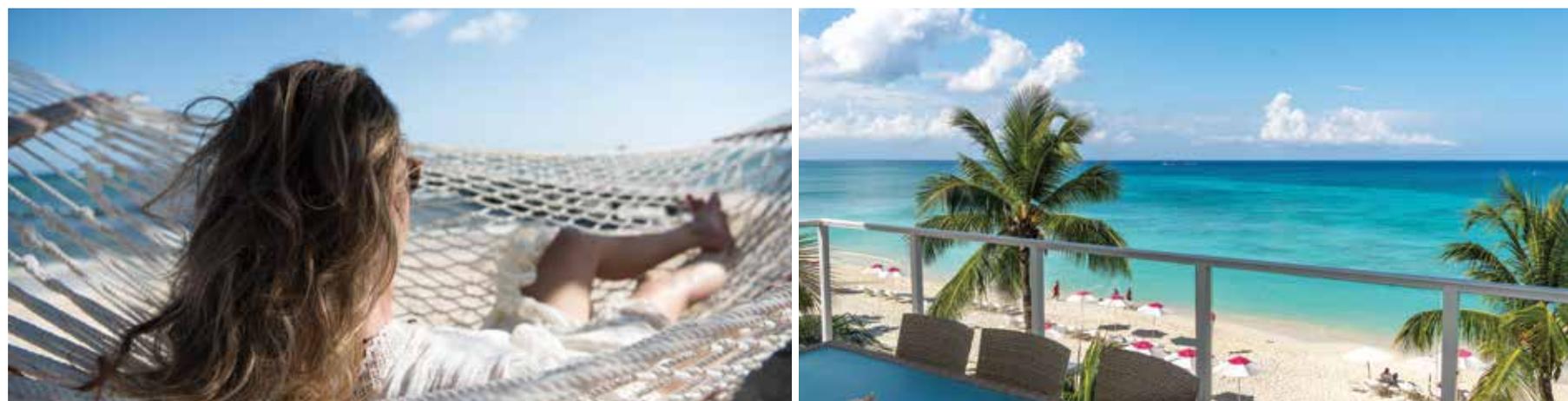
As the destination eased travel restrictions and Omicron-related disruptions decreased, stay-over arrivals improved from -85.6% in January 2022 (over 2019) to -72.7% in February and -61.8% in March. By June 2022 stay-over visitation improved to -45.7% (over 2019).

On 20 January 2022, the government eased entry requirements when unvaccinated children aged 11 and younger were permitted to travel to the Cayman Islands as they could assume the vaccination status of their adult travel companions. Entry requirements were further eased on 18 February 2022 when securely verified travellers were no longer required to do on-island testing.

TABLE 1
STAY-OVER ARRIVALS BY MONTH, JAN-JUN (2019 VS 2022)

	2019	2022	# CHANGE	% CHANGE
JANUARY	41,365	5,962	(35,403)	-85.6%
FEBRUARY	44,876	12,271	(32,605)	-72.7%
MARCH	59,563	22,774	(36,789)	-61.8%
APRIL	46,079	25,114	(20,965)	-45.5%
MAY	40,591	21,889	(18,702)	-46.1%
JUNE	48,230	26,191	(22,039)	-45.7%
TOTAL	280,704	114,201	(166,503)	-59.3%

The first quarter of 2022 was 73% lower than in 2019. The second quarter of 2022 was 46% lower than in 2019.



Source: Cayman Islands Customs & Border Control

WHERE ARE OUR STAY-OVER VISITORS COMING FROM?

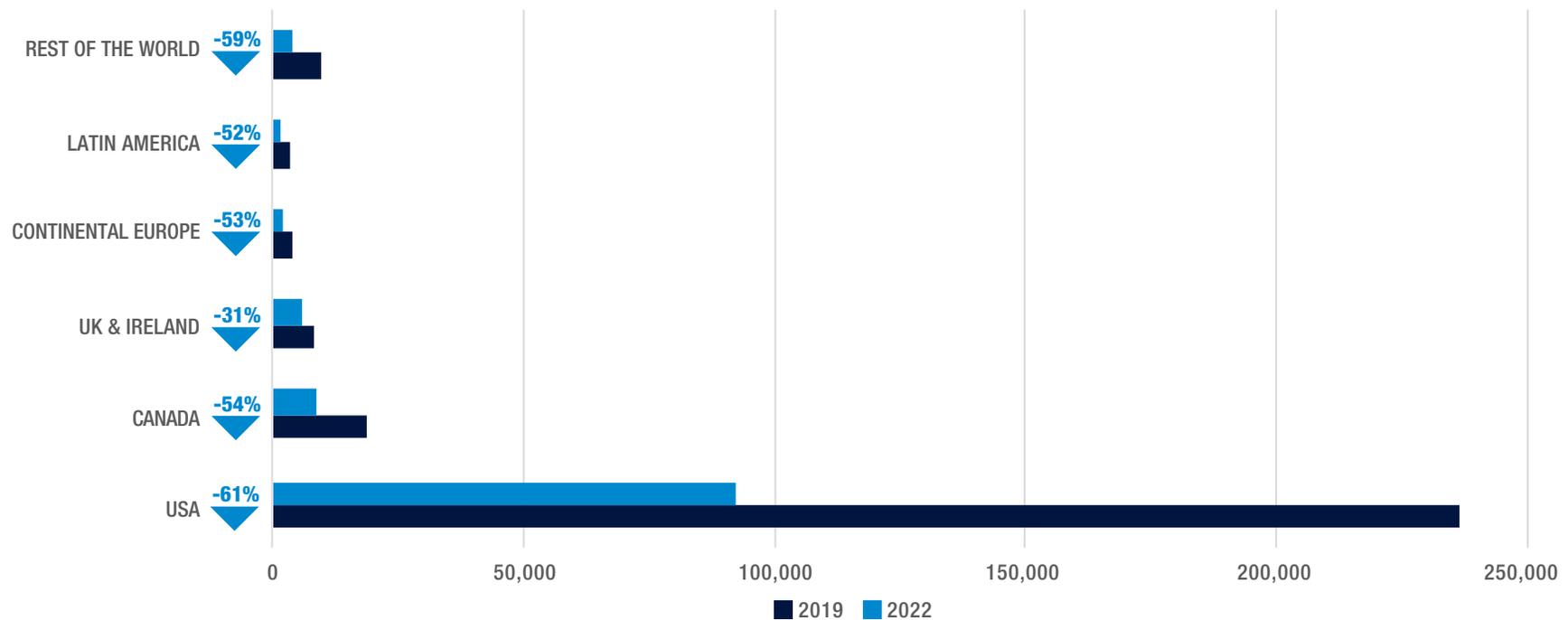
STAY-OVER ARRIVALS BY REGION

Overall performance was driven by arrivals from the United States, Canada and the UK. Stay-over visitor arrivals from the US was 61% below 2019. UK & Ireland were recovering at a faster pace with visitation being -31% compared to 2019.

The United States accounted for 81.1% of visitation. The US was followed by Canada (7.4%), UK & Ireland (5%) and Continental Europe (1.7%).

FIGURE 3

STAY-OVER VISITOR ARRIVALS BY REGION, (JAN-JUN 2019 VS 2022)



The US accounted for 81.1% of stay-over visitation.

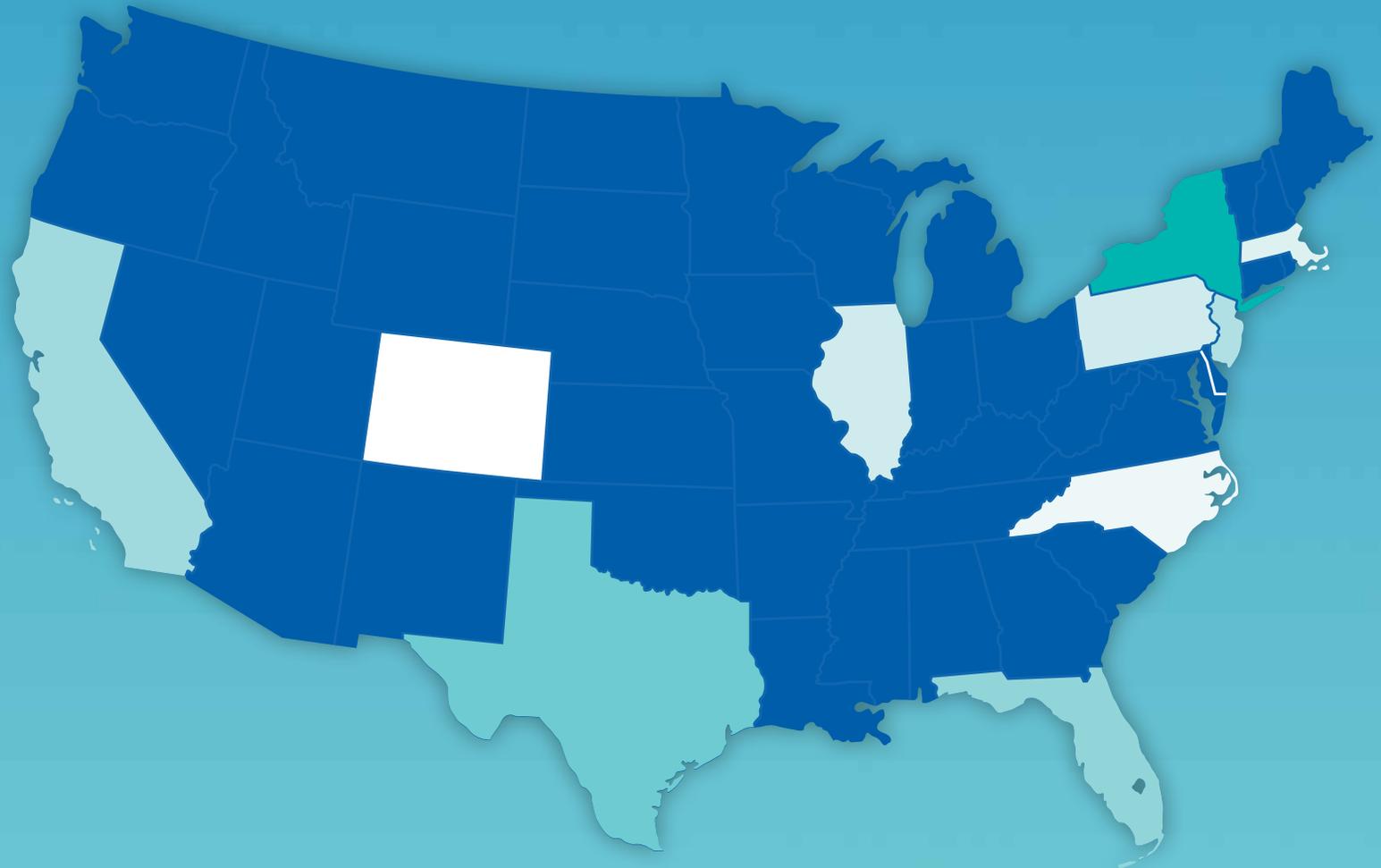
US STAY-OVER ARRIVALS BY STATE

New York, Texas and Florida were the top states for visitor arrivals in the first half of 2022. The top three states accounted for 31.9% of visitation from the US Market. Within the top ten states, Colorado, California, and Florida recorded the fastest recovery rate when 2022 is compared to 2019.

FIGURE 4

US STAY-OVER ARRIVALS, TOP 10 STATES (JAN-JUN 2022)

NEW YORK	11.3%
TEXAS	10.9%
FLORIDA	9.7%
CALIFORNIA	5.6%
NEW JERSEY	5.0%
ILLINOIS	4.7%
PENNSYLVANIA	4.1%
MASSACHUSETTS	3.6%
NORTH CAROLINA	3.4%
COLORADO	3.4%



CHARACTERISTICS OF STAY-OVER VISITORS

This section of the report aims to provide demographic profiles and analysis of the Cayman Islands stay-over visitor. Information provided includes demographics, previous visits, and average length of stay.

AGE OF STAY-OVER VISITORS

The average age of visitors for the first half of 2022 was 42.9 years old (1.2 years older than 2019). The median age increased from 44 years in 2019 to 45 years in 2022.

The 36-49 years old age group recorded the largest percentage share of visitation in 2022 with 24%. The 36-49 group was followed by the 50-60 and over 60 age groups with 21.3% and 20.4%, respectively. The 0-18 years old age group recorded the largest decrease when 2022 is compared to 2019, moving from 16.7% of visitation to 15.1% in 2022 (-1.6 percentage points). The 36-49 years old group decreased by 1.4 percentage points. The over 60 group increased from 17.5% of visitation to 20.4% in 2022 (+2.9 percentage points).

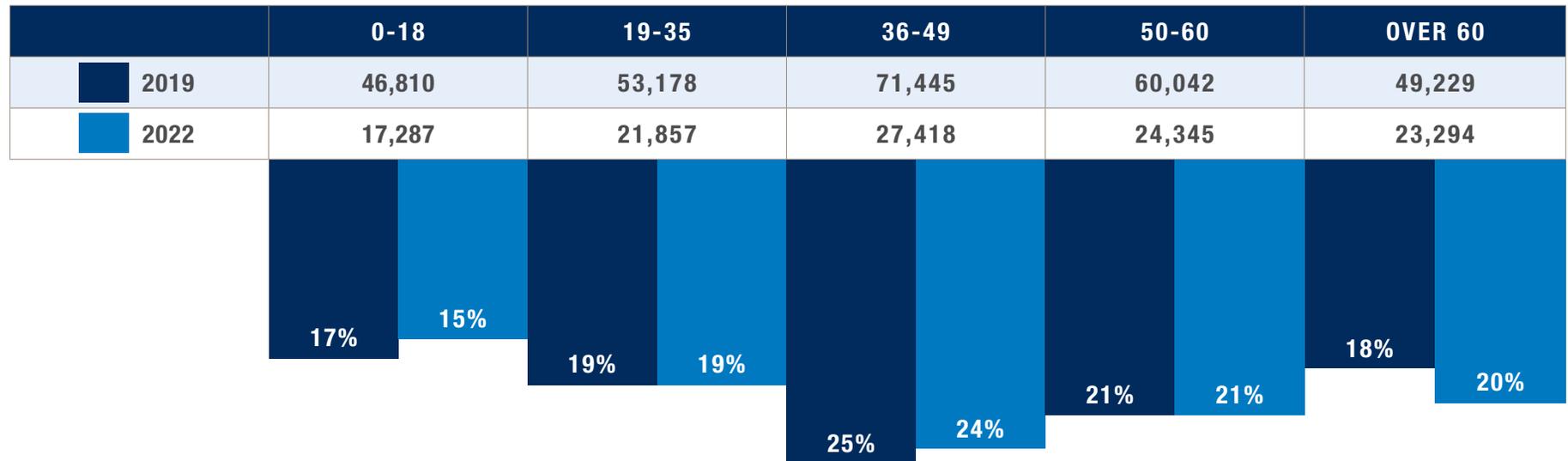
AVERAGE AGE

42.9

MEDIAN AGE

45

TABLE 2 & FIGURE 5
STAY-OVER ARRIVALS BY AGE GROUP, (JAN-JUN 2019 VS 2022)



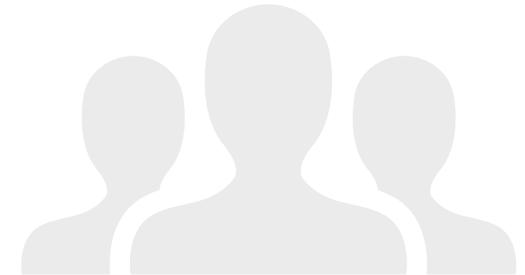
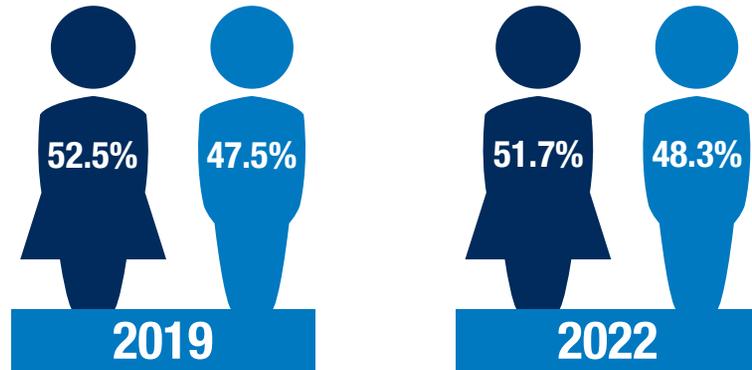
Source: Cayman Islands Customs & Border Control

GENDER OF STAY-OVER VISITORS

Female visitation accounts for 51.7% of visitation in 2022.

FIGURE 6

STAY-OVER ARRIVALS BY GENDER, (JAN-JUN 2019 VS 2022)

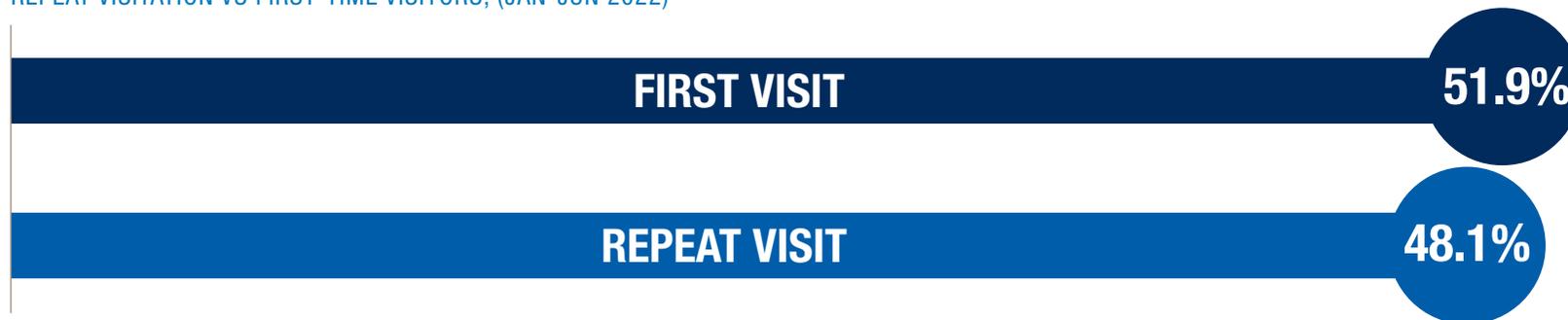


REPEAT VISITATION

In the first half of 2022 first-time visitation was 51.9% compared to 55.4% recorded in 2019.

FIGURE 7

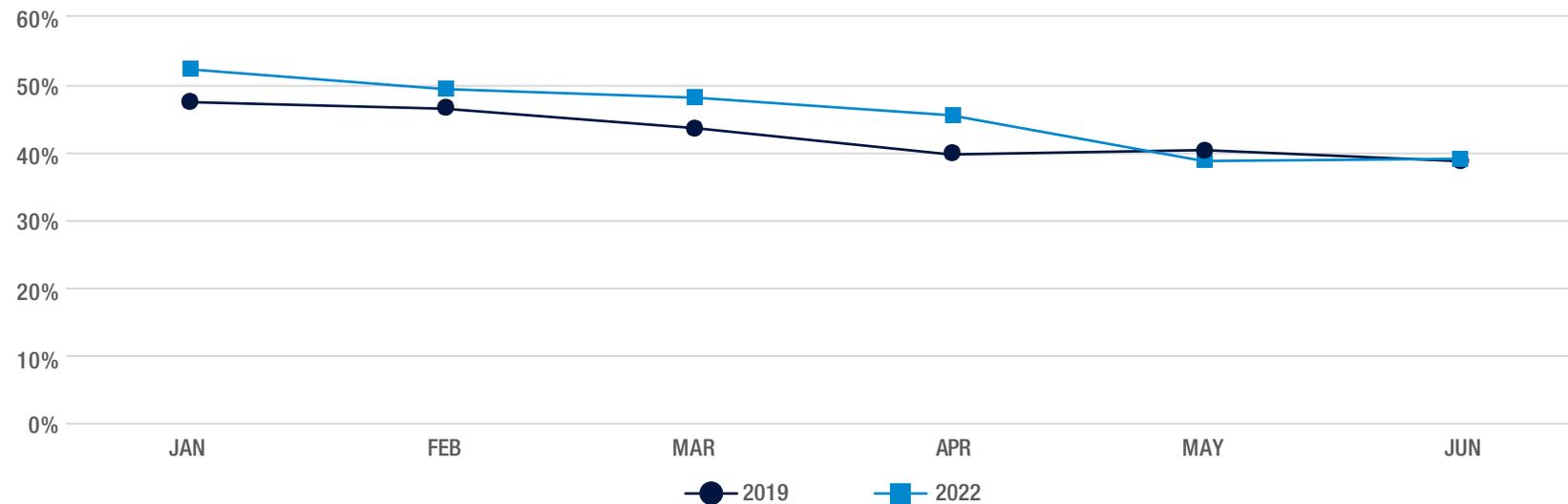
REPEAT VISITATION VS FIRST-TIME VISITORS, (JAN-JUN 2022)



The share of tourists who were on a repeat visit to the destination increased by 3.5 percentage points when 2022 is compared to 2019 (2019 - 44.6% and 2022 - 48.1%).

In January 2022, return visitors peaked at 52%, but gradually returned to the 2019 level by June 2022.

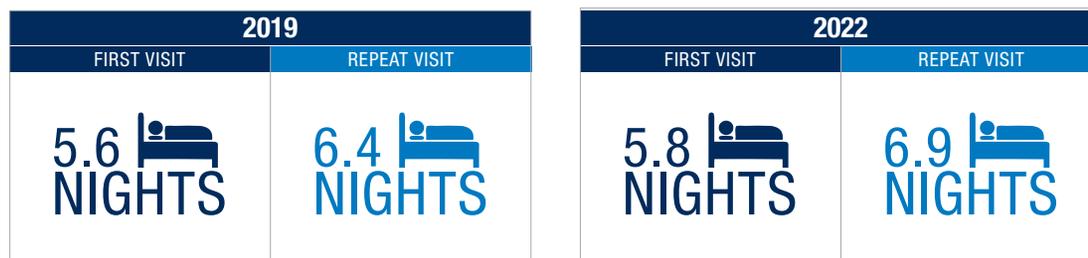
FIGURE 8
MONTHLY REPEAT VISITATION, (JAN-JUN 2019 VS 2022)



AVERAGE LENGTH OF STAY

The average length of stay increased to 6.2 nights in 2022 from 6.0 nights in 2019. Persons Visiting Relatives and on a Dive Vacation stayed the longest at 8.5 nights and 7.2 nights, respectively. Repeat visitors stayed an average of 6.9 nights and first-timers stayed 5.8 nights.

FIGURE 9
AVERAGE LENGTH OF STAY BY PREVIOUS VISITS



Source: Cayman Islands Customs & Border Control

Cruise Visitation

CRUISE VISITATION (JAN-JUN 2022)

212,997 Persons
78.9% fewer than 2019



CRUISE VISITOR ARRIVALS

Cruise ships were given the go-ahead by the Government of the Cayman Islands to resume calling on 21 March 2022, after a pause on cruise tourism since March 2020 due to the COVID-19 pandemic. The Cayman Islands welcomed 212,997 cruise visitors in the first six months of 2022. Visitation over this period was 78.9% below the visitation recorded over the same period in 2019. There has been a gradual increase in cruise tourist arrivals since the recommencement of cruise calls.

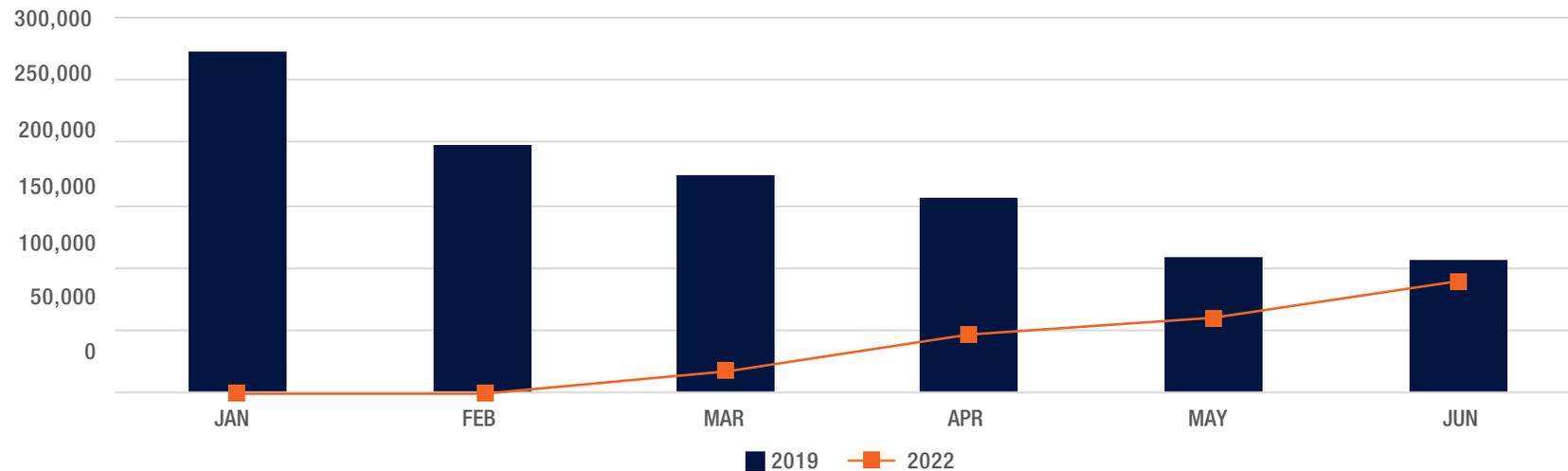
In June 2022, visitation peaked with 89,868 cruise visitors.

CRUISE ARRIVALS BY MONTH

The destination welcomed 16,879 passengers in March 2022. By the third month (in May 2022) of cruise calls, passenger arrivals were more than half the share of the same month in 2019 (56.3% of 2019). June 2022 cruise passenger arrivals were 86% of June 2019 arrivals.

FIGURE 10

CRUISE PASSENGERS BY MONTH, JAN-JUN (2019 VS 2022)



Source: Port Authority of the Cayman Islands

TABLE 3

CRUISE PASSENGERS BY MONTH, JAN-JUN (2019 VS 2022)

	PASSENGERS		CHANGE	
	2019	2022	#	%
JAN	271,111	0	(271,111)	-100.0%
FEB	197,234	0	(197,234)	-100.0%
MAR	172,700	16,879	(155,821)	-90.2%
APR	154,983	45,481	(109,502)	-70.7%
MAY	107,900	60,769	(47,131)	-43.7%
JUN	104,527	89,868	(14,659)	-14.0%
TOTAL	1,008,455	212,997	(795,458)	-78.9%



Source: Port Authority of the Cayman Islands

CRUISE ARRIVALS BY CRUISE LINE

Carnival Corporation accounted for 54% of cruise passenger arrivals to the Cayman Islands in 2022. Carnival Corporation was followed by Royal Caribbean (27%) and Disney Cruise Line (11%).

TABLE 4

CRUISE PASSENGER ARRIVALS BY MAJOR CRUISE CORPORATION, JAN-JUN (2019 VS 2022)



	PASSENGERS		% SHARE	
	2019	2022	2019	2022
CARNIVAL CORPORATION	492,384	114,004	49%	54%
DISNEY CRUISE LINE	57,954	23,545	6%	11%
MSC CRUISES	107,389	17,689	11%	8%
NORWEGIAN CRUISE LINE	74,850		7%	
ROYAL CARIBBEAN	267,028	57,759	26%	27%
OTHER	8,850		1%	
TOTAL	1,008,455	212,997	100%	100%

TABLE 5

MAJOR CRUISE CORPORATIONS' CAYMAN ISLANDS CALLS
(JAN-JUN 2019 VS 2022)

CRUISE LINE	2019	2022
CARNIVAL CORPORATION	157	37
DISNEY CRUISE LINE	17	10
MSC CRUISES	35	7
NORWEGIAN CRUISE LINE	23	
ROYAL CARIBBEAN	91	23
OTHER	11	
TOTAL	334	77



Accommodation Stock

The accommodation stock at 30 June 2022 was 7,116 bedrooms. This is 203 more bedrooms than 30 June 2019.

TABLE 6
ACCOMMODATION STOCK



	2019	2022
BEDROOMS	6,913	7,116
BEDS	9,753	10,131
BED PLACES (CAPACITY)	20,403	20,463

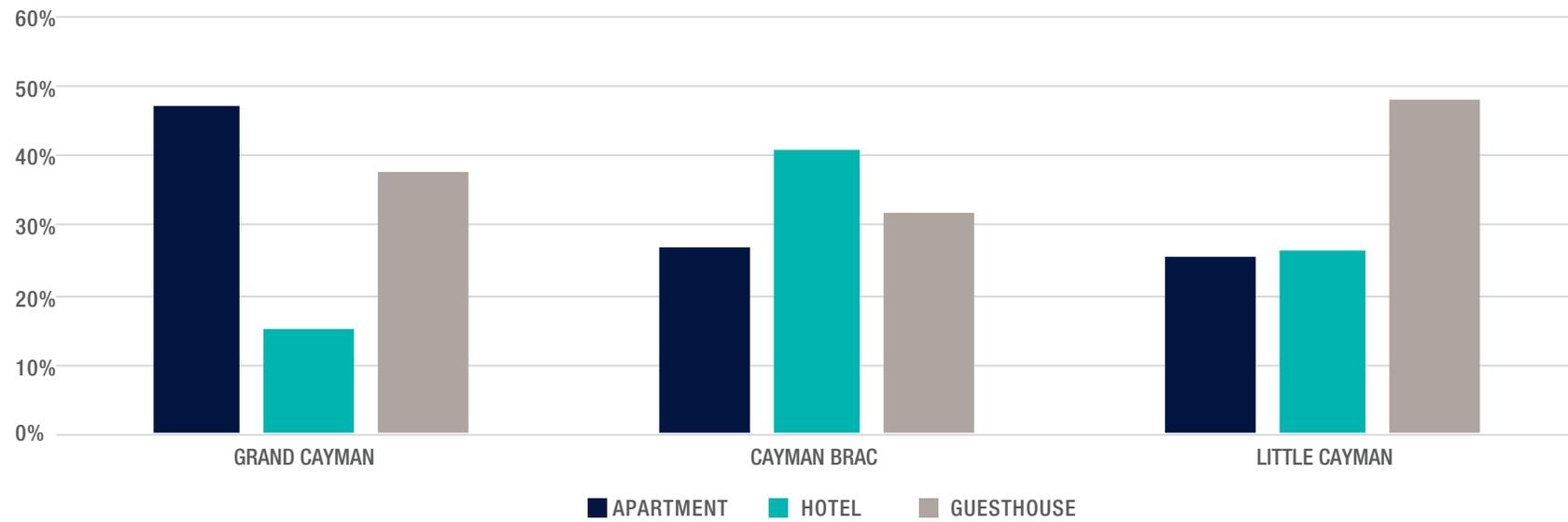
Of the total room stock in the destination on 30 June 2022, 6,688 were in Grand Cayman and 266 in Cayman Brac. Apartments accounted for the largest portion of the room stock with 3,258 bedrooms.

TABLE 7
ACCOMMODATION STOCK BY CATEGORY AND ISLAND

CATEGORY	GRAND CAYMAN	CAYMAN BRAC	LITTLE CAYMAN	TOTAL
APARTMENT (CONDOMINIUM)	3,145	72	41	3,258
GUESTHOUSE (VILLA)	1,025	109	43	1,177
HOTELS	2,518	85	78	2,681
TOTAL	6,688	266	162	7,116

Apartments accounted for the largest share of the bedroom stock in Grand Cayman. In Cayman Brac, guesthouses accounted for the largest share, while hotels accounted for the largest share of the bedroom stock in Little Cayman.

FIGURE 11
ISLAND SHARE OF ACCOMMODATION STOCK BY CATEGORY



Source: The Cayman Islands Department of Tourism
As at 30 June



DATA

Source

The primary data sources for this report were data from the Cayman Islands Customs and Border Control (CBC), Port Authority of the Cayman Islands (PACI), and the Cayman Islands Department of Tourism (CIDOT).

The Cayman Islands Customs and Border Control provided data on actual stay-over arrivals numbers and characteristics of each visitor from data collected on the Embarkation/Disembarkation (E/D) card. Data derived from the E/D card includes age, country of residence, length of stay, purpose of visit and previous visits.

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

STAY IN *Touch*

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ISSN (PRINTED VERSION): 2753-6661
ISSN (ELECTRONIC VERSION): 2753-667X

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CITATION:

Cayman Islands Department of Tourism (2022), Cayman Islands Destination Performance Bi-Annual Report 2022, Cayman Islands

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Grand Cayman, Cayman Islands
First printing: 2022
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Printed in the Cayman Islands.

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To access Cayman Islands tourism research and statistics, please visit the research section on the destination's website at visitcaymanislands.com/statistics. For further information, please contact the Market Research Unit:

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