

## CAYMAN ISLANDS

### Visitor Arrival Summary

The Cayman Islands continued to struggle as tourist arrivals in 2003 declined by 3.1 percent to reach 293.5 thousand. Growth was registered in the months of April, October and December. All others months had either flat performances or declines.

- ◆ The United States with a share of 79.2 percent was the largest market for the Cayman Islands. Some 12.4 thousand fewer tourists originated from this source in 2003. Following two years of steady declines, arrivals from Jamaica (the second largest market) rebounded with a 19.9 percent increase. More tourists also came from Canada (up 4.1 percent) and the United Kingdom (up 3.1 percent). Each of these markets claimed 4.8 percent of total market share. All other markets showed reduced numbers of tourists.
- ◆ Cruise passenger arrivals to the Cayman Islands rose by an estimated 15.5 percent in 2003 to reach 1.8 million, yet another record level. Appreciable increases characterized the majority of months. These were somewhat offset by the 7.9 percent decline during the May to August period.

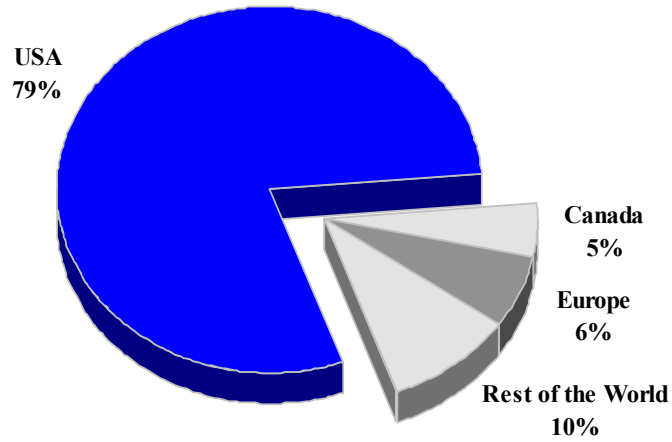
### TOURISM HIGHLIGHTS FOR 2003

VISITOR ARRIVALS			
Tourist Arrivals → → Summer → Winter	293,5156 0.7% 39.3%	Cruise Passengers → Summer → Winter Cruise Ship calls	1,818,979 61.4% 38.6% n.a
VISITOR PROFILE			
Average Length of Stay (nights) <sup>11</sup>	5.8	<b>Tourist Arrivals by Place of Stay</b>	
<b>Tourist Arrivals by Purpose of Visit</b>		→ Hotels	49.0%
→ Holiday	85.0%	→ Guest Houses/Apartments	24.4%
→ Business	5.6%	→ Private homes	14.8%
→ Other	9.4%	→ Other	11.8%
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Visitor Expenditure (US\$ millions) <sup>1</sup>	\$607.0	GDP at Market Prices (US\$ millions)	\$1,937.5
Tourism Budget (US\$ thousands) <sup>1</sup>	\$21,487	Consumer Price Index (% ch. 2003/'02)	0.6%
ACCOMMODATION STATISTICS		SOCIO-ECONOMIC STATISTICS	
Rooms <sup>1</sup>	5,238	Land Area (square Kilometres)	260
Room Occupancy Rates - Hotel	51.2%	Population (thousand mid year 2002)	42.5
- Non-hotel <sup>**</sup>	37.7%		

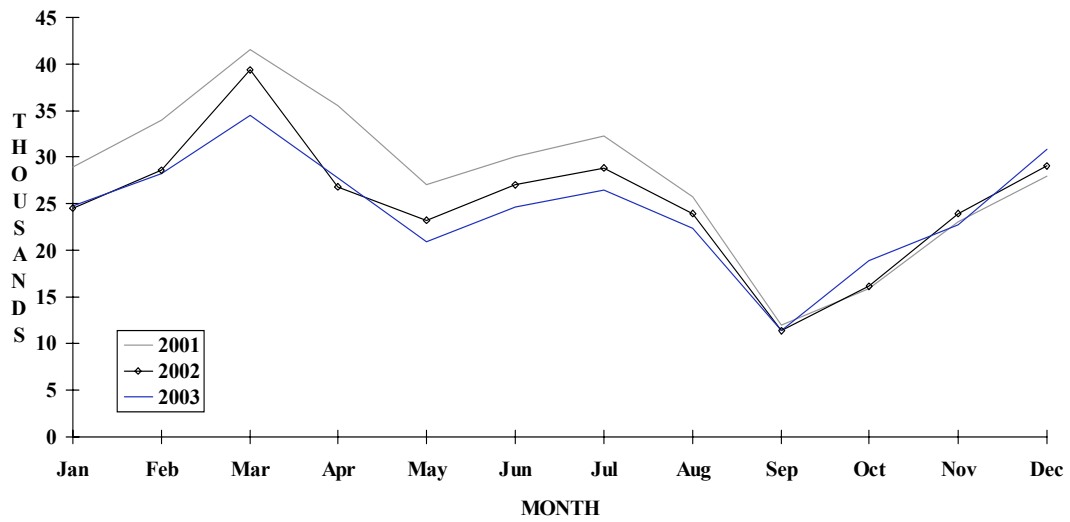
<sup>\*\*</sup> Includes apartments, condos, guesthouses, villas and bed & breakfast accommodations.

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## TOURIST ARRIVALS BY MAIN MARKETS 2003



## MONTHLY TOURIST ARRIVALS



## TOURIST ARRIVALS BY COUNTRY OF RESIDENCE

Country of Residence	1999	2000	2001	2002	% Share	
					2003	2003
United States	n.a	281616	270105	244862	232413	79.2
Canada	n.a	15003	13550	13569	14125	4.8
United Kingdom	n.a	16174	15605	13691	14115	4.8
Other Europe	n.a	6416	4891	4191	4099	1.4
Jamaica	n.a	20323	17879	15544	18639	6.4
Other Caribbean *	n.a	4142	3303	3436	3261	1.1
Rest of World	n.a	10413	8738	7504	6863	2.3
<b>TOTAL</b>	<b>345000</b>	<b>354087</b>	<b>334071</b>	<b>302797</b>	<b>293515</b>	<b>100.0</b>

\* Includes Costa Rica

## MONTHLY TOURIST ARRIVALS

Month	1999	2000	2001	2002	% Change	
					2003	2003/02
January	n.a	26879	28953	24545	24725	0.7
February	n.a	33678	34008	28608	28270	-1.2
March	n.a	39099	41558	39378	34421	-12.6
April	n.a	31908	35566	26768	27807	3.9
May	n.a	28789	27023	23229	20909	-10.0
June	n.a	32056	29986	27017	24662	-8.7
July	n.a	34004	32255	28844	26491	-8.2
August	n.a	24937	25765	23961	22422	-6.4
September	n.a	16033	11940	11333	11336	0.0
October	n.a	21684	15898	16151	18879	16.9
November	n.a	29214	23070	23903	22745	-4.8
December	n.a	35806	28049	29060	30848	6.2
<b>TOTAL</b>	<b>345000</b>	<b>354087</b>	<b>334071</b>	<b>302797</b>	<b>293515</b>	<b>-3.1</b>

## CRUISE PASSENGER ARRIVALS

Month	1999	2000	2001	2002	2003	% Change 2003/02
January	111619	106140	109765	156371	180915	15.7
February	96835	112236	107463	142563	171848	20.5
March	126202	135683	119752	158156	171629	8.5
April	101229	97287	106152	143649	178249	24.1
May	53017	64639	98591	127425	111645	-12.4
June	66733	66197	85528	121301	116292	-4.1
July	71845	61328	91875	137742	132933	-3.5
August	66588	81750	97420	126643	111875	-11.7
September	46562	46532	64890	69328	113258	63.4
October	76308	57649	84270	88328	159589	80.7
November	104121	107919	117495	130113	163955	26.0
December	114463	93497	131556	173131	206791	19.4
<b>TOTAL</b>	<b>1035522</b>	<b>1030857</b>	<b>1214757</b>	<b>1574750</b>	<b>1818979</b>	<b>15.5</b>
Cruise ship calls	634	605	612	731	n.a	

## TOURIST ACCOMMODATION (Rooms)

Type of Accommodation	1999	2000	2001	2002	2003
Hotels	1977	2815	2844	2712	n.a
Apts./Cottages	2341	-	-	-	n.a
Guest Houses	-	-	-	-	n.a
Other	-	2549**	2650	2526	n.a
<b>TOTAL</b>	<b>4318</b>	<b>5364</b>	<b>5494</b>	<b>5238</b>	<b>n.a</b>

\* Closure of Holiday Inn and conversion of Royal Pavilion to office use were mainly responsible for room reduction in 1998

\*\* Includes Apartments, Guesthouses, Villas & Condos

Source: Department of Tourism, Cayman Islands